



VisitTheUSA.com

Brand USA

International Travel & Consumer Sentiment

May 12, 2021



Welcome

As vaccines become more available and the world cautiously begins to re-open, we all feel an increased desire to welcome international travelers to visit the U.S.

Our goal for today is to provide some practical advice to help you make good decisions about the return to marketing, including:

- The importance of reassuring wary tourists that it's safe to travel in the U.S.
- Prioritization of countries based on market conditions and consumer intent
- Opportunities for you to take advantage of the momentum in those countries that are getting ready to travel soon

Market Intelligence

What consumers are saying



International travel is a high budget priority



43.6%

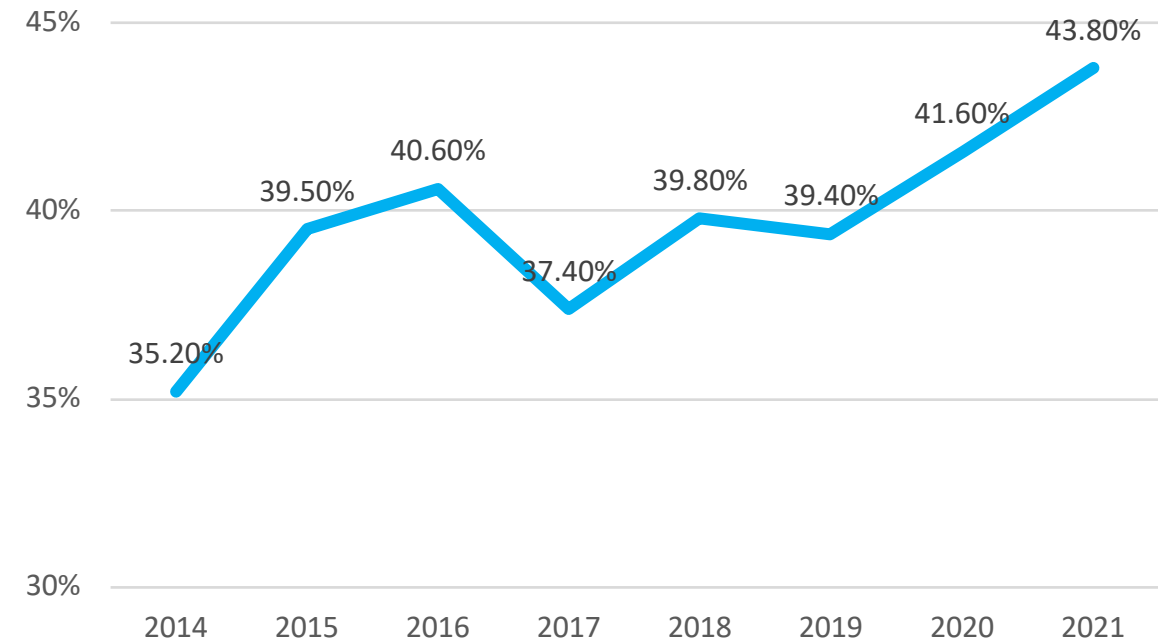
Expect to TAKE MORE international trips this year compared to last



41.0%

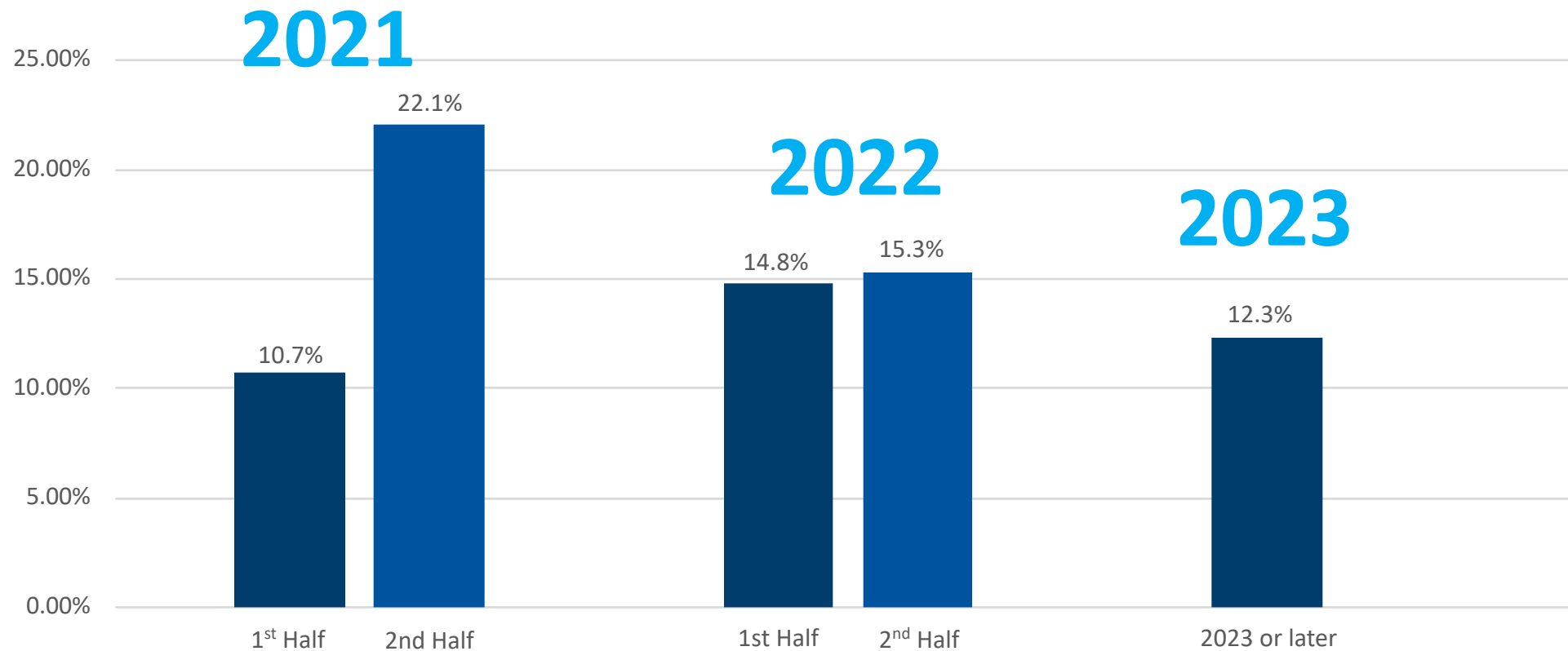
Expect to SPEND MORE on international trips this year compared to last

International Travel as a “High” or “Extremely High” Budget Priority, Total Aggregate



Travelers want to get back to the USA soon

Timing of future visits to the United States

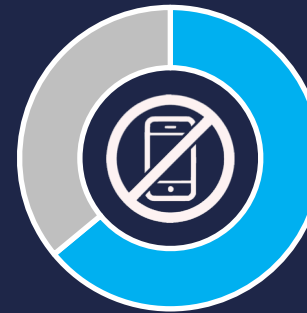


Consumers are looking forward to traveling



87%

Agree that having a trip planned in the future gives them something to look forward to.



64%

Are willing to give up social media for a month to go on vacation.



76%

Are creating their destination wish list for future travel even though they might not be able to travel yet.

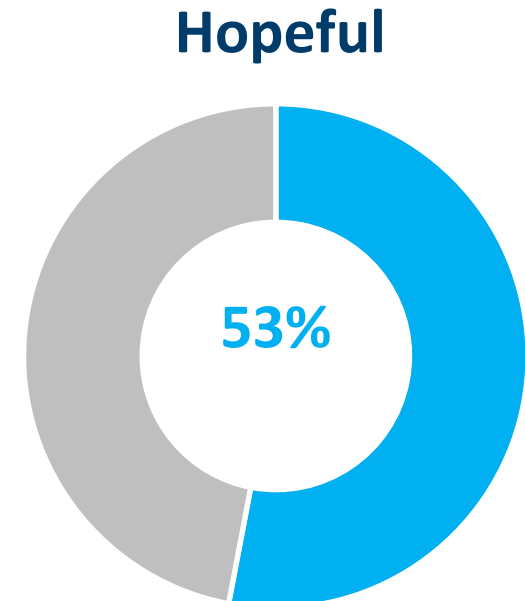
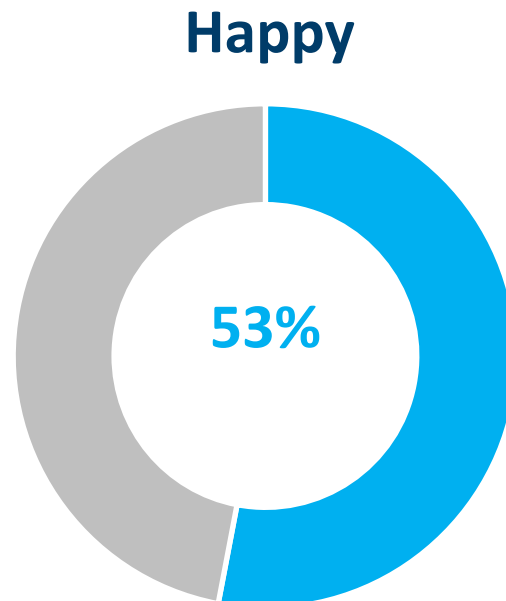
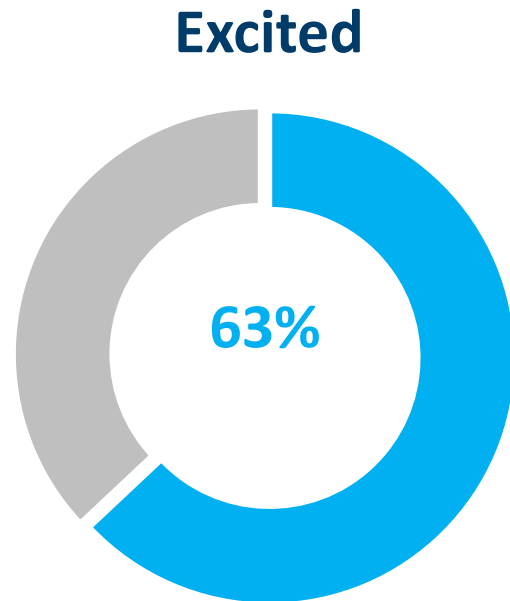


56%

Are willing to book a trip now even if they might have to cancel it in the future.

Travel planning brings hope

Planning future travel makes consumers feel...



Travel planning brings connection

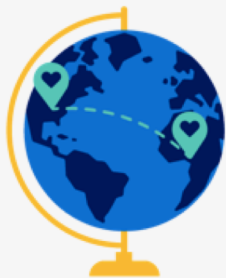
Consumers want to travel to make connections with friends & loved ones

Consumers Plan Future Travel to Strengthen Relationships with Family & Loved Ones¹

LOVED ONES

ROMANTIC GETAWAY

FAMILY VACATION



86%

IN INDIA

75%

IN AUSTRALIA

Want to travel to visit
loved ones that they couldn't
see in 2020

Consumers Plan Future Travel to Strengthen Relationships with Family & Loved Ones¹

LOVED ONES

ROMANTIC GETAWAY

FAMILY VACATION



82%

IN MEXICO

79%

IN UNITED STATES

69%

IN CANADA

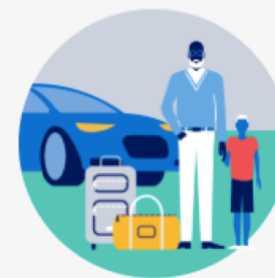
Want to travel to enjoy
a romantic getaway with
their spouse

Consumers Plan Future Travel to Strengthen Relationships with Family & Loved Ones¹

LOVED ONES

ROMANTIC GETAWAY

FAMILY VACATION



75%

IN UNITED KINGDOM

70%

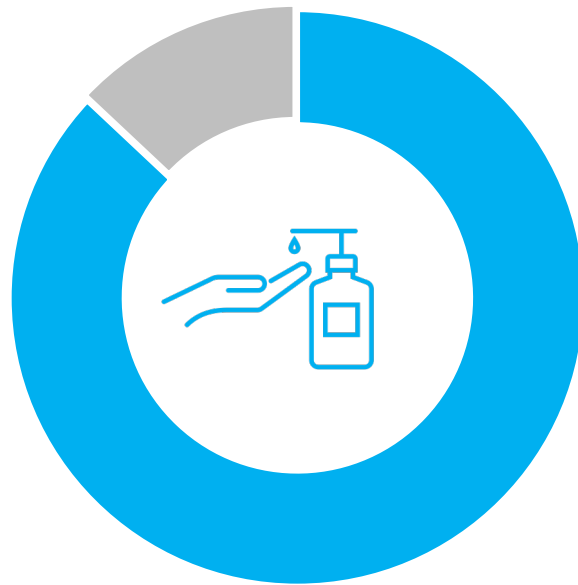
IN JAPAN

Want to travel to take
a vacation with their
family in 2021

Concerns about personal health & safety remain

According to Trip Advisor, a new consumer mindset has emerged

Concerns about personal health and safety, as well as the safety of friends and family, has jumped to the top of their necessities for travel.



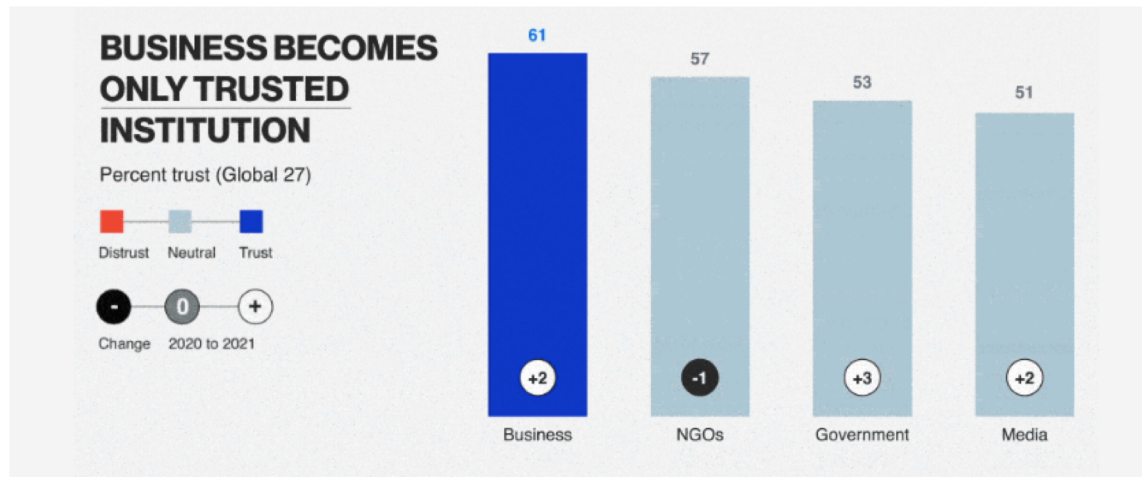
87%

of consumers consider **safety and cleanliness** of establishments an important factor when traveling locally

Unbiased and reliable content is critical

Influencers & online video can help build traveler confidence

Since the pandemic, businesses have emerged as more trustworthy than other institutions



Reliance on KOLs and online video travel content for inspiration has increased over the last few years

Sources of Destination Inspiration
(Overall – all countries)

	2018	2019	2020	2021	% CHG 2020-2021
Opinions of friends and relatives — in person/ through direct contact	58.2%	54.0%	52.9%	46.1%	-12.9%
Online Media— Travel content found on Internet	45.1%	42.5%	44.2%	42.8%	-3.1%
Opinions of friends and relatives — via social media	31.5%	30.4%	31.4%	29.5%	-6.3%
Opinions & experiences of digital influencers	26.5%	25.6%	27.5%	28.4%	3.6%
Online VIDEO travel content (Video only)	23.5%	24.8%	26.3%	28.3%	7.5%
Travel agencies or tour operators	28.9%	27.2%	23.4%	23.1%	-1.2%
Offline Media—TV, printed newspapers, magazines	20.6%	19.6%	19.1%	19.0%	-0.9%
Television	20.4%	19.1%	18.2%	15.2%	-16.6%
Movies	12.1%	11.2%	12.1%	10.0%	-17.2%



Consumers are becoming conscious travelers

- **77%** want to support small, local businesses while traveling
- **72%** are passionate about traveling to destinations to help boost the local economy
- **69%** are interested in visiting lesser-known destinations
- **69%** want to choose an airline/hotel that values diversity and inclusion

A vertical photograph on the left side of the slide shows a scuba diver in a yellow and black suit swimming upwards towards the surface. The diver is positioned in the center-left of the frame. Below the diver, a diverse coral reef is visible, featuring various types of coral in shades of orange, yellow, and brown. The water is a clear, deep blue, and sunlight filters down from the surface, creating a bright, airy atmosphere.

Intent to travel to the USA

In the year ahead, travel will play an increasingly critical role in strengthening connections, broadening horizons and bridging divides.¹

Travelers around the world want to travel internationally and are demonstrating progressively more optimism about booking their trips.

International markets will come back on-line, but at different paces, depending on infection rates, vaccine availability, and entry and exit policies.

¹Source: Expedia Group's 2021 Travel Trends Report

International Insight

Mapping the return to travel



Consumer sentiment varies by country

As we move towards recovery, however, we see consistencies from travelers across markets

- Top 3 factors required to make the general population feel safe to travel overseas* again are:
 - Low number of cases in destination
 - Air passenger requirements
 - Having the COVID vaccine
- Most significant deterrents for overseas* travel:
 - Requirement to quarantine in destination
 - Requirement to submit and pay for COVID-19 tests before departure/returning flights

* International travel for Canada and Mexico
Base: All respondents
Source: Brand USA/Engine, custom study



Return to Travel: Phase 1 Recovery Markets

The following are Brand USA's phase one recovery markets as these are expected to be the first to return to travel to the USA based on proximity and familiarity.

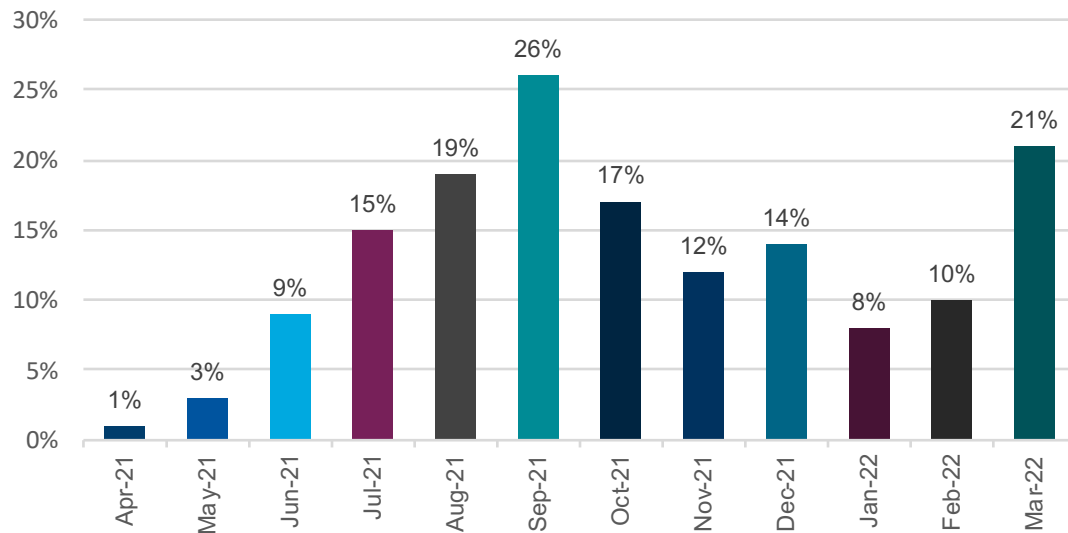
- UK
- Germany
- Mexico
- Canada



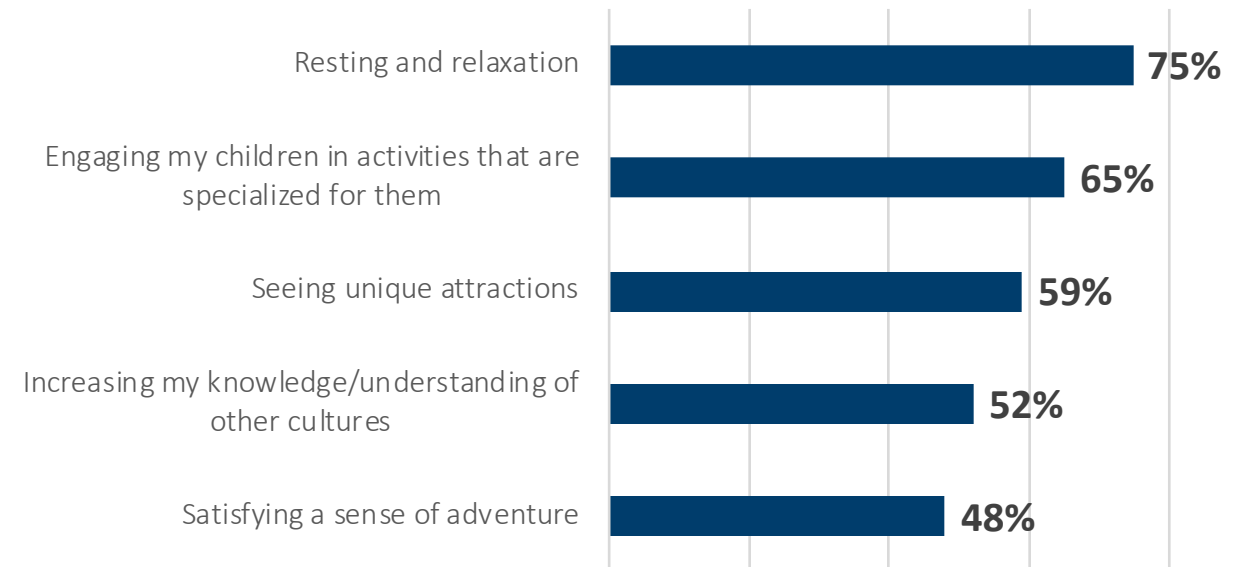
UK: Planning & Considerations

UK Travelers demonstrate optimism for summer/fall 2021 international travel

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



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

Source: Brand USA/Engine, custom study

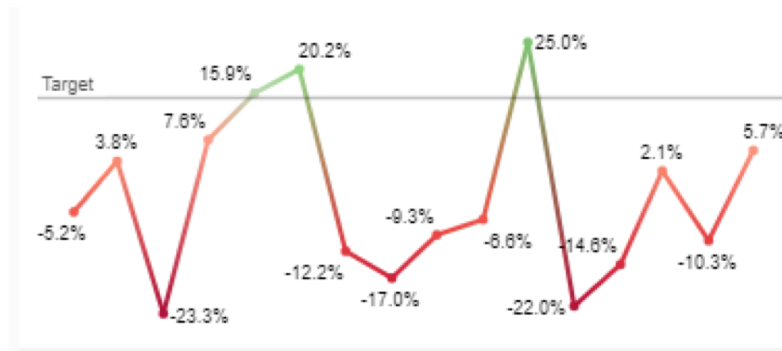
UK: Gating Criteria

U.S. Entry Policy: Strict Restrictions

Google Trends

May Google Topics Index
46.0

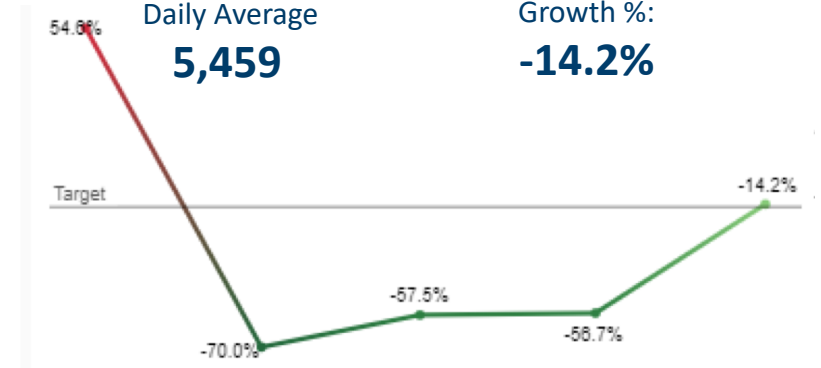
May - MOM % Change
5.7%



COVID Cases

Current Month
Daily Average
5,459

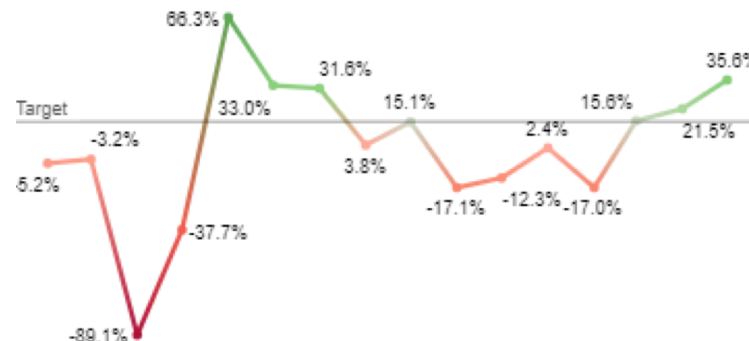
Daily Average MoM
Growth %:
-14.2%



Airline Schedule Capacity

May Airline Capacity
241,762

May - MOM % Change
35.6%



Consumer Intent for International Travel

April Intent for
International Travel
52.0%

April - MOM % Change
0.0%



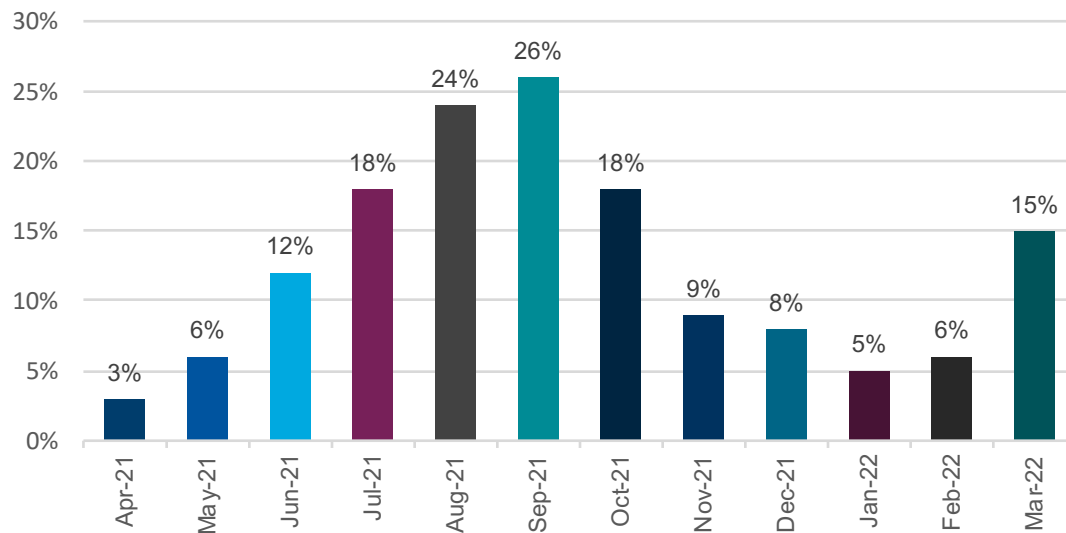
Source: thebrandusa.com/covid-19-indicator-dashboard

The Brand USA Covid-19 Indicator Dashboard is populated with data based on data from Google Trends, Sabre, Johns Hopkins, Government travel policies and Brand USA/Engine, custom study

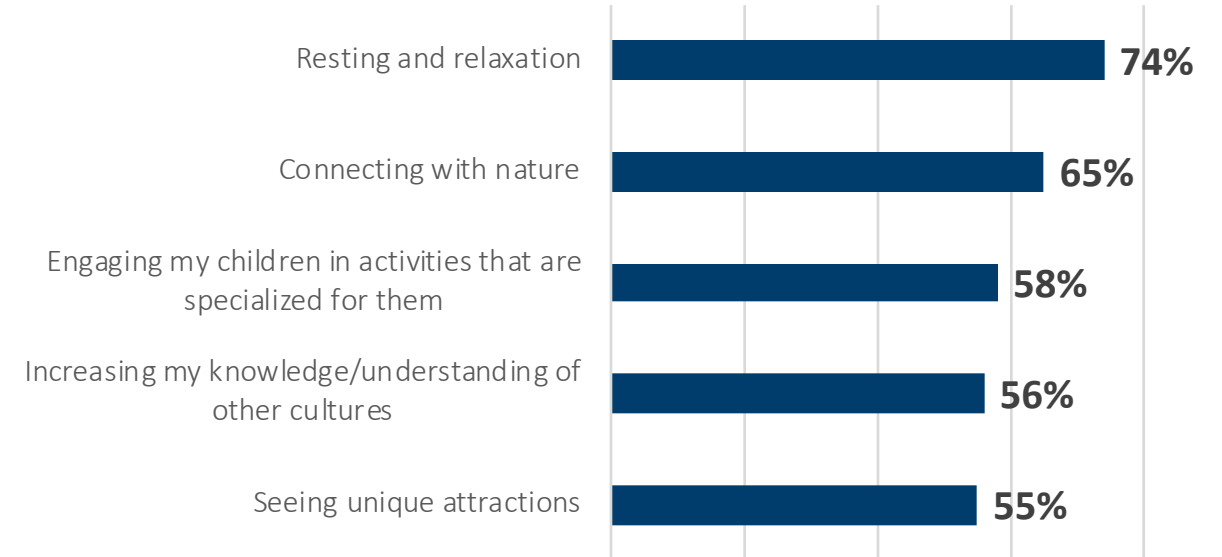
Germany: Planning & Considerations

German travelers demonstrate optimism for international travel in summer and fall 2021

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



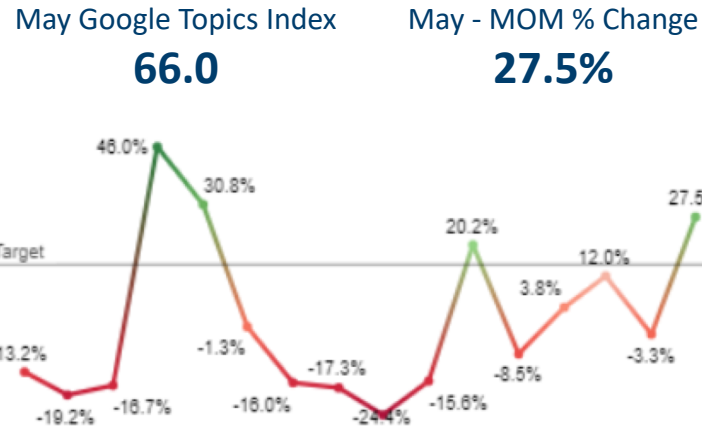
Base: Respondents who are likely to take an international trip in the next 12 months

Source: Brand USA/Engine, custom study

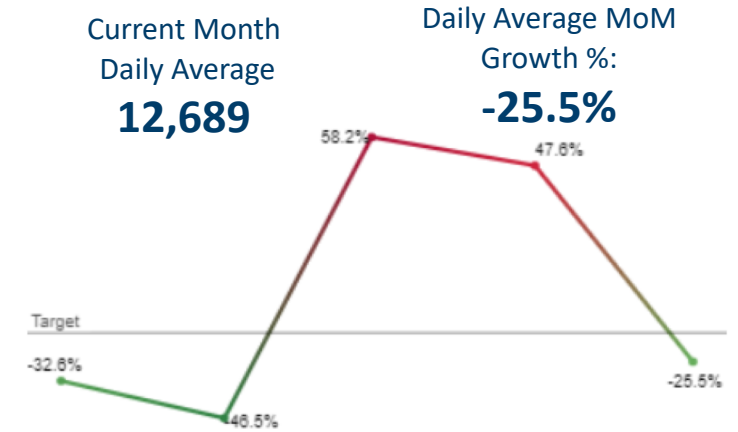
Germany: Gating Criteria

U.S. Entry Policy: Strict Restrictions

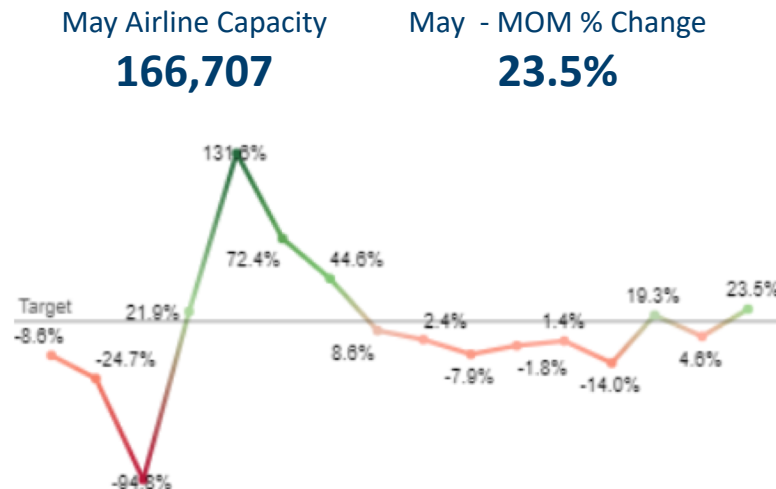
Google Trends



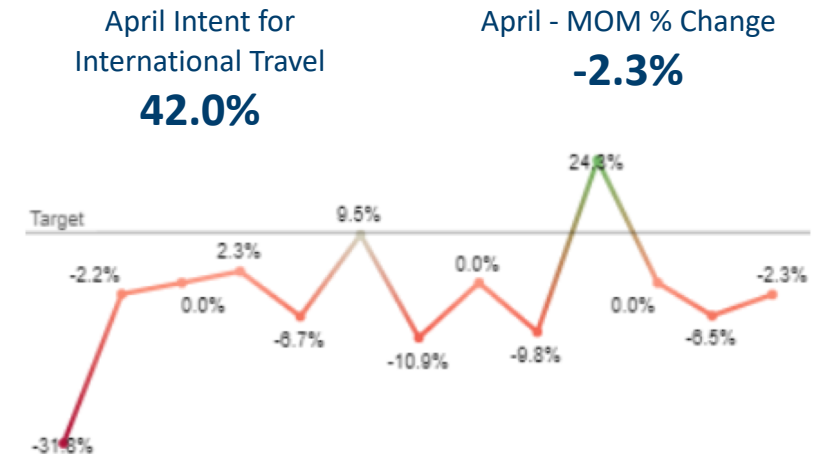
COVID Cases



Airline Schedule Capacity



Consumer Intent for International Travel



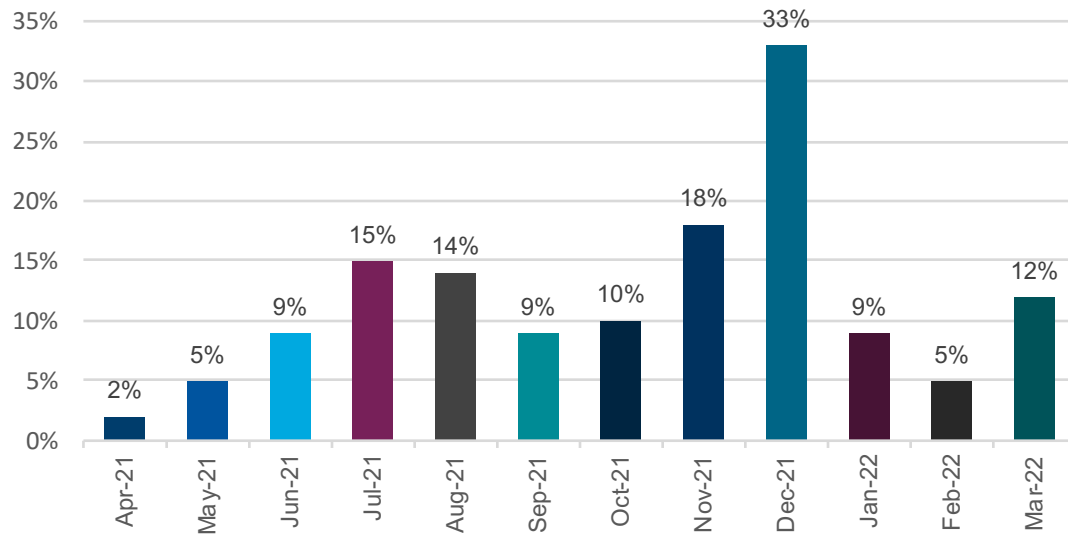
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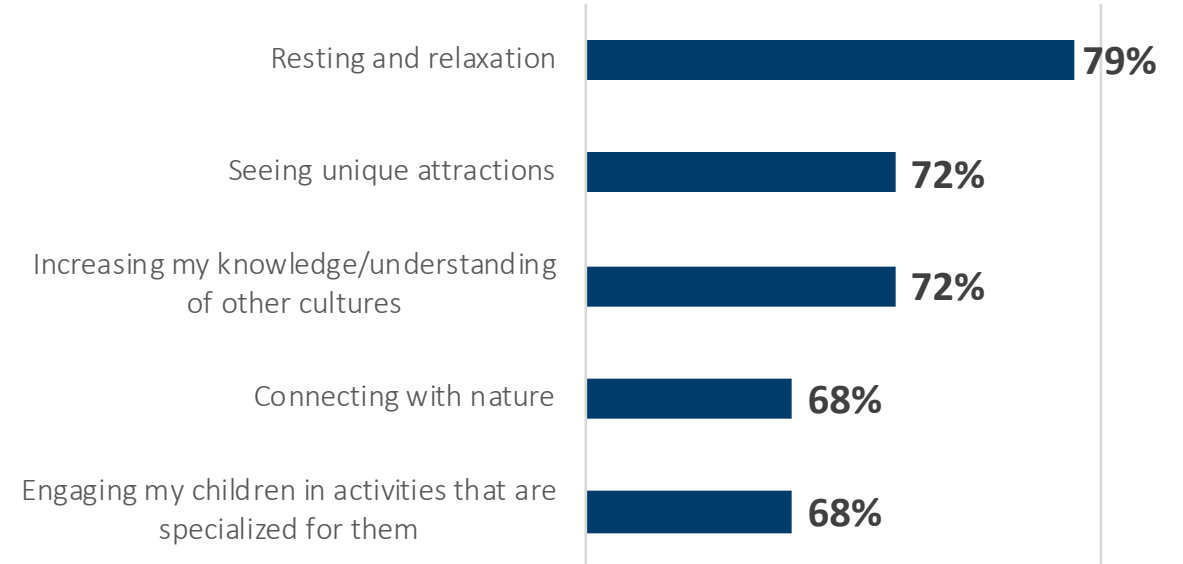
Mexico: Planning & Considerations

Mexicans' intent to travel during the 2021 winter holidays is high

**International Trip Planning:
Departure Month in the next 12 months**



**Personal Considerations When Deciding
International Destination**



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

Source: Brand USA/Engine, custom study

Mexico: Gating Criteria

U.S. Entry Policy:
Moderate Restrictions

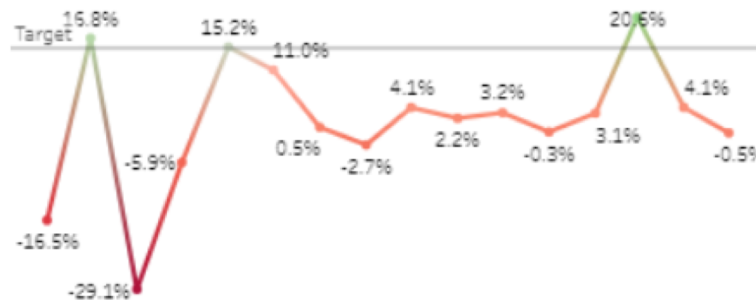
Google Trends

May Google Topics Index

94.0

May - MOM % Change

-0.5%



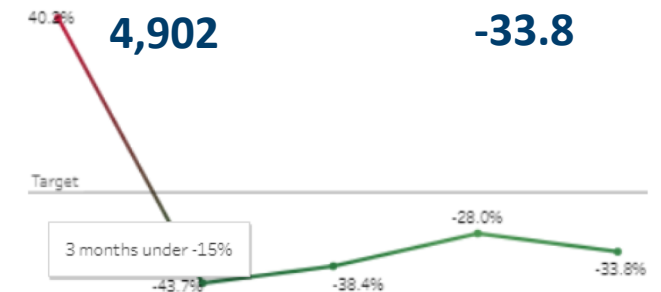
COVID Cases

Current Month
Daily Average

4,902

Daily Average MoM
Growth %:

-33.8



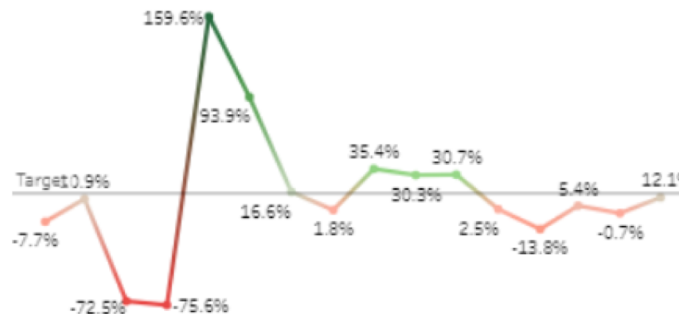
Airline Schedule Capacity

May Airline Capacity

1,661,235

May - MOM % Change

12.1%



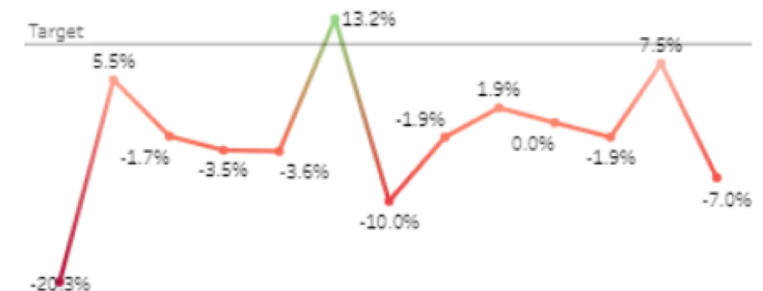
Consumer Intent for International Travel

April Intent for
International Travel

53.0%

April - MOM % Change

-7.0%



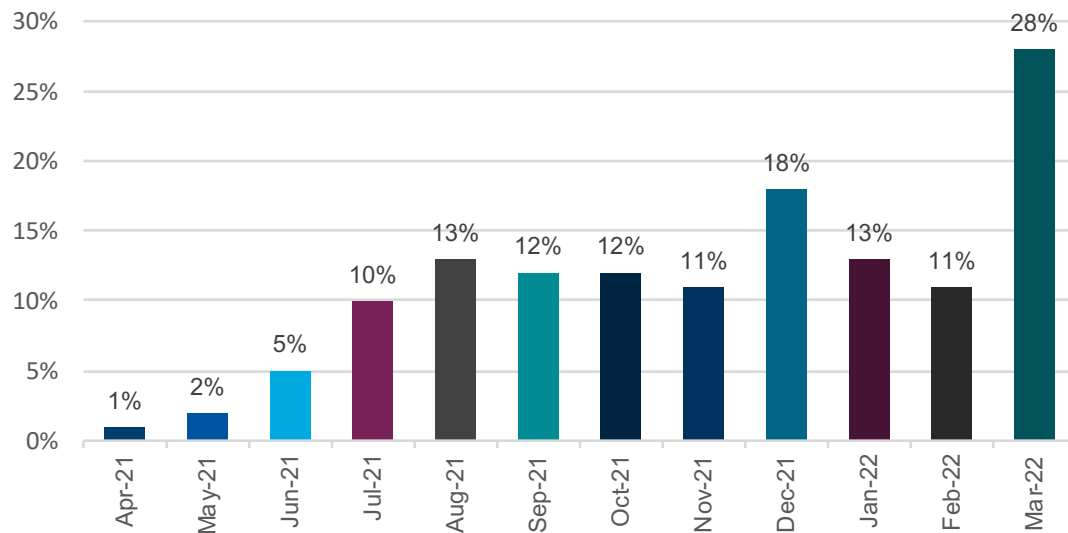
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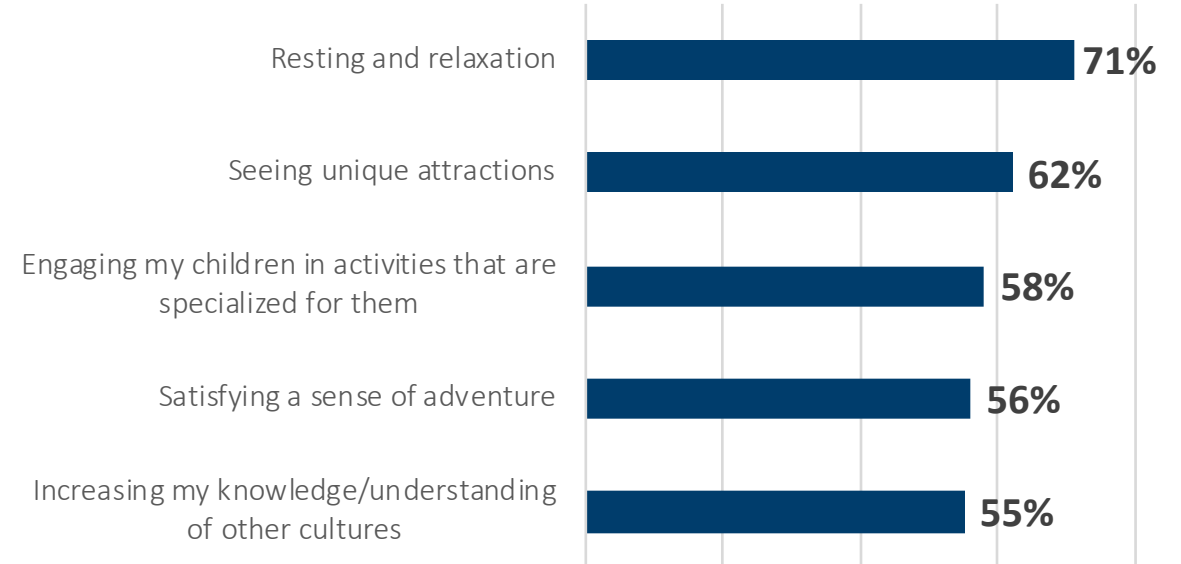
Canada: Planning & Considerations

Canadians plan international trips beginning in late 2021 and into spring of 2022

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



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

Source: Brand USA/Engine, custom study

Canada: Gating Criteria

U.S. Entry Policy:
Moderate Restrictions

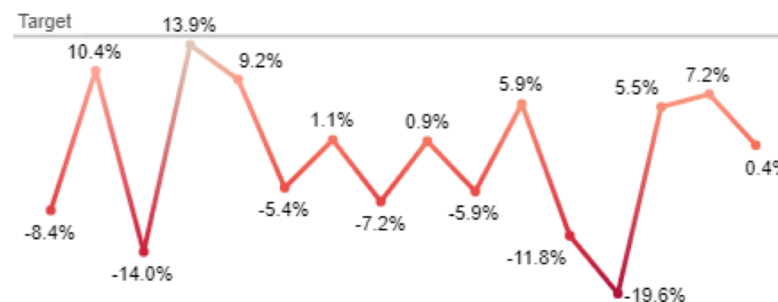
Google Trends

May Google Topics Index

67

May - MOM % Change

0.4%



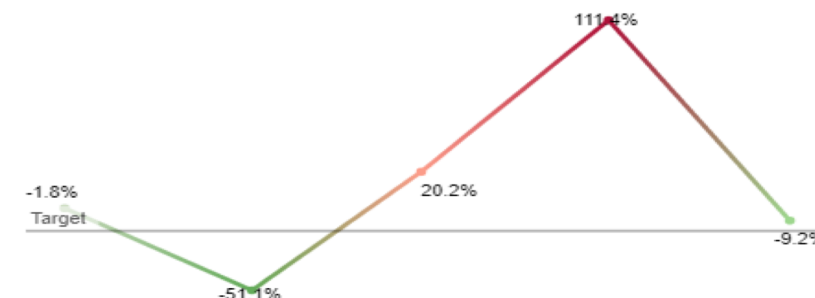
COVID Cases

Current Month
Daily Average

3,778

Daily Average MoM
Growth %:

-9.2%



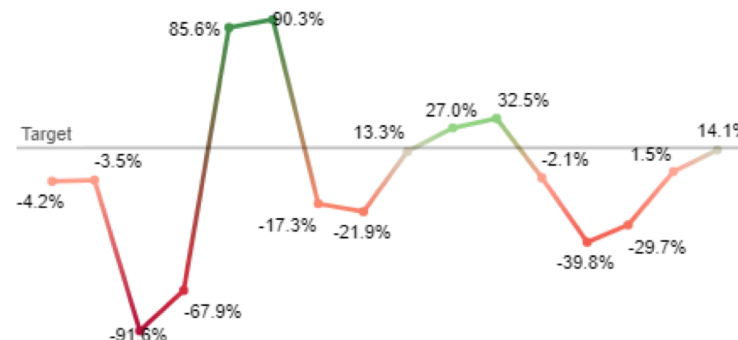
Airline Schedule Capacity

May Airline Capacity

85,795

May - MOM % Change

14.1%



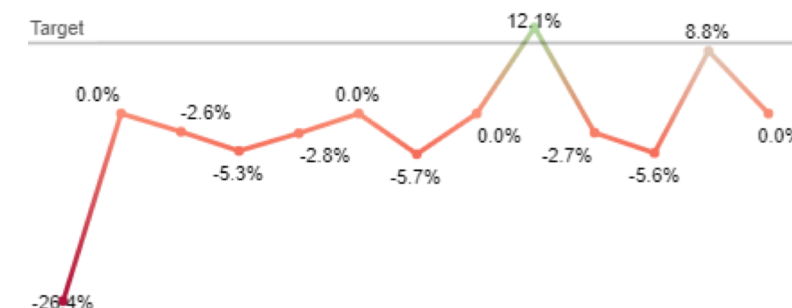
Consumer Intent for International Travel

April Intent for
International Travel

37.0%

April - MOM % Change

0.0%



Source: thebrandusa.com/covid-19-indicator-dashboard

The Brand USA Covid-19 Indicator Dashboard is populated with data based on data from Google Trends, Sabre, Johns Hopkins, Government travel policies and Brand USA/Engine, custom study

Key Takeaways

- Many markets demonstrate optimism for summer and fall international travel, with increased intent later in the year and into 2022
- Brand USA's phase one recovery markets include Germany, the UK, Canada, and Mexico based on proximity and familiarity
- Traveling with children will play an important role in international travel, as engaging the children in activities specialized for them has become more relevant as a personal consideration when selecting an international destination



Return to Travel: Next Up

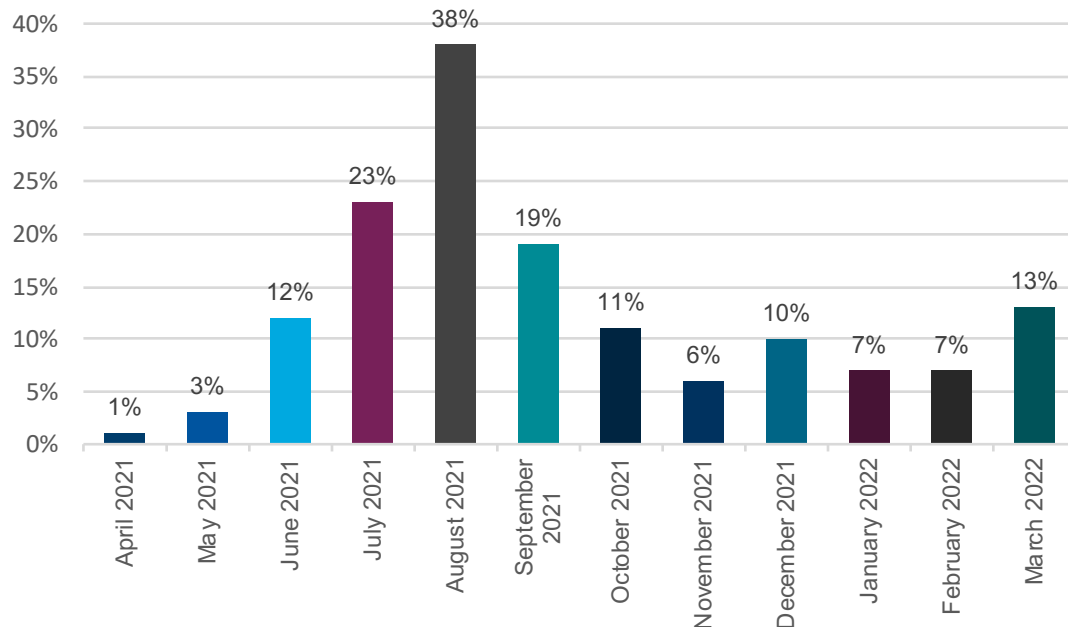
- France
- Australia
- South Korea
- China
- Japan
- Brazil
- India



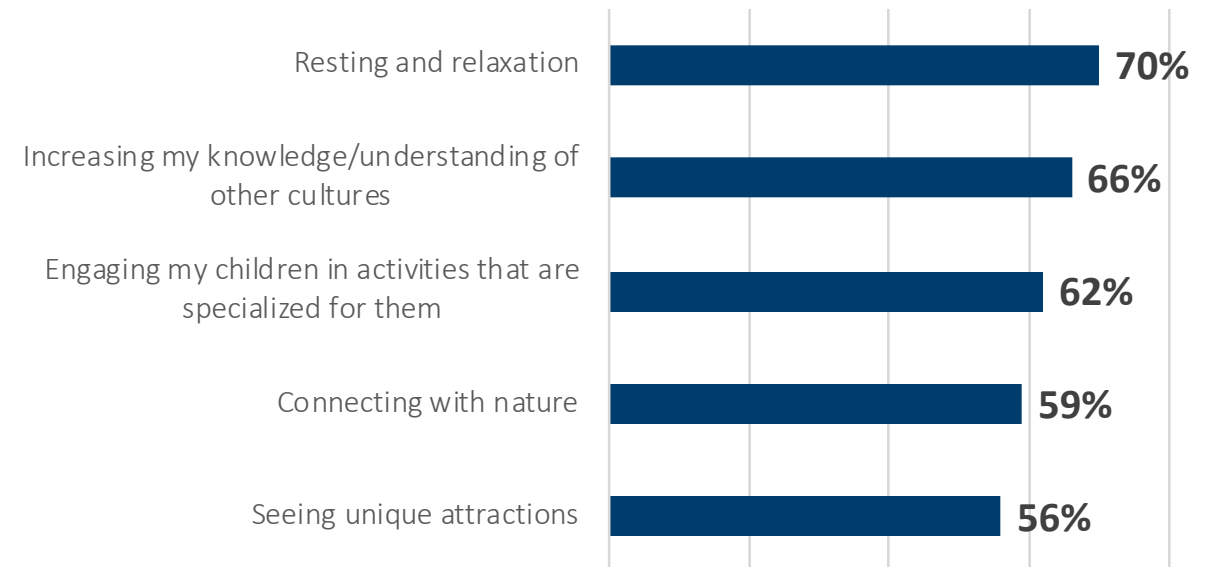
France: Planning & Considerations

French looking at summer/fall 2021 international travel

International Trip Planning:
Departure Month in the next 12 months



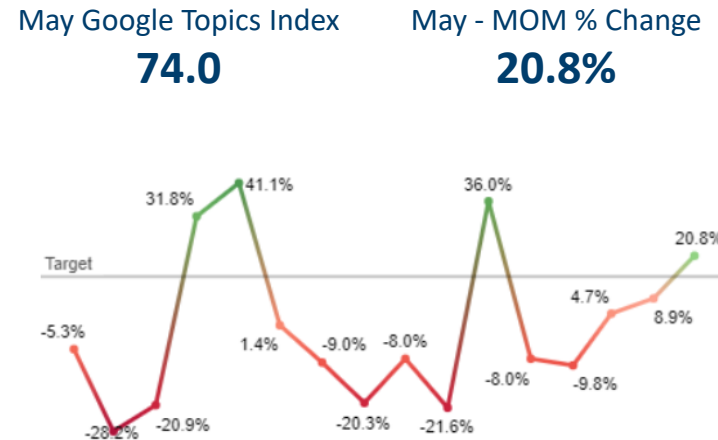
Personal Considerations When Deciding
International Destination



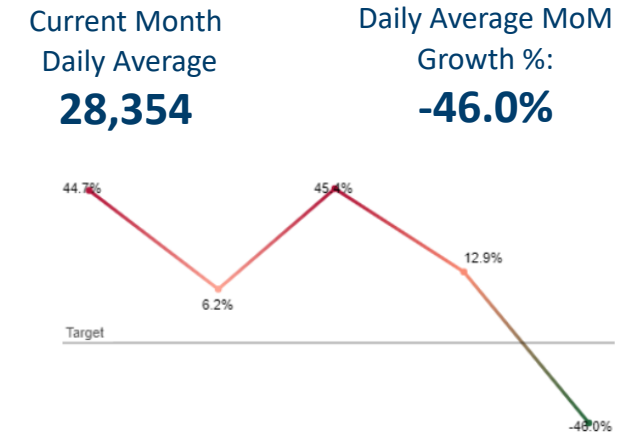
France: Gating Criteria

U.S. Entry Policy: Strict Restrictions

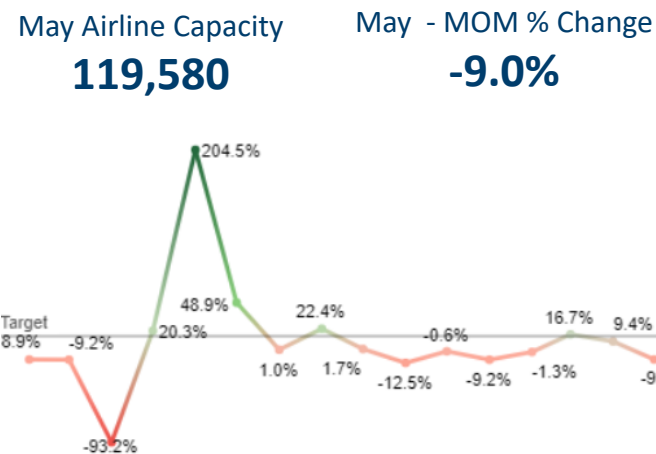
Google Trends



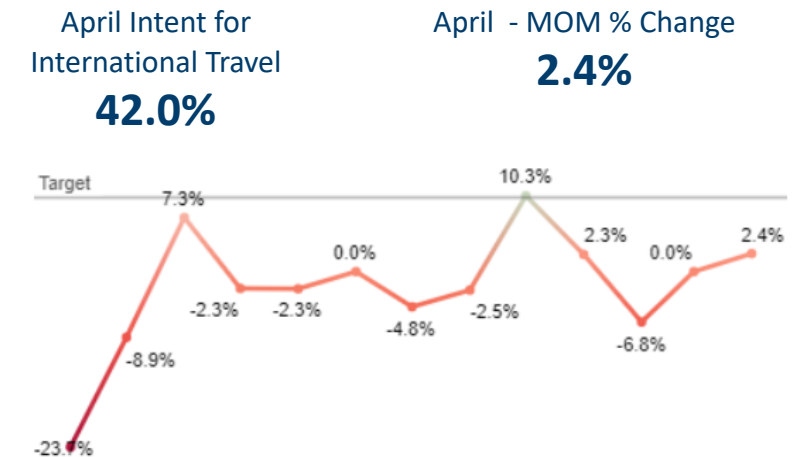
COVID Cases



Airline Schedule Capacity



Consumer Intent for International Travel



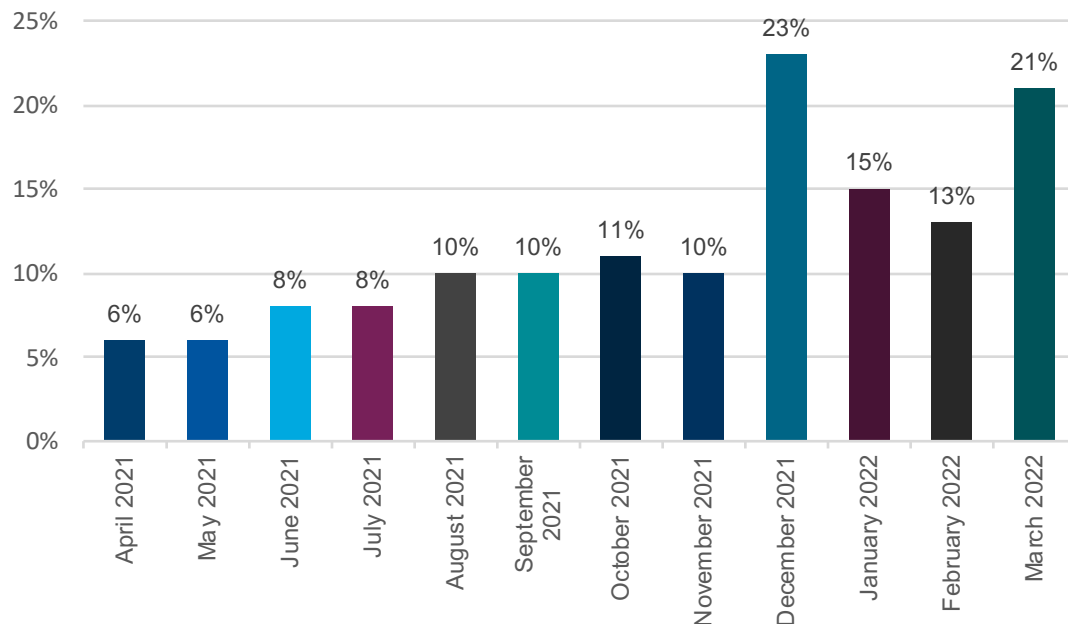
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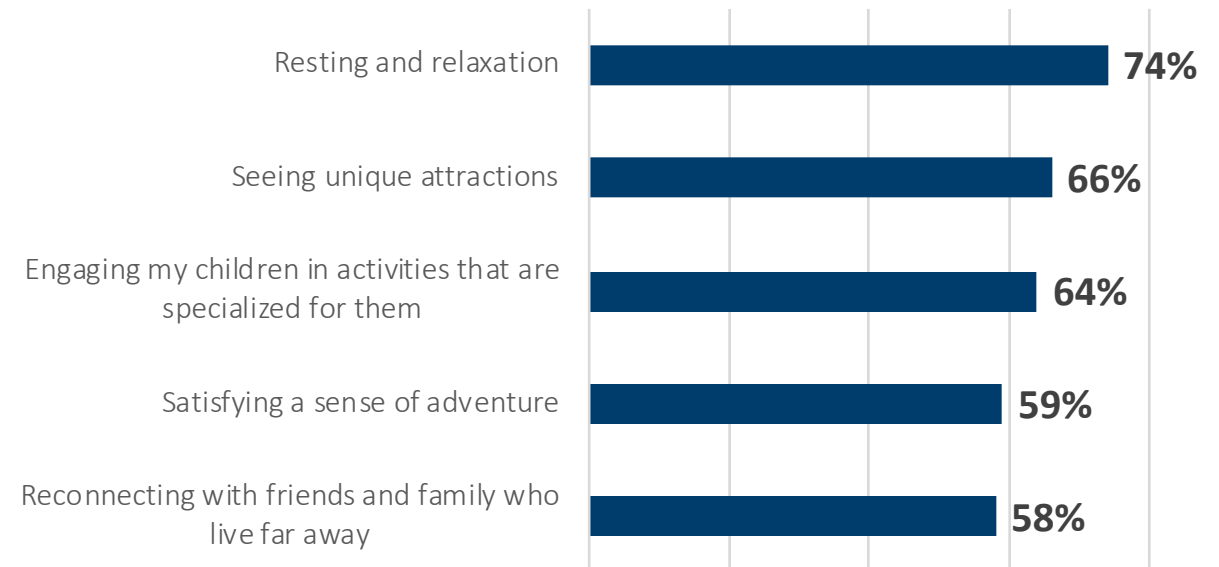
Australia: Planning & Considerations

Australian pushing international travel to end of 2021 and 2022 Q1

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



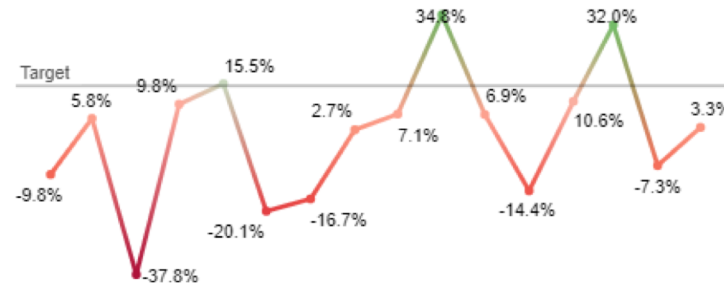
Australia: Gating Criteria

U.S. Entry Policy: Strict Restrictions

Google Trends

May Google Topics Index
85.0

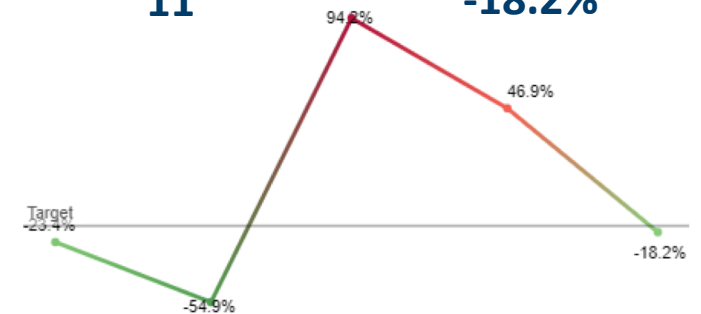
May - MOM % Change
3.3%



COVID Cases

Current Month
Daily Average
11

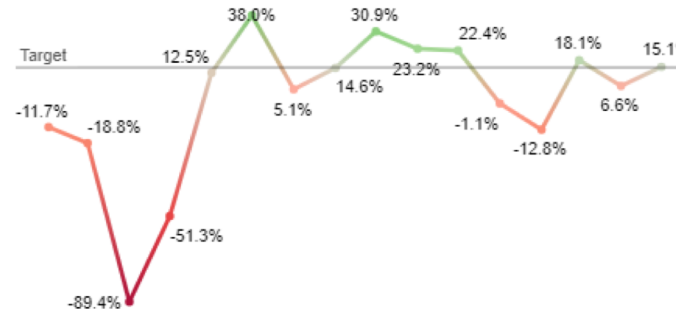
Daily Average MoM
Growth %:
-18.2%



Airline Schedule Capacity

May Airline Capacity
33,441

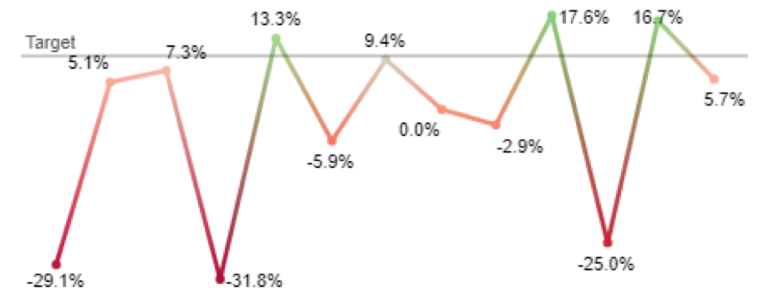
May - MOM % Change
15.1%



Consumer Intent for International Travel

April Intent for
International Travel
37.0%

April - MOM % Change
5.7%



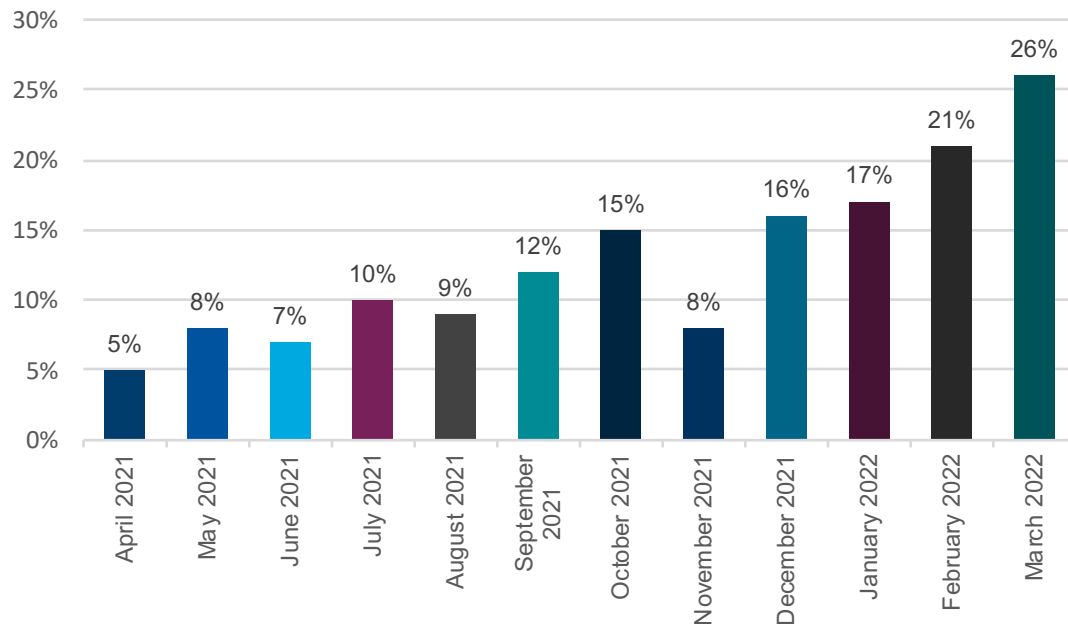
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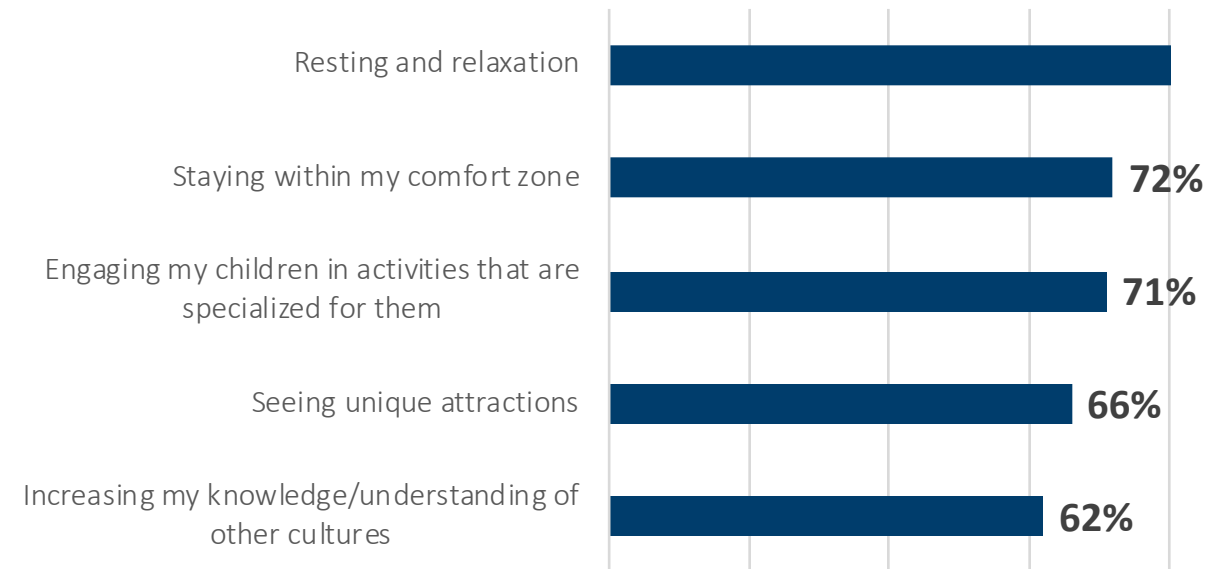
South Korea: Planning & Considerations

South Koreans' intent to travel internationally skews toward 2022 Q1

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



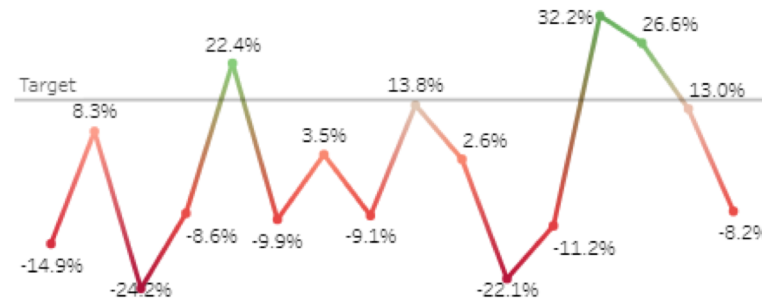
South Korea: Gating Criteria

U.S. Entry Policy: Relaxed Restrictions

Google Trends

May Google Topics Index
84.0

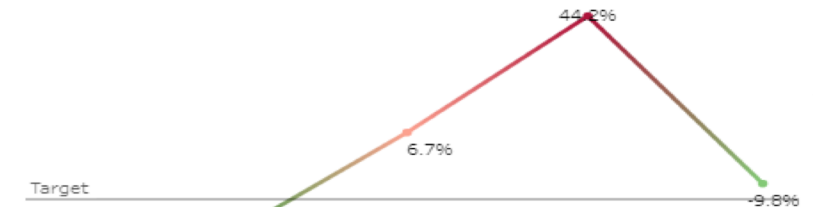
May - MOM % Change
-8.2%



COVID Cases

Current Month
Daily Average
439

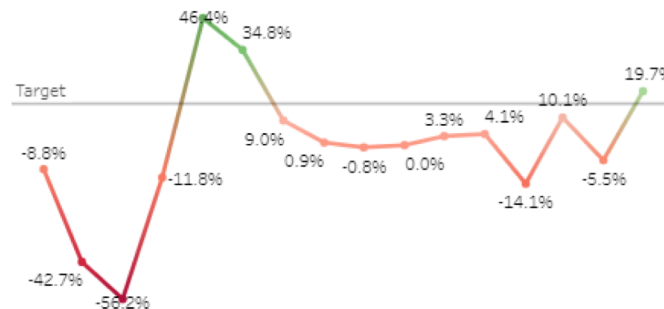
Daily Average MoM
Growth %:
-9.8%



Airline Schedule Capacity

May Airline Capacity
138,378

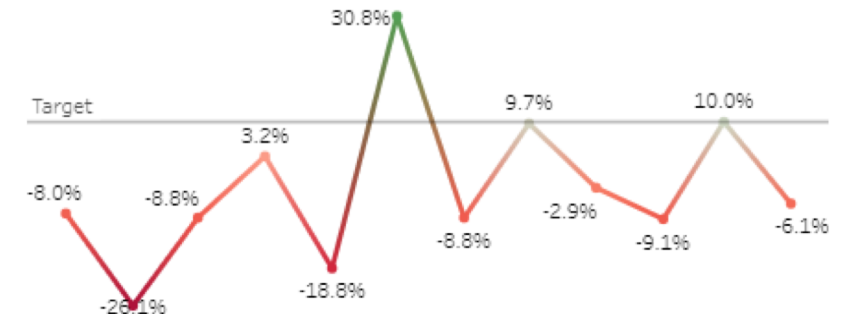
May - MOM % Change
19.7%



Consumer Intent for International Travel

April Intent for
International Travel
31.0%

April - MOM % Change
-6.1%



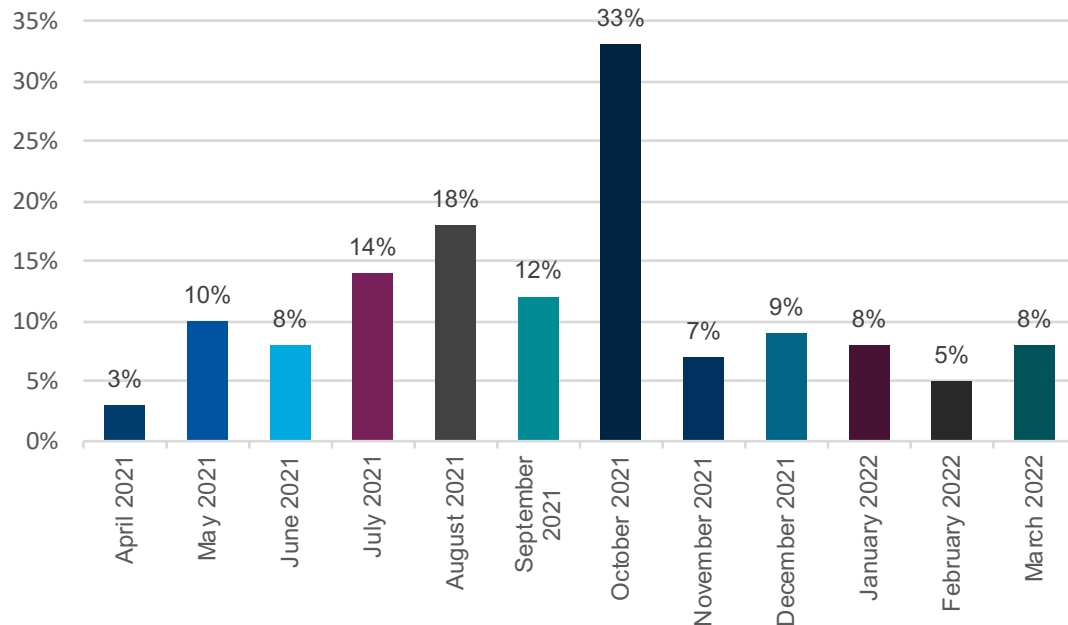
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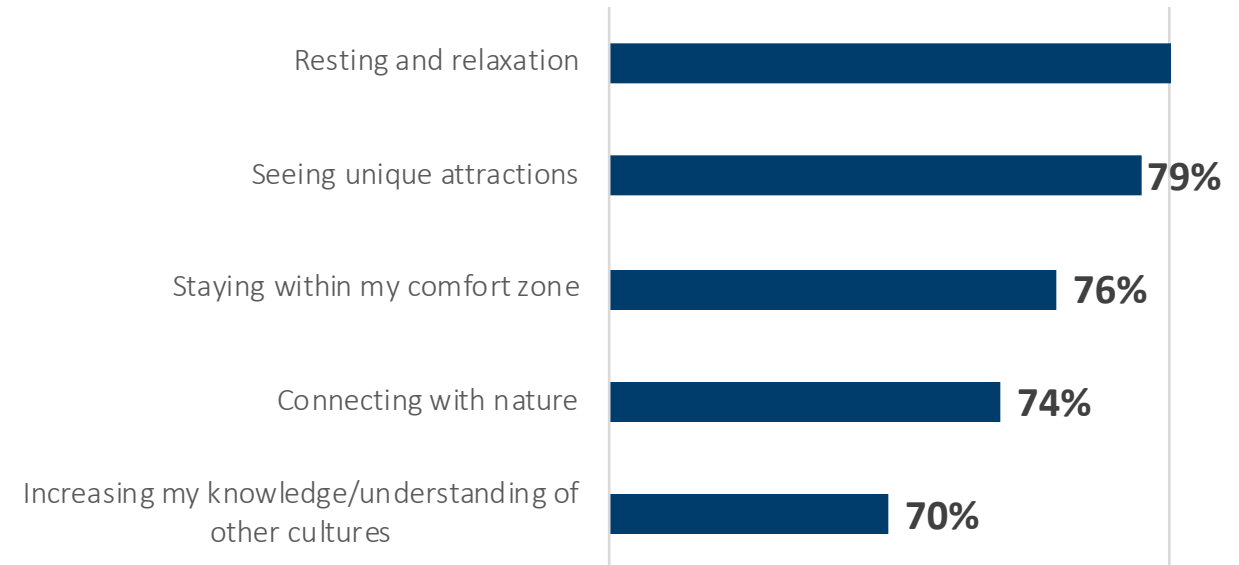
China: Planning & Considerations

Chinese are planning on traveling internationally during "National Day Golden Week"

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



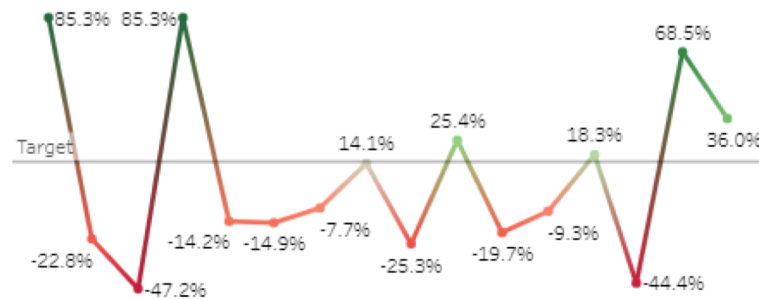
China: Gating Criteria

U.S. Entry Policy: Strict Restrictions

Google Trends

May Google Topics Index
51.0

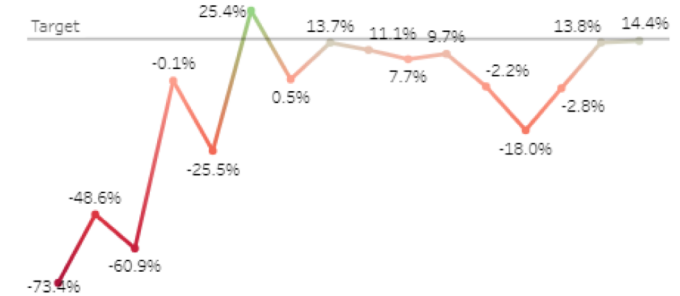
May - MOM % Change
36%



COVID Cases

Current Month
Daily Average
34,408

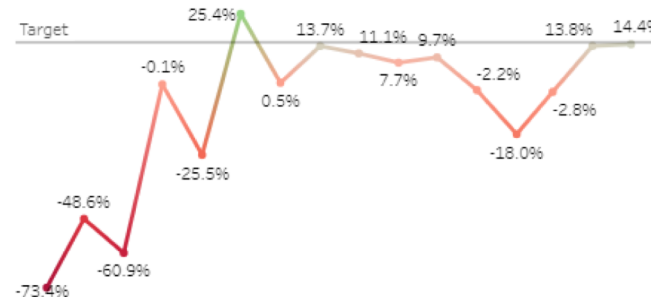
Daily Average MoM
Growth %:
14.4%



Airline Schedule Capacity

May Airline Capacity
34,408

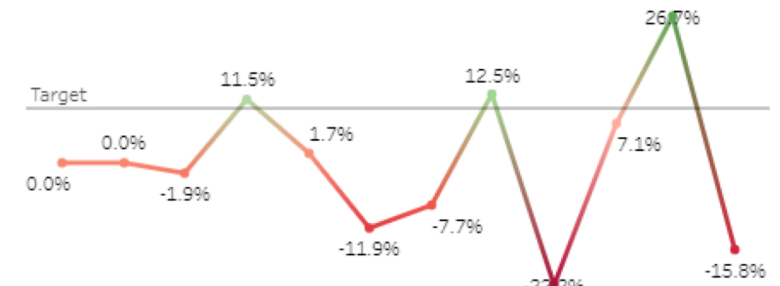
May - MOM % Change
14.4%



Consumer Intent for International Travel

April Intent for
International Travel
48.0%

April - MOM % Change
-15.8%



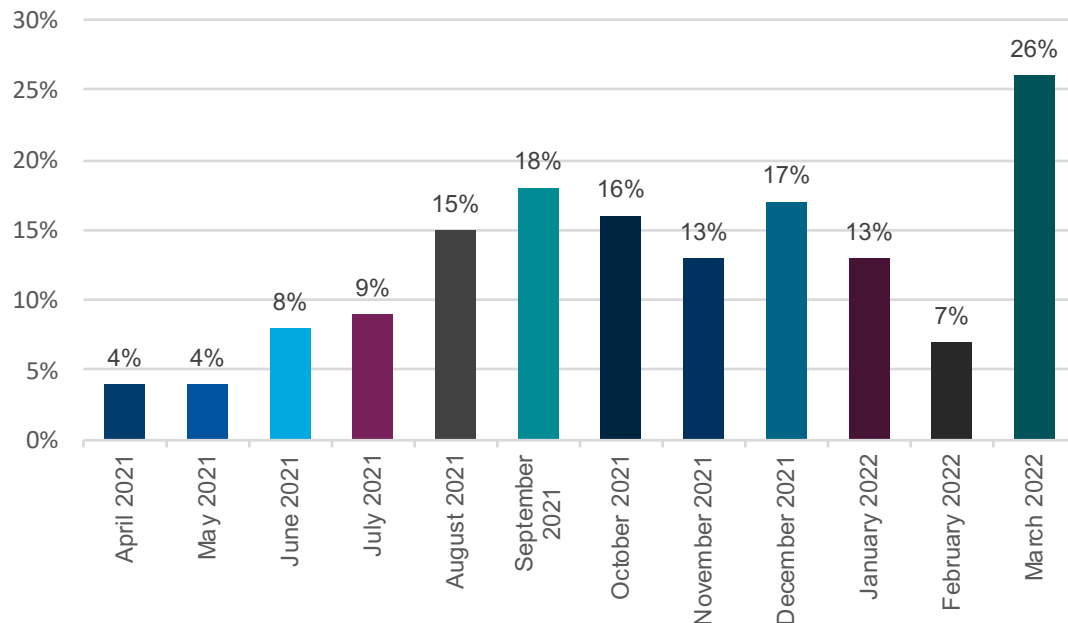
Source: thebrandusa.com/covid-19-indicator-dashboard

The Brand USA Covid-19 Indicator Dashboard is populated with data based on data from Google Trends, Sabre, Johns Hopkins, Government travel policies and Brand USA/Engine, custom study

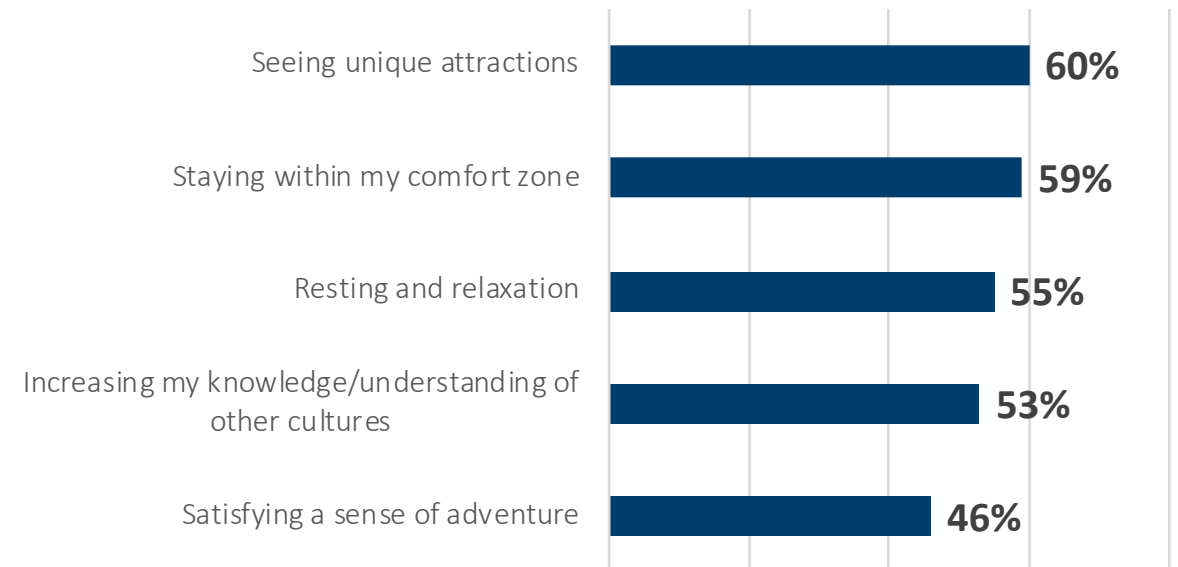
Japan: Planning & Considerations

Japanese international trip planning peaks on March 2022

International Trip Planning:
Departure Month in the next 12 months



Personal Considerations When Deciding
International Destination



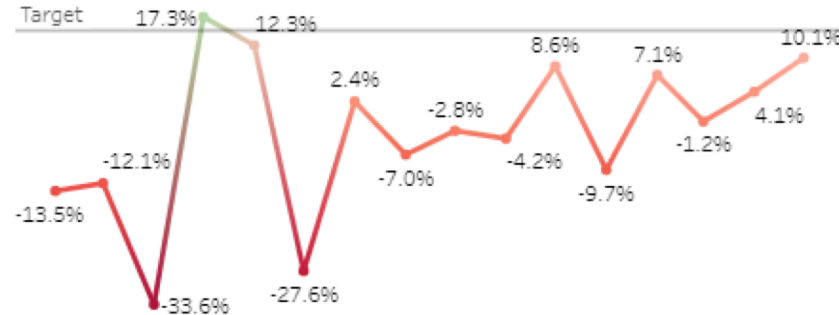
Japan: Gating Criteria

**U.S. Entry Policy:
Relaxed Restrictions**

Google Trends

May Google Topics Index
49.0

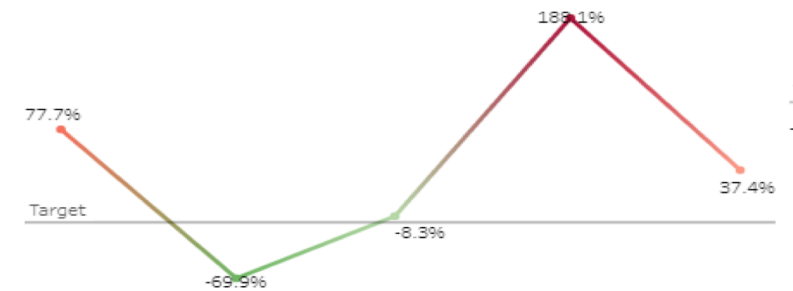
May - MOM % Change
10.1%



COVID Cases

Current Month
Daily Average
1,373

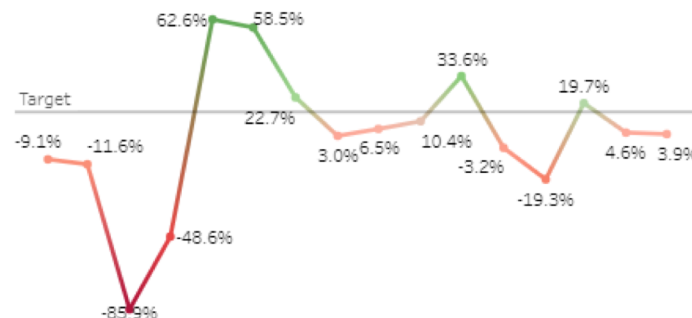
Daily Average MoM
Growth %:
37.4%



Airline Schedule Capacity

May Airline Capacity
156,695

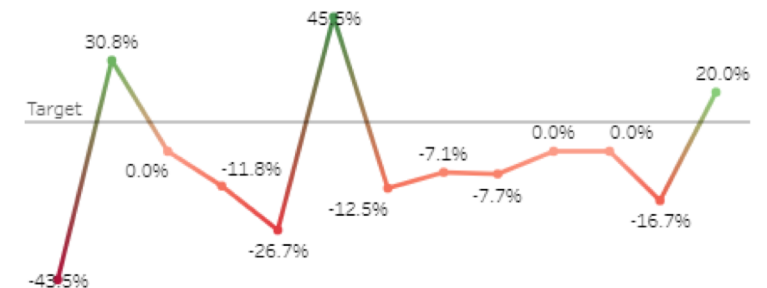
May - MOM % Change
3.9%



Consumer Intent for International Travel

April Intent for
International Travel
12.0%

April - MOM % Change
20.0%



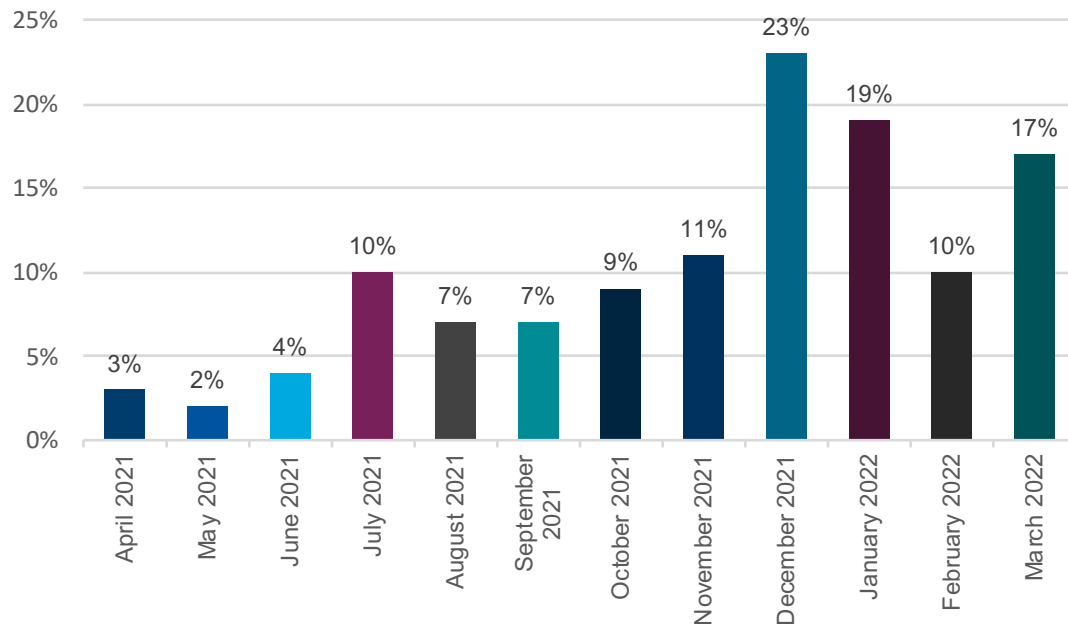
Source: thebrandusa.com/covid-19-indicator-dashboard

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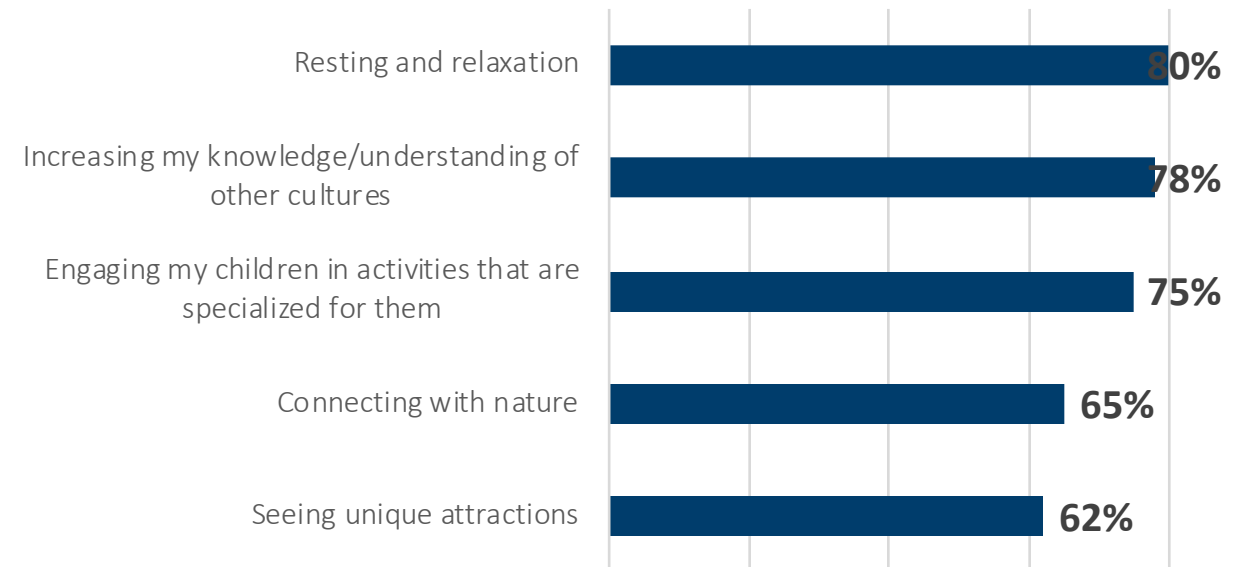
Brazil: Planning & Considerations

Brazilians' intent to travel during the 2021 winter holidays is high

**International Trip Planning:
Departure Month in the next 12 months**



**Personal Considerations When Deciding
International Destination**



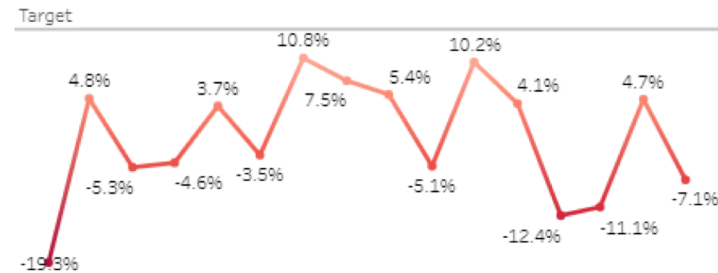
Brazil: Gating Criteria

U.S. Entry Policy: Strict Restrictions

Google Trends

May Google Topics Index
72.0

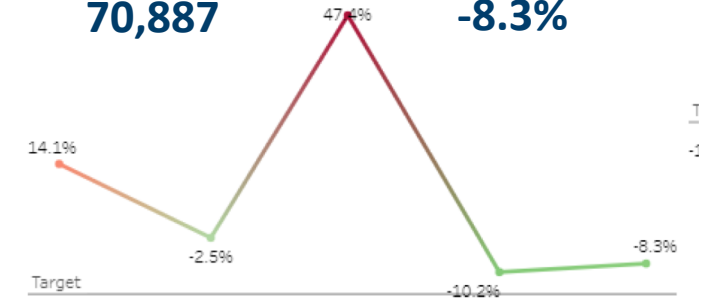
May - MOM % Change
-7.1%



COVID Cases

Current Month
Daily Average
70,887

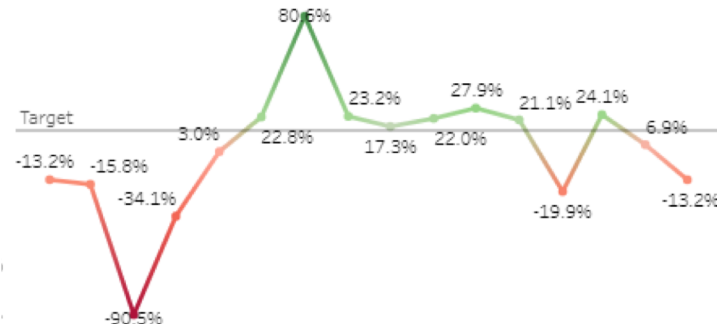
Daily Average MoM
Growth %:
-8.3%



Airline Schedule Capacity

May Airline Capacity
72,731

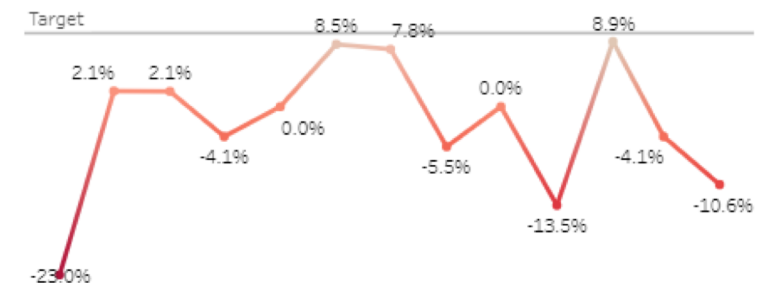
May - MOM % Change
-13.2%



Consumer Intent for International Travel

April Intent for
International Travel
42.0%

April - MOM % Change
-10.6%



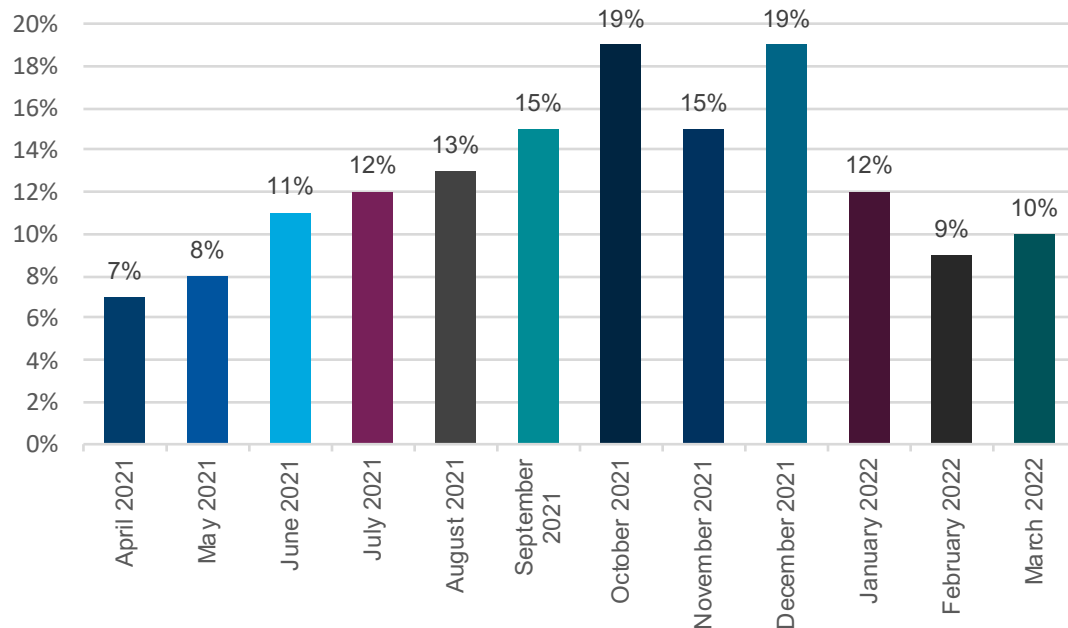
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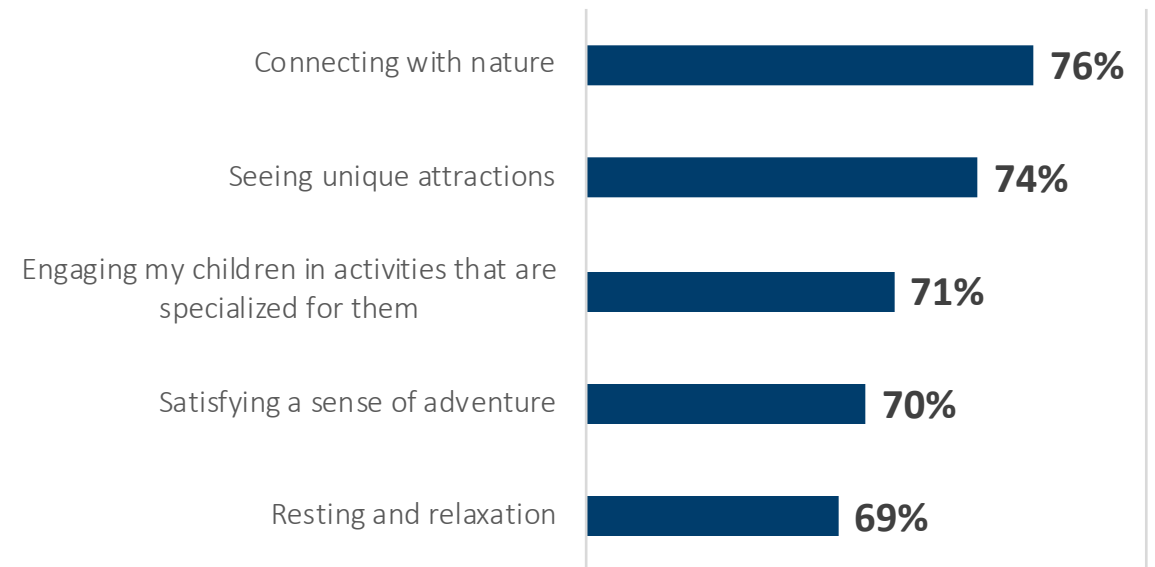
India: Planning & Considerations

Indian international travel planning is high for October and December 2021

**International Trip Planning:
Departure Month in the next 12 months**



**Personal Considerations When Deciding
International Destination**



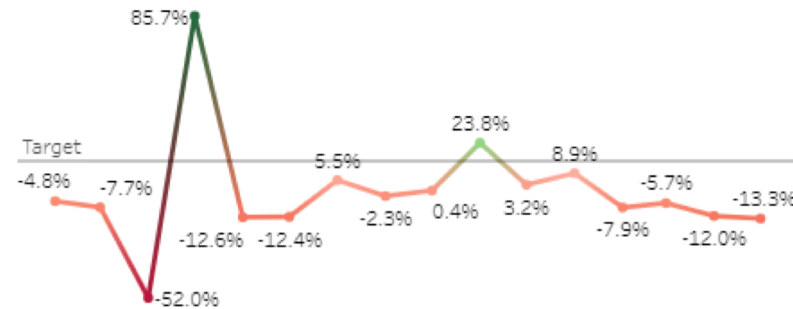
India: Gating Criteria

U.S. Entry Policy: Strict Restrictions

Google Trends

May Google Topics Index
54.0

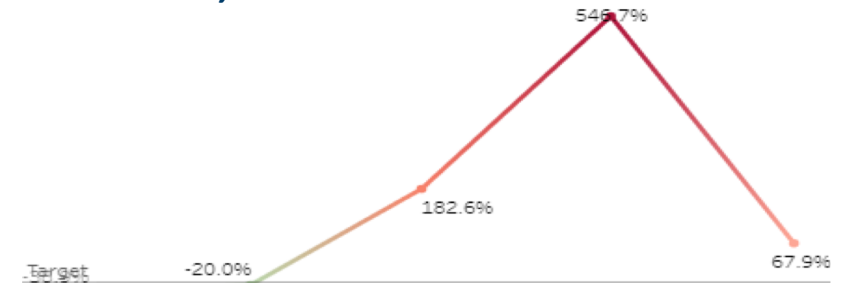
May - MOM % Change
-13.3%



COVID Cases

Current Month
Daily Average
35,788

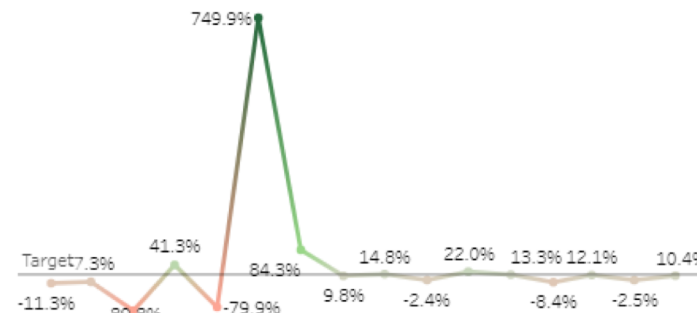
Daily Average MoM
Growth %:
67.9%



Airline Schedule Capacity

May Airline Capacity
82,488

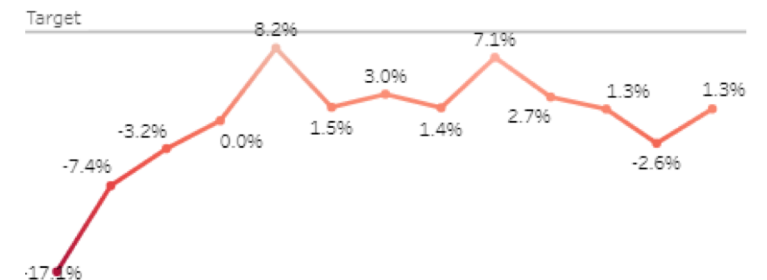
May - MOM % Change
10.4%



Consumer Intent for International Travel

April Intent for
International Travel
77.0%

April - MOM % Change
1.3%



Source: thebrandusa.com/covid-19-indicator-dashboard

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VisitTheUSA.com

Brand USA

Partner Programs for Recovery

May 12, 2021



Brand USA Recovery Co-ops

New Partner Opportunities

EDUCATE

TRAVEL TRADE OUTREACH

Reinvigorate existing relationships and build new ones by engaging and educating buyers about innovative programs.

PROGRAMS

NEW VIDEO: DESTINATION 101
CUSTOMIZED TRAINING VIDEOS

GLOBAL MARKETPLACE
RENEWALS & EVENTS

USA DISCOVERY PROGRAM

INSPIRE

DESTINATION READINESS

Update existing content or develop new content to instill confidence in consumers beginning to consider travel.

PROGRAMS

NEW INFLUENCER CO-OP CAMPAIGN

NEW VIDEO: SOCIAL CUTS

NEW 2022 GLOBAL INSPIRATION
PROGRAM

WEBSITE CONTENT UPDATES

ACTIVATE

STORYTELLING & ACTIVATION

Create demand through relevant, targeted campaigns that lead to measurable bookings across multiple channels.

PROGRAMS

NEW AIRLINE PARTNERSHIPS

NEW TOUR OPERATOR PROGRAM

MULTI-CHANNEL CAMPAIGNS

MARKET SPECIFIC PROGRAMS

AFFINITY PROGRAMS

BRAND USA RECOVERY PROGRAM



EDUCATE

Travel Trade Outreach

Key Factors

- Evolving travel trade landscape, needs alternate ways to reach key buyers
- The trade needs to be ready with reliable content, helps to build the consumer confidence
- Strong interest in traveling beyond the gateways and supporting local business
- Virtual platforms require new content and tools

EDUCATE

Travel Trade Outreach

New Partner Opportunities

- **Destination 101: Customized Training Videos for the Travel Trade**

Educate the travel trade with new engaging content and use for training sessions.

Distribution available on USA Discovery platform, Global Marketplace and partner's owned channels; includes interactive interface to connect to most up-to-date information

- **Global Marketplace Renewals and New Partner Opportunities**

1:1 meetings with buyers, captivating content and events, and 24/7 access to engage virtually



INSPIRE

Destination Readiness

New Partner Opportunities

- **Consumer Influencer Co-Op Campaign**
Multi-state road trip itineraries; new, up-to-date content with inspiring influencers from around the world
- **Video Social Cuts with Distribution**
Quick to market utilizing existing footage to showcase destinations with wide open spaces and no crowds; includes distribution in key recovery markets
- **Re-imagined Global Inspirational Program**
Digital-first approach, measurable results; digital hub launches in February 2022, print in May 2022; market-specific targeting with global reach



INPIRE

Destination Readiness

Key Factors

- Consumers want assurance that destinations are ready to safely welcome visitors
- Influencers and online video are top sources of trusted travel content
- With expected pent-up demand, there is a need to create awareness for U.S. destinations as top choices
- Partner resources are limited for production and marketing, but we need to return to international markets quickly to influence travel decisions when timing is right





ACTIVATE

Storytelling & Activation

Key Factors

- Many markets are demonstrating optimism for increased international travel. Focus on markets that will recover first and generate bookings
- Planning future trips makes consumers feel happy and hopeful
- Stimulate as much interest in U.S. destinations with reliable content, builds confidence for consumers to convert to bookings as quickly as possible
- Seeking low-cost, high-value opportunities with measurable results

ACTIVATE

Storytelling & Activation

New Partner Opportunities

Airline Partnership: Air Canada

In partnership with “USA Open Now” promotion – August 2021 launch

Tour Operator Co-Ops

- **UK:** British Airways Vacations and Trailfinders
- **Germany:** Canusa
- **Mexico:** Price Travel

Affinity: Expedia, Tripadvisor and Sojern

Amplify reach with key OTA partners; quick to market

Market Specific: Leading Local Media Partnerships

- **Canada:** Rogers Media – broadcast and digital channels
- **Mexico:** Televisa – pay TV/broadcast, digital and social channels

Restart Multi-Channel

Timing preferences and refreshed content

- **Brand USA Recovery Program**

Content and retargeting opportunities are being developed with tour operators and OTA as aCTA



Closing

As we welcome the return of international tourists, we will continue to monitor all these markets based on the gating criteria to :

- Resume our marketing activities effectively
- Adjust the prioritization of countries based on market conditions and consumer intent

Understanding that there is still a lot of uncertainty, we will continue to provide you with practical advice and opportunities.

Questions?