



BRAND USA INTERNATIONAL MARKET UPDATE

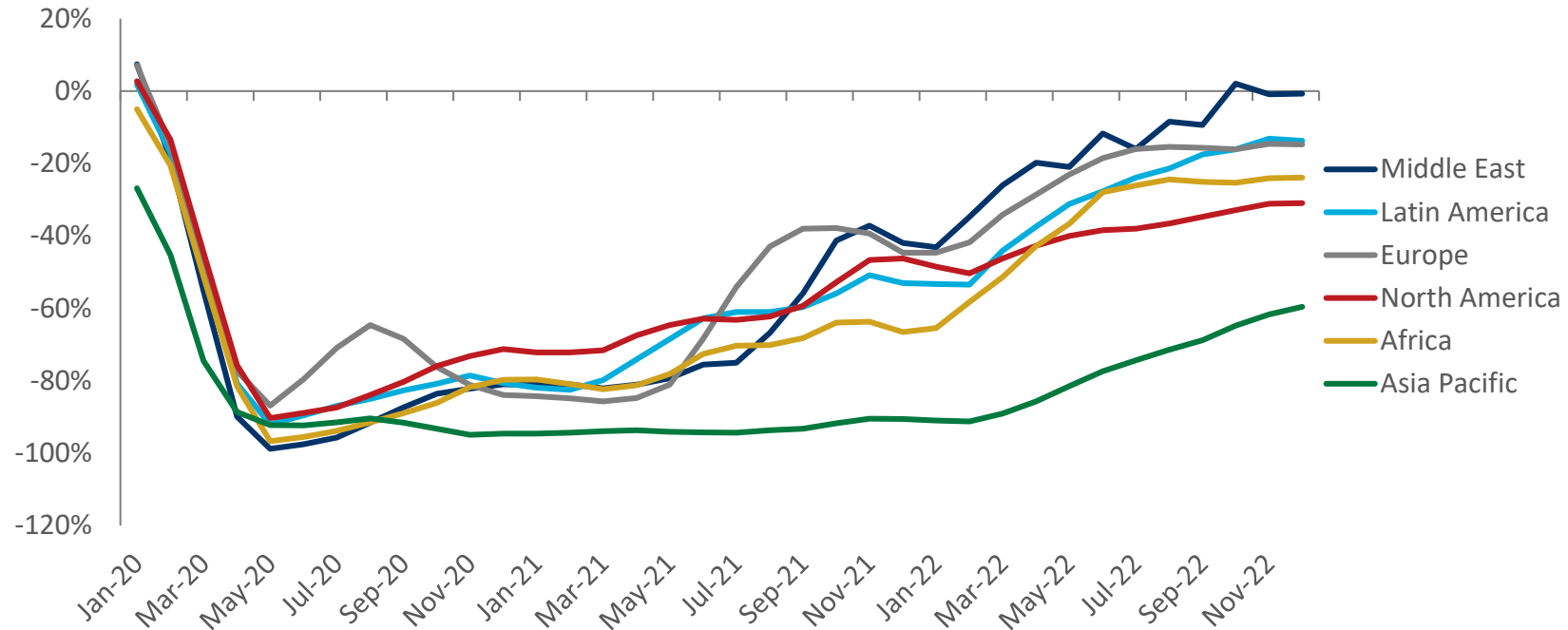
February, 2023

TRAVEL OUTLOOK

2022: Strong Rebound in Travel Activity

International tourist arrivals by region

% of 2019 levels, 3mth rolling avg



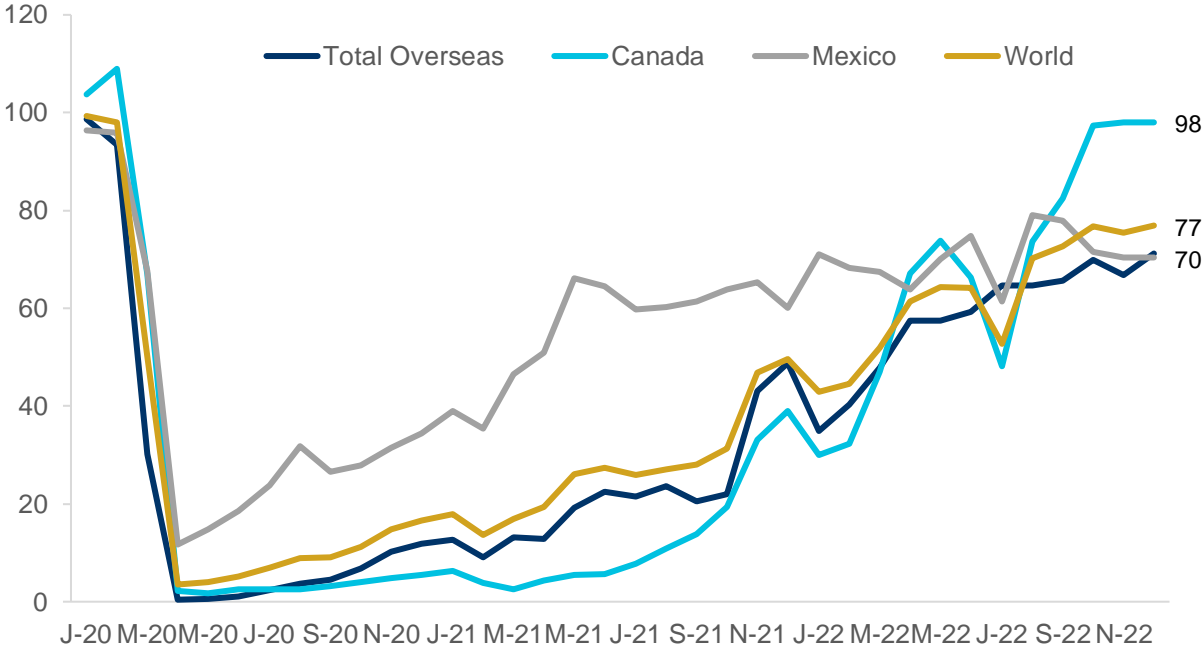
Source: UNWTO

Source: Tourism Economics



2022: The USA Experienced a Similar Rebound

International visits to USA
2019 = 100 (same month comparison)



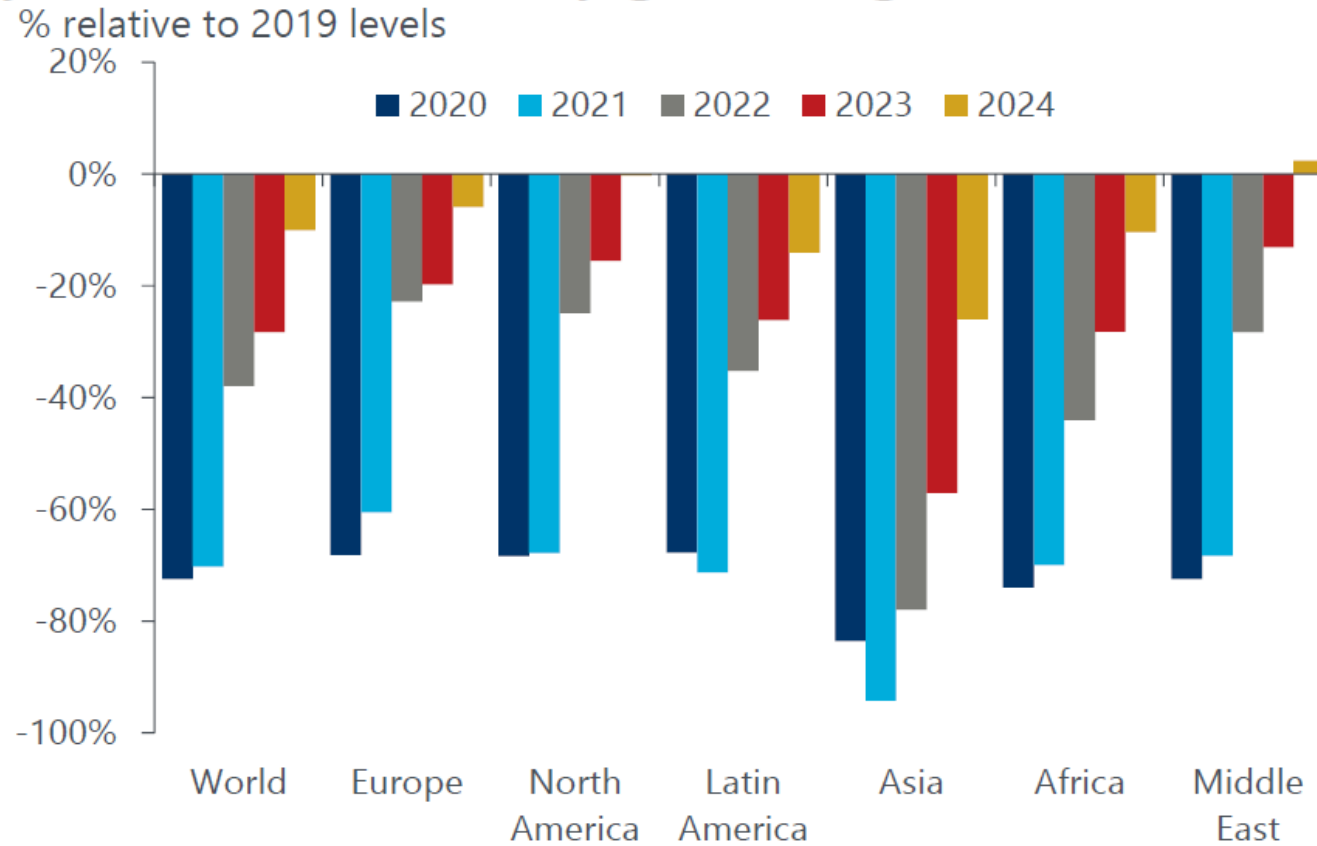
Source: NTTO

Source: Tourism Economics



2023: Global Travel Will Show Resilience

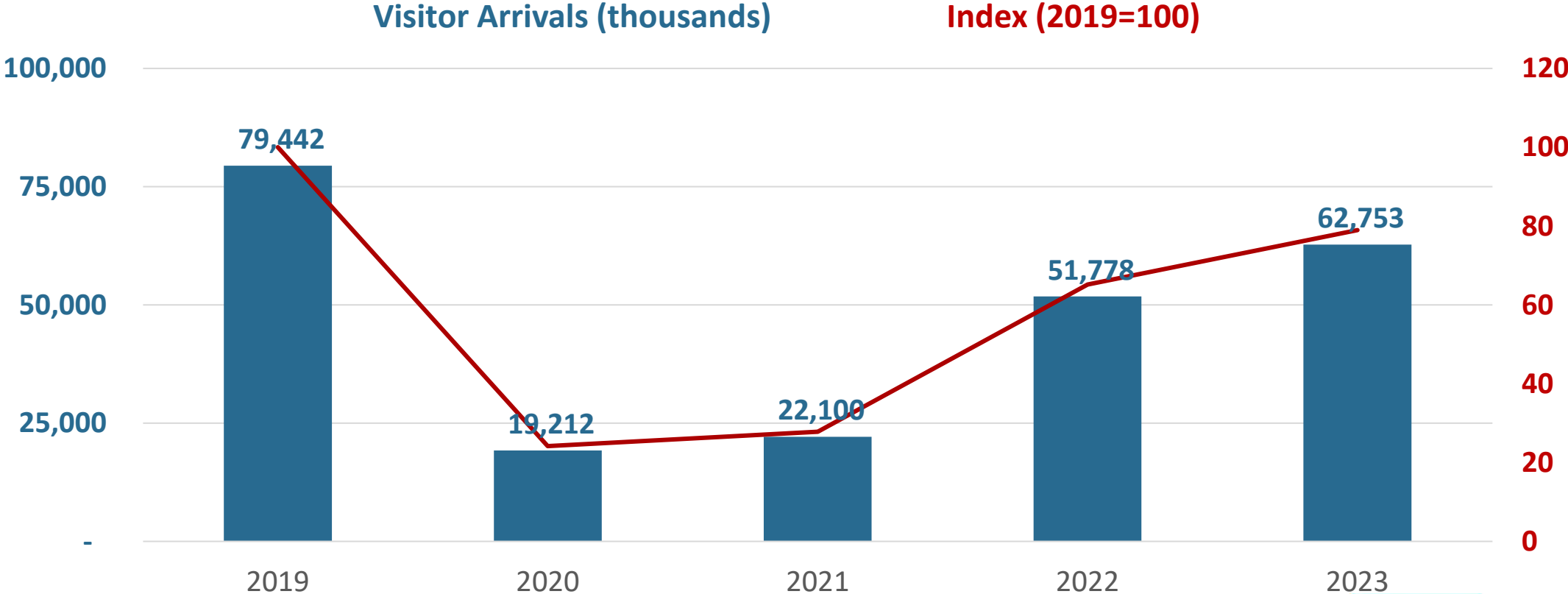
Travel recovery relative to 2019 – by global region



Source: Tourism Economics



2023: USA Total Visitor Arrivals

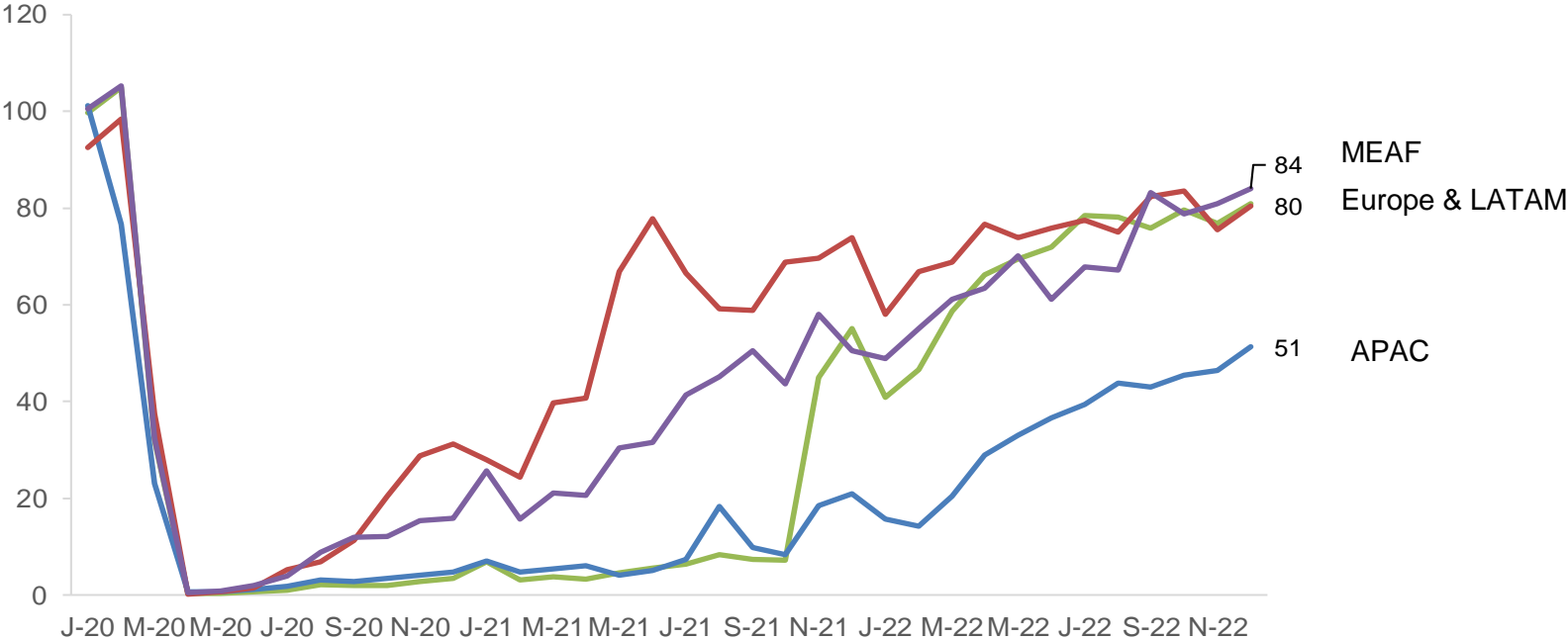


Source: NTT



2023: Asia Will Remain Behind, but Striving

International visits to USA
 2019 = 100 (same month comparison)



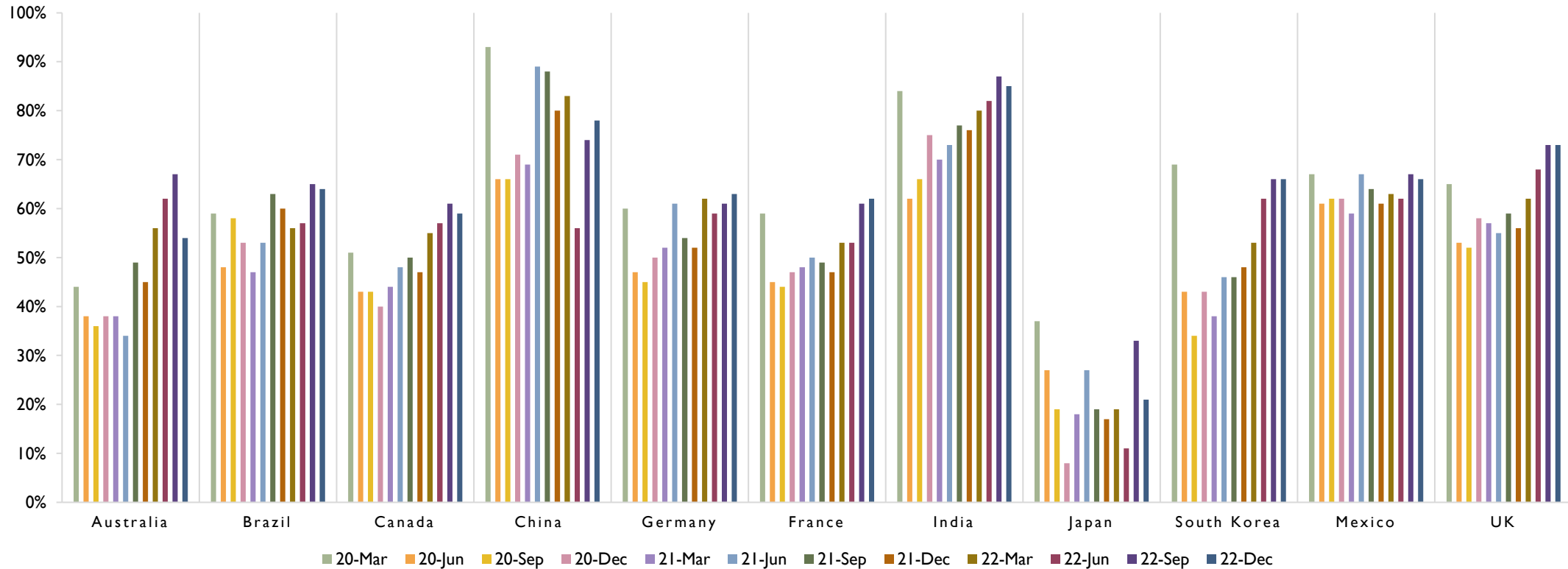
Source: NTT

Source: Tourism Economics



CONSUMER SENTIMENT

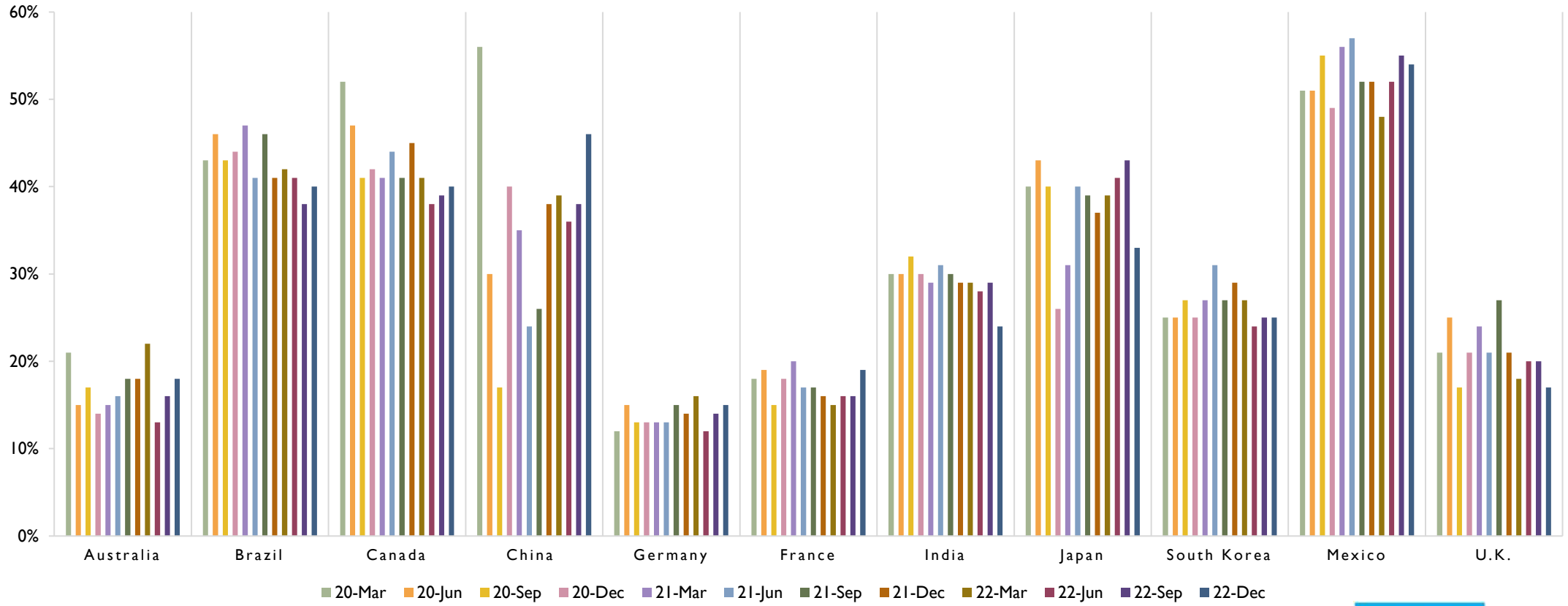
Likelihood to Travel Internationally in the Next 12 Months



Base: All respondents
 Source: Brand USA/Big Village Quarterly Study



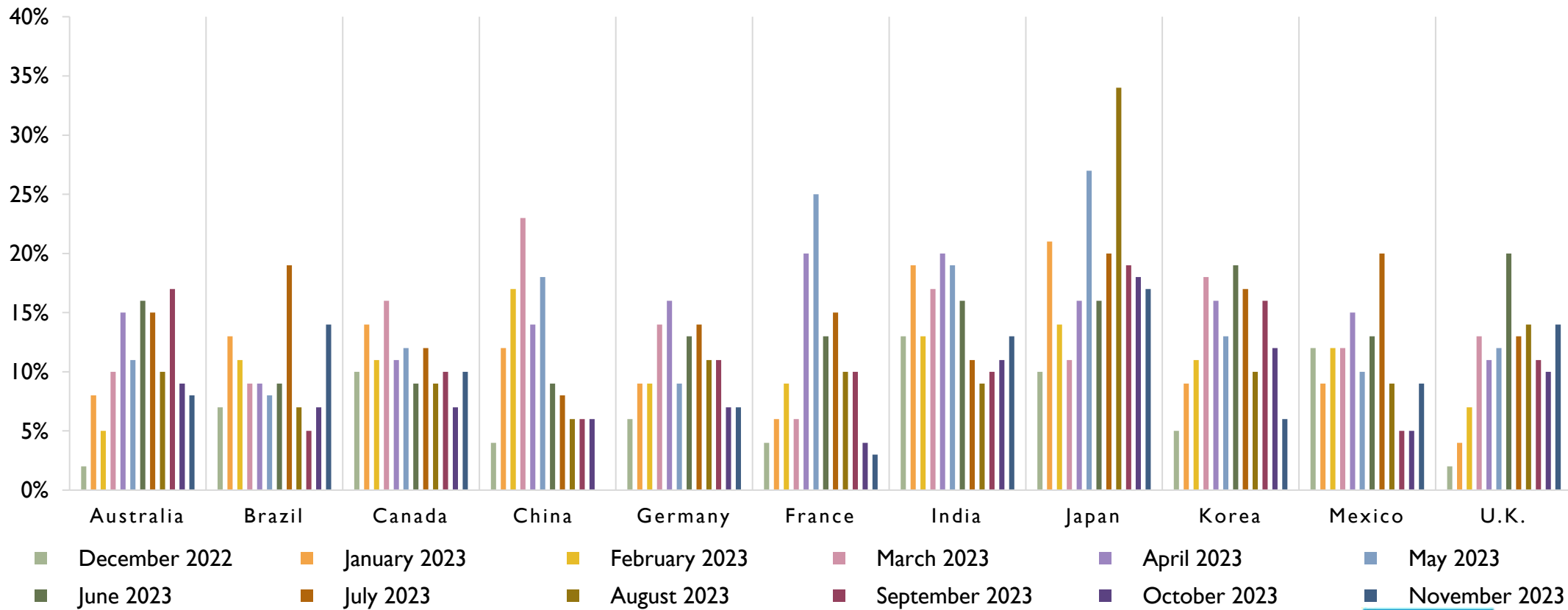
Likelihood to Travel to USA in the Next 12 months



Base: All respondents
 Source: Brand USA/Big Village Quarterly Study



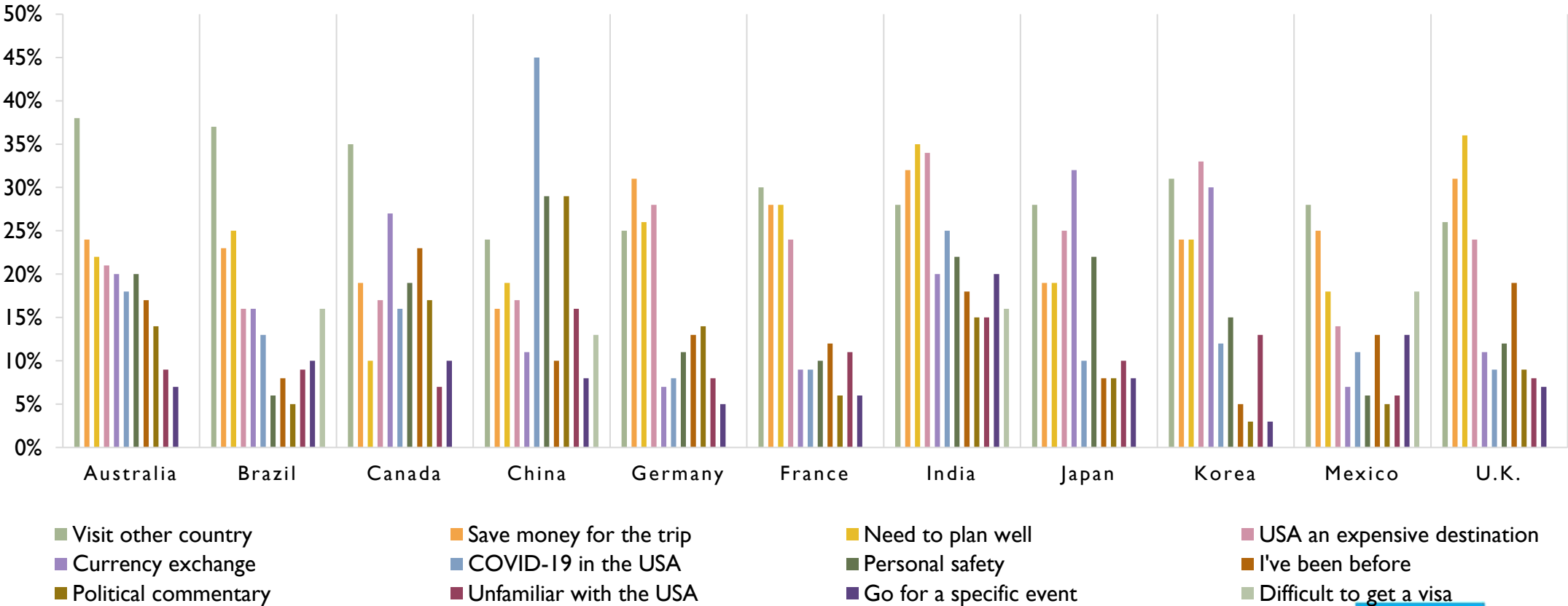
International Trip: Planning Departure Month



Base: Respondents who are likely to take an international trip in the next 12 months
 Source: Brand USA/Big Village Quarterly Study, December 2022



Reasons for Not Traveling to the USA in the Next 12 Months



Base: Respondents who are unsure/unlikely to take an international/a foreign holiday in the next 12 months but it won't be to the U.S
 Source: Brand USA/Big Village Quarterly Study, December 2022





THANK YOU!