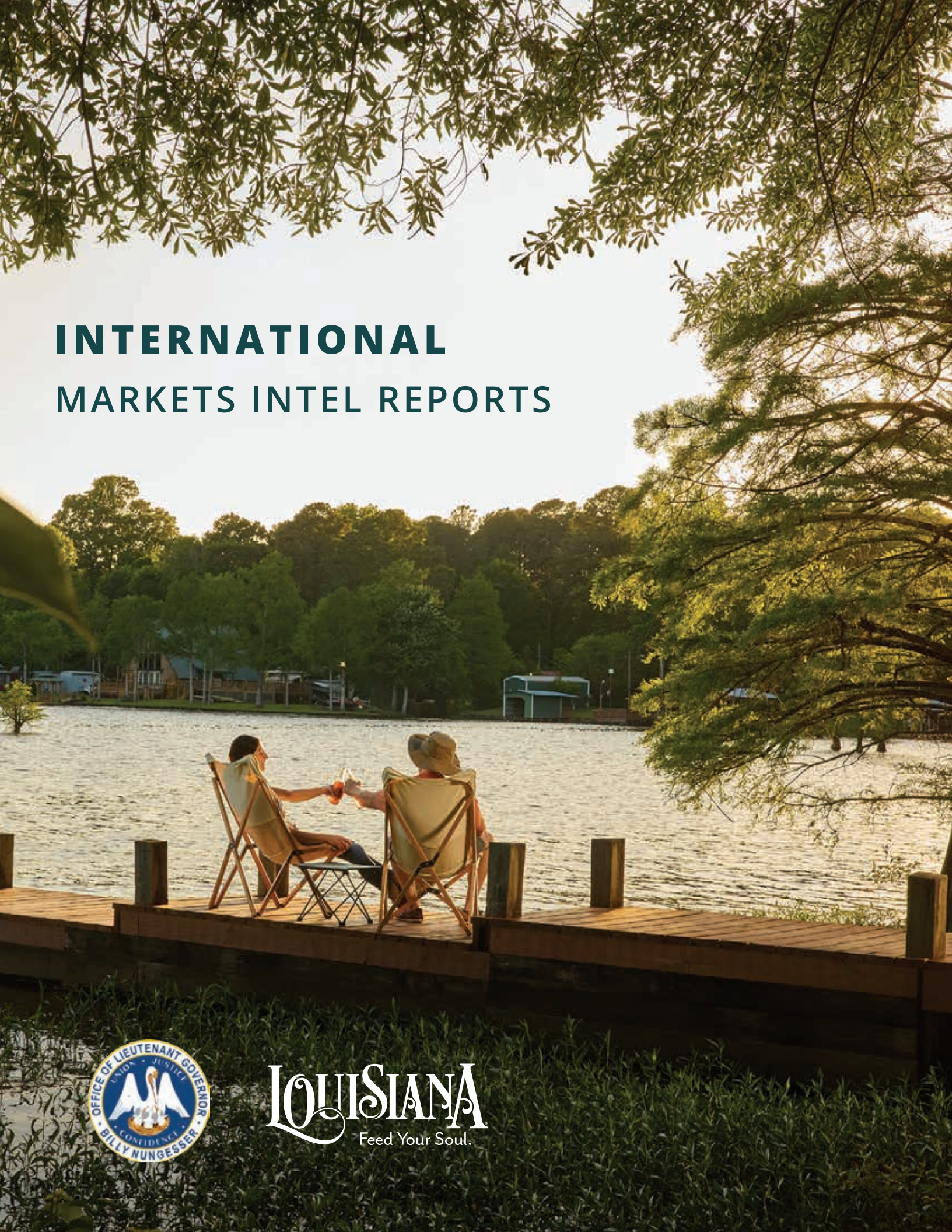
INTERNATIONAL

MARKETS INTEL REPORTS



AUSTRALIA/ NEW ZEALAND

MARKET OVERVIEW

Official language is **English**

+

Australian Population **26mil**

New Zealand Population **5mil**

+

Rising interest rates and inflation not impacting high travel demand

+

Consistently one of the **Top 10** long haul markets into the USA

GETTING HERE

United, Delta, Qantas, American Airlines, Air New Zealand and Fiji Airlines all fly into the USA from Australia and New Zealand

Qantas direct flight Melbourne to Dallas 3 times per week. Qantas flight daily Sydney to Dallas and 3 times per week Melbourne to Dallas

United Airlines direct flight Sydney to Houston 3 times per week

Average booking window is 6-8 months with Jan – March the peak booking period

THE TRAVELER PROFILE

Travel for an average of 12 days to the US

55% of travelers use OTAs and 47% use Travel Agencies

Fly/Drive is very popular

Adventure explorers seeking authentic experiences

41% are seeking local cultural experiences

Australians are the biggest global spenders on nightlife and experiences

63% prioritise destinations with vibrant food experiences

MARKET TRAVEL TRENDS

Long haul isn't long haul to them

They go beyond the gateways chasing off the beaten path activities

46% visit multiple destinations in one trip

Saving to Splurge. 50% are investing in travel as a priority

Luxury for less – Choosing off peak for value

42% want to take a "Sport-scursion"

TRADE & MEDIA LANDSCAPE

Record profits and a booming travel industry

Luxury and independent tour operators are thriving

From rebuild to growth, travel agents continue to dominate

With 67 million weekly interactions, three in five readers engage with multiple news categories, highlighting diverse interests

In-house editorial teams are smaller and under pressure to save money. As a result, publishers rely on freelancers to write for multiple publications instead of having dedicated staff for each

CHALLENGES

The competition for the Australian traveler is fierce.
Destinations worldwide are heavily investing in the Australian market

LOOKING AHEAD

Australians and New Zealanders travel farther, stay longer, and spend more in the United States than many other inbound markets. Australians are a high spending market with an average spend per visitor of approx. $6,154 USD (2019)

Approximately three quarters (75%) of Australian travelers to the US are repeat visitors

AUSTRIA

MARKET OVERVIEW

Austria consistently ranks among the top countries for visitor arrivals to the US

Official language is **German**, with a dialect of Bavarian

Population is **9.2 Million**

Inflation 3.4%, Unemployment 5%

GETTING HERE

Austria offers 38 weekly flights to the US as well as a variety of connecting flights via Canada, Germany and Switzerland

Vienna is Austria's largest airport, followed by Salzburg, Innsbruck, Graz, Linz and Klagenfurt

Austria has around 2,400 travel agencies

THE TRAVELER PROFILE

Austrians love travelling. 73% of Austrians planned at least one trip in 2024, 39% planned two trips in 2024

Beach vacations and the search for peace and relaxation are still the main reasons for travelling. Visiting friends and relatives, recreation, culture, sight-seeing, shopping, city escapes and being active are top motivators

Short vacations (1-3 days) are more popular than longer trips (4 days and more)

MARKET TRAVEL TRENDS

US remains the most popular long-haul destination for Austrians

Slow tourism, health and culinary tourism are trending

In 2023, the Austrian resident population made 30.86 million trips with at least one overnight stay. 27.01 million of these were vacation trips and 3.85 million were business trips

6.5% of all vacation trips abroad in 2023 were long-distance trips

23.3% of all Austrians did not go on a vacation trip at all

TRADE & MEDIA LANDSCAPE

Austria is part of the Visa Waiver Program and can therefore easily enter the US with ESTA

26.7% of all Austrians book through travel agency or directly with a tour operator, 73.3% book independently (direct, OTA, Website, etc.)

Despite price increases, Austrians are not doubting the vacation itself. Instead, they are choosing cheaper accommodation (52%) and staying longer in one place (49%) avoiding multi-city trips

CHALLENGES

Travelers are concerned with price increases, and geopolitical conflicts

LOOKING AHEAD

Vienna airport recently reported a 12% increase of travelers to North America with a total of 59,811 travelers. The forecast for 2025 is similar volume of travelers

CANADA

MARKET OVERVIEW

Canada population **41 million**

86% of the population lives in four provinces: **Ontario, Quebec, British Columbia and Alberta**

Louisiana shares a **French cultural heritage** with Canadians, and they are prolific Louisiana travelers

Canada is Louisiana's top international market, led by Ontario and eastern French Canada

GETTING HERE

Air Canada offers Toronto to New Orleans non-stop direct flights - with 4 flights per week (M, W, F, Su)

Air Canada non-stop flights from Montreal to New Orleans is currently 2 flights weekly. Air Canada is suspending route for summer of 2025 due to operational issues

THE TRAVELER PROFILE

Canadian travelers are increasingly motivated by cultural experiences, seeking unique adventures

Spending remains exceptionally strong rising 30% above pre-pandemic levels

Travelers are interested in unique, tech-free trips that allow them to disconnect and immerse themselves in their surroundings. There's a strong emphasis on creating memorable experiences, motivating travelers to explore new destinations and activities

When making travel choices: 86% prioritize cost savings and exclusive deals, 74% seek destination variety and uniqueness, 57% value personalization and customization

MARKET TRAVEL TRENDS

Canadians are searching for Multi-experience trips (47%): diverse experiences that combine urban, beach, or culture. Shopping is at the top of their list. Nature (46%): exploring national parks, hiking trails, and scenic landscapes; Food (38%) from street food to fine dining; Beach (34%): sun, sand and surf; Cultural experiences (33%): local traditions and history; Hidden Gems (32%): beyond typical hotspots

Safety remains a top concern for the Canadian traveler

Social media and cultural phenomena like TV shows continue to heavily influence travel plans

TRADE & MEDIA LANDSCAPE

Traditional media continues to be a support pillar by the travel industry in Canada, disseminating information through print, TV, radio and on-line channels

The travel industry in Canada is shaped by 4 major travel associations, 18 travel agency chains and consortia

Over 35 tour operators and wholesalers offer Louisiana travel product. These organizations play a key role in connecting Canadian travelers with Louisiana

Social media and influencers are driving aspirations of travelers

CHALLENGES

The cost of living and economic concerns remain significant, affecting travel decisions and destinations

Increasing consideration for the environmental impact of travel. Sustainable travel options are a priority

Some travelers may delay their plans to see how political changes may affect currency exchange rates, international relations, hot-button issues/ policy changes or travel regulations, or decide to visit destinations where elected officials are more aligned with their own beliefs

LOOKING AHEAD

The USA continues to be a top destination for Canadians, with 59% of all outbound trips in 2024 being to the USA

Canadian visitors, including air and land arrivals to the United States, reached 2.5 mil in 2023

FRANCE

MARKET OVERVIEW

Population is **68mil** making it the 3rd-most populated country in the European Union

France is the **7th largest economy** in the world

France is the 6th inbound market to the US with **1.4 mil** French visitors in 2024

26% of French travelers are likely to travel to the US in the next 2 years

GETTING HERE

AIR FRANCE: via Atlanta, Boston, Chicago, Dallas, Detroit, Minneapolis, New-York, Raleigh, Durham

AMERICAN AIRLINES: via Chicago, Dallas, New York, Philadelphia

DELTA AIRLINES: via Atlanta, Boston, Cincinnati, Detroit, Minneapolis, New-York, Raleigh

UNITED AIRLINES: via Chicago, New York, Washington DC

BRITISH AIRWAYS: via London (UK)

AIR CANADA: via Toronto (CAN)

THE TRAVELER PROFILE

Trip insurance is a priority

Trips are planned further ahead

Travel more often but shorter to spread holiday budget

Travel decisions are based on recommendations by a relative, TV/series or social media (Instagram, TikTok)

More people rely on travel operators for best advice and assistance during their trip

39% stay 7-13 nights, 36% stay 14-20 nights, and 9% stay 21+ nights

MARKET TRAVEL TRENDS

Eco-Friendly trips are increasingly in high demand

Discovering a new culture & reconnecting with traditions is important

Top 5 Motivators:
57% Cultural & Historical Attractions
56% Urban Attractions
52% Local Lifestyle
48% Dining & Gastronomy
45% Beaches & Seaside

Travel party:
50% couples
38% family
12% solo travel

TRADE & MEDIA LANDSCAPE

95% of French people read at least one press brand every month

1 out of 4 French people like to read their newspaper every day

89% of French people believe that today there is false information on the internet and social media

According to the Reuters Institute, the "younger generations," who have grown up with social networks, often pay more attention to influencers or celebrities than to journalists

CHALLENGES

The uncertain domestic and international geopolitical climate including concerns about travel safety, tax increase, fluctuating exchange rates, and increasing fuel cost affect travel decisions

Costs of travel increasing in the USA (especially food & restaurants) impacting on-site budget

Travel agencies & tour operators: constant turn-over and continuous need to train staff members to maintain up-to-date destination knowledge

LOOKING AHEAD

Nature Lovers:
The desire to go back to basics and wide-open spaces

73% of French visitors to the USA are repeat travelers

Increased interest in sporting events and eco-friendly travel

GERMANY

MARKET OVERVIEW

Germany is the **7th largest country** in Europe and the **third largest in population**

Official language is **German.** 67% of all Germans speak one foreign language.

Total population is approximately **84.4 Mil**

Germany has the **largest economy in Europe** and the **third-largest in the world**

GETTING HERE

The major airports with non-stop connectivity to the USA are: Frankfurt, Munich, and Berlin

All three airports have non-stop connectivity to the US

Hubs like New York, Chicago, Washington DC, Charlotte, Atlanta, Dallas, and Houston are used to continue to New Orleans or other cities in the South

Around 10,000 travel agencies can be found in Germany and 86.3% of all agencies have their own agency website

Personal contacts are the main source for travel inspiration, followed by print and online inspiration

THE TRAVELER PROFILE

Germans are considered travel champions. With an average of 28 paid vacation days and a desire to travel more than any other nation

The USA is the most popular long-haul destination for Germans. Germans stay an average of 12 days in long-haul destinations

Booking through travel agents has been on the rise in recent years as a result of major tour operator and airline bankruptcies

Fly-drives and RV vacations are still preferred and are the most common way to travel within the US

MARKET TRAVEL TRENDS

Although the German traveler wants more environmentally friendly options, they rarely book green and socially responsible vacations

Early bird booking patterns are increasingly returning

Cruise vacations are trendy for families

Travelers find the Southern part of the US less expensive as secondary destination options

Special event travel, such as sporting events, concerts, bachelor/bachelorette are still in demand

TRADE & MEDIA LANDSCAPE

Approximately 1.8 million Germans traveled to the USA in 2023

Affiliated media/tour operator marketing is increasing. More than 80% of travel agencies now do their own marketing. The most popular communication channel is social media

Tour Operator updates: *FTI Touristik filed for bankruptcy in 2024. *DERTouristik is now DERTOUR *Dertour and Meier's Weltreisen are separate brands

Movies and TV shows are still trend setters for vacation destinations

CHALLENGES

The USA in general too expensive and is less competitive than other destinations. Air fares remain high

Travel agencies are struggling with profits and forecasting staff shortages in the near future

LOOKING AHEAD

Interest in spending more time outdoors. Eco-friendly travel choices are increasingly important

As a result of the hot summers in recent years, holiday makers are increasingly on the lookout for weather friendly destinations

INDIA

MARKET OVERVIEW

The population is 1.4 billion

32.6% Millennials, 27% Gen Z

India is the world's 5th largest economy

English is the business language. **Hindi** and **English** are the most common languages used

India is the second largest overseas market to the USA in 2024

GETTING HERE

Major outbound gateways from India are New Delhi, Mumbai, Hyderabad, Bengaluru, Chennai and Kolkata

Indian carriers are expanding their international routes, especially to the USA, to accommodate the growing demand for direct flights

Air India direct flights to: New York, Newark, Chicago, San Francisco and Washington, D.C.

Middle Eastern carriers are popular for travel to the USA: Emirates, Qatar, Etihad and Turkish Airlines

Pacific carriers like Singapore Airlines, Cathay Pacific, ANA Airlines, Korean Air provide connectivity to the West Coast

THE TRAVELER PROFILE

The primary group traveling from India to the USA consists of millennials aged 25 to 44

2023 visitors to the USA: 67% leisure travelers, 15% business travelers, and 18% students

Indian travelers typically stay for 2-3 weeks in the USA. Top activities: sightseeing, shopping, visiting national parks and monuments, fine dining, visiting art galleries and museums, and enjoying theme parks and cultural experiences (Source: NTTO)

Experiential and immersive travel is gaining popularity

MARKET TRAVEL TRENDS

Positive outbound sentiment- Travel is a lifestyle

In 2023, Indians spent US $20.2 million and were the 4th highest spenders globally

India ranks #2 in international arrivlas to the USA, with 1.5 million+ arrivals as of August 2024

Luxury travel is growing rapidly, with even low-cost carriers expanding into business-class segments due to high demand

There is a significant rise in "B-leisure" and "Work-cation" travel. Travelers embrace a "You Only Live Once" mindset, prioritizing work-life balance

Wellness and outdoor tourism, including nature retreats and adventure experiences, are attracting more Indian travelers

TRADE & MEDIA LANDSCAPE

954 million active internet users as of March 2024

India's media landscape is diverse and dynamic, with digital platforms like YouTube, Netflix, and Hotstar leading in content consumption

Print media still plays an important role for mid-career and older Indians

Suppliers remain important for providing inspiration to consumers

Travel agents and tour operators remain important for customized holiday packages

CHALLENGES

Visa wait times remain long ranging from 300-400 days across India. Besides impacting the first-time traveler, it impacts the MICE business

LOOKING AHEAD

Expansion of direct flights to accommodate the high demand for travel to the USA

Indian consumers are increasingly open to spending more for elevated, premium experiences

The continued rise of digital media and influencer-driven marketing is reshaping travel behavior and preferences in India

ITALY

MARKET OVERVIEW

Population is **58.9 Mil**

The official language is **Italian**

Italy's economy is showing growth
Projected GDP growth rate of 0.9% in 2024

International travels are stable (21%) but still lower than 2019 (-35.6%)

GETTING HERE

Daily air connections are available to the US from Milan, Rome, Naples, Venice. Daily flights are available from Rome to Charlotte (summer flight) and Dallas and from Rome, Venice, Milan to Atlanta

Number of players currently selling US is stable. 80% of the proposed itineraries are self-drive itineraries, that can be modified on request. Louisiana is the main product featured among Southern States

THE TRAVELER PROFILE

The Italian travelers like organizing trips by themselves. A good number of them are repeaters, looking for different/new destinations each time inside the US

Average package length to US is 12 days

Booking window: 30 to 90 days for intercontinental trips, 90 days to 6 months in advance for honeymoons

Average age: 25 - 44 years old, mostly couples

Average travel budget: $2,100 USD per person

Seasonality: July – August are the preferred months for long vacations. Honeymoons are mostly in May, June, September, November

Sun and beach are a focus for Italian travelers. In the US they prefer cultural and nature tours mixing big cities and outdoors

MARKET TRAVEL TRENDS

Number of June and September holidays is increasing, lengthening high season period

Focused on budget due to the higher cost of travel and airlift connections

Renewed attention to slow travels and outdoor activities

US is top destination for honeymoons. It has generally a higher cost compared to leisure holidays and tend to mix tours and seaside. It is mostly sold via tour operators and travel agents

The US is the top long-haul destination for Italian travelers

TRADE & MEDIA LANDSCAPE

Market is very fragmented with a high number of small to medium size tour operators producing small numbers

Printed catalogues are becoming a draft only, often without prices, and tours are strongly personalized

Around 6,000 travel agencies operate in Italy, most of them based in Northern Italy and big cities

Italian travelers are inspired by a mix of online and offline media. Word of mouth is considered very important

Traditional media are still highly considered. There are very few travel media, while lifestyle media often include a consistent travel section

More than half of the Italian population is active on social platforms. Instagram is the most popular platform for travel info, followed by Facebook

CHALLENGES

Increase of cost of international travel

Tour operators selling US are focusing on the easy-to-sell product, penalizing the South of the USA

Louisiana is perceived too hot and with high hurricane risk during Summer

Lack of Italian speaking guides in Louisiana and the lack of guaranteed tours offered pose a challenge

LOOKING AHEAD

Offers with enriching experiences including small towns, local food and landmarks are key to engage new Italian travelers

Traveling in small groups that provide meaningful experiences are increasingly popular for young travelers

The return of business travel is increasing number of bleisure stays, even if with smaller budget

SPAIN

MARKET OVERVIEW

The official language is **Spanish**

Population in 2023 **48 Million**

Spain's GDP on the rise **+2.5% increase in 2024**

The US is the most popular long-distance destination for Spain

GETTING HERE

Direct flights are available from Madrid to/from: New York, Miami, Chicago, Boston, Philadelphia, Washington, Los Angeles, Charlotte, Dallas and Atlanta

There are seasonal flights to the US year round, the price starts at $363 round trip. However, prices can vary depending on the dates

2023 arrivals to the US from Spain was 825.8K. (Source: BUSA)

Top US destinations: New York, California, Texas, Florida, DC, Hawaii

THE TRAVELER PROFILE

Spaniards traveling to the United States are 51.6% female and 48.4% male. The age range is:
25 - 34 years 17.4%,
35 - 44 years 19.5%,
45 - 54 years 20.3%,
55 - 64 years 19.6%
65 - 74 years 13.5%

The preferred month for long trips is August

Spaniards prefer 3 and 4 star hotels, but will also book budget, AirBnB and B&B

Spaniards are interested in multi-city tour that includes cultural experiences, gastronomy, sun and beach holidays

MARKET TRAVEL TRENDS

Tour operators and travel agents are still the number one reference for the market

According to a 2024 Travellize study, over 33% of Spanish travelers, seek travel inspiration online through OTAs, underscoring their influence in trip planning

Many consumers feel confident booking their travel independently online, opting to make direct purchases for accommodations and transportation through providers' official websites

Spaniards prefer self drive tours

TRADE & MEDIA LANDSCAPE

OTAs hold significant relevance with leading players including Logitravel, Destinia, Lastminute, Skyscanner and Hotelbeds

Tour operators are increasingly transitioning to digital platforms to align with the growing demand for online booking channels

Large social media consumption:
74% Instagram,
63% YouTube,
54% Facebook

CHALLENGES

Safety and low crime are top priority. Hygiene standards are important after Covid-19, general cleanliness, easy access to medical facilities

Spaniards are concerned with: threat of terrorist attack and local insecurity, natural disasters or extreme weather at the destination, international conflicts, political instability in destination

LOOKING AHEAD

Regardless of demographic characteristics, Spaniards of all ages and incomes love to travel. International trips are a priority for many

SWITZERLAND

MARKET OVERVIEW

Switzerland is a small country, but the **7th largest** economy in Europe

Switzerland has four national languages: **German, French, Italian and Romansh**

Population is **8.85 Million** with 2.6% unemployment

Switzerland has the **third highest per capita GDP** in Europe (2024)

GETTING HERE

Zurich and Geneva are the two airports within Switzerland with USA connections. From Zurich to New York, Washington DC, Atlanta and Tampa Bay and from Geneva to New York and Washington DC

There are approximately 1,200 travel agencies in Switzerland. 35% of customers book their trips through travel agencies or booking portals. The majority prefer to book directly with the supplier

THE TRAVELER PROFILE

The Swiss have an average income of USD 90,000 and travel abroad 2.5 times a year

The Swiss traveler likes to explore, get to know the country and its people, loves the outdoors as well as big cities

People living in Switzerland enjoy one of the world's highest per capita incomes. A strong Swiss Franc combined with high income provides for a high purchasing power

MARKET TRAVEL TRENDS

Individual trips and tailor-made tours are still trending

Swiss travelers tend to seek luxury hotels when visiting North America. However, for long-term stays, they are often more flexible and may opt for accommodations that are not necessarily in the higher luxury segment

Fly Drives and RV tours are first choice for the Swiss traveler

TRADE & MEDIA LANDSCAPE

Switzerland is part of the Visa Waiver Program and can therefore easily enter the US with ESTA

72% of Swiss people use social media in Switzerland

Blogger and Influencer inspire more and more people to travel into certain destinations

The Swiss traveler is comfortable booking travel product online and directly from the provider (68%), using less travel agent services

CHALLENGES

Price increases inhibit long-distance travel. USA prices are too expensive. USA is less competitive in promoting to the Swiss traveler

Politics, entry restrictions, lack of sustainability efforts in the US, security concerns, homelessness in large cities are arguments against a vacation in the USA

LOOKING AHEAD

In 2019, there were exactly 500,000 Swiss travelers to the USA. Forecast Swiss will return to 2019 levels in the year 2025

UK / IRELAND

MARKET OVERVIEW

The UK remains the **#1** overseas source market to the US

The UK population incorporating England, Wales, Northern Ireland & Scotland is estimated to be **68 mil**

Over **63.7%** of the population are between the **age 15-64**

The United Kingdom is the **6th largest economy in the world**

GETTING HERE

Over 90% of UK and Irish tour operators feature product within the state of Louisiana

Most UK and Irish consumers arriving into Louisiana will travel by car or RV once in state

British Airways continues to offer direct flight service into New Orleans from London Heathrow

Trans-Atlantic Carriers, British Airways, Virgin Atlantic, Delta Airlines, American Airlines, United Airlines and Aer Lingus continue to reintroduce flight routes

The introduction of Jet Blue and Norse Atlantic Airways to the market has brought new competition to legacy airlines

THE TRAVELER PROFILE

The average UK consumer stay 10 nights when travelling to the US. A trip to Louisiana and the Deep South region is longer with duration between 14-21 nights

The majority of UK visitors into Louisiana are independent travellers (FIT), travelling as a couple or small friend groups

The initial disruption to typical booking windows seen post pandemic is reverting to longer lead times. Tour operators are reporting 10-15 months between booking and travel

UK consumers are 30% more likely to book with a travel professional than before the pandemic

MARKET TRAVEL TRENDS

Wide open spaces complemented by city breaks. Top 2 reasons to go on holiday are seeing local landmarks and sampling local cuisine

The desire to experience more in destination has led to itineraries that include multiple states and cities within their road trips

Sustainable (yet affordable) tourism. Consumers do not believe they should subsidize corporate sustainability efforts with inflated prices

Multi-generational family travel is increasing in popularity since the end of the pandemic

Luxury Travel segment is growing. The traveler still expects value for money and should reflect overall elevated experience at all touch points

TRADE & MEDIA LANDSCAPE

Engaging with the growing number of home-based travel agents has become an increasing priority to strengthen these connections. Louisiana actively participates in trade roadshow events with Visit USA, Travel Gossip, and Travel Counsellors

Investment in PR, media and influencers is vital to success. These sources are trusted by the consumer to be informative and appealing

Social Media Promotions with tour operators and media in the UK and Ireland have continued to increase exposure, boost awareness of Louisiana and promote it as a unique and memorable destination

There is a strong scheduled group touring market into Louisiana

CHALLENGES

The challenge around reaching front line sales staff remains. An increased number of sales staff work exclusively from home

Travel to the Far East and Central Asia is widely popular and presents incredible value for money when compared to prices against the US

The cost of living increases continues to slowdown holiday bookings. This has softened 2024 vs 2023 but remains a concern for the traveler

Legislation and law changes across the US are making news in the UK and Ireland and may prove a moral challenge to some travellers

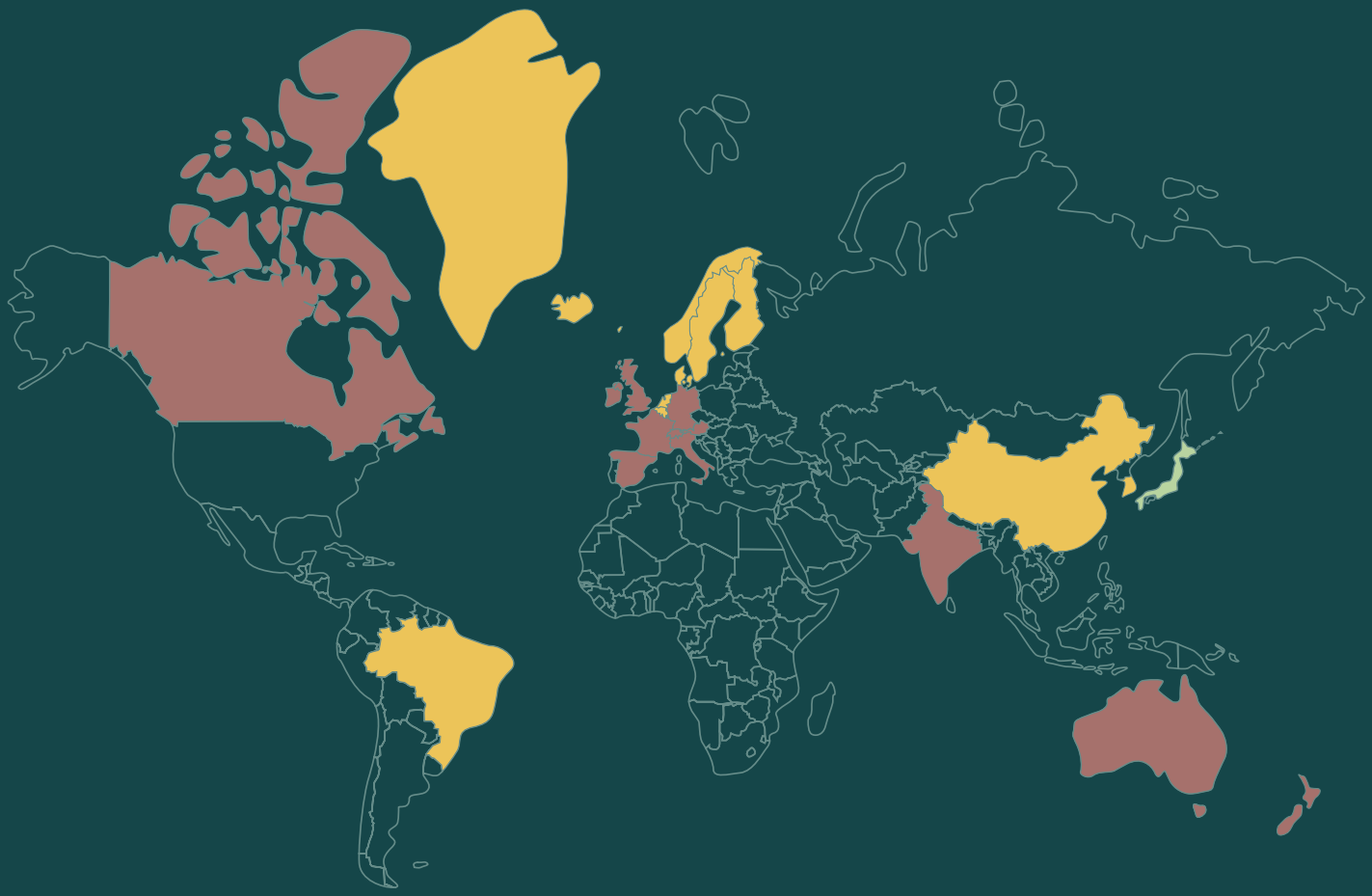
LOOKING AHEAD

Destinations that offer deeply immersive, authentic and local experiences will continue to be key deciders in the consumers final travel decision

92% of young travelers say they are influenced by social media when making travel plans. Examples such as Trending Travel, Lonely Planet and Wanderlust have positioned themselves at the forefront of this type of engagement

Luxury Travel is expected to be fastest growing sector. Aspirational travelers are willing to upgrade key aspects of their travel plans

Preserving and promoting local history and culture is important. Distinguishing yourself as a destination will help generate clear intent to travel



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