



INTERNATIONAL
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The Importance of Emerging Markets to International Travel

David Huether, NTTO Deputy Director of Research
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A Panel Discussion on the Importance of Emerging Markets to the U.S. Travel Industry

Moderator and Panelists

- Moderator: David Huether, Deputy Director of Research, National Travel and Tourism Office

Panelists

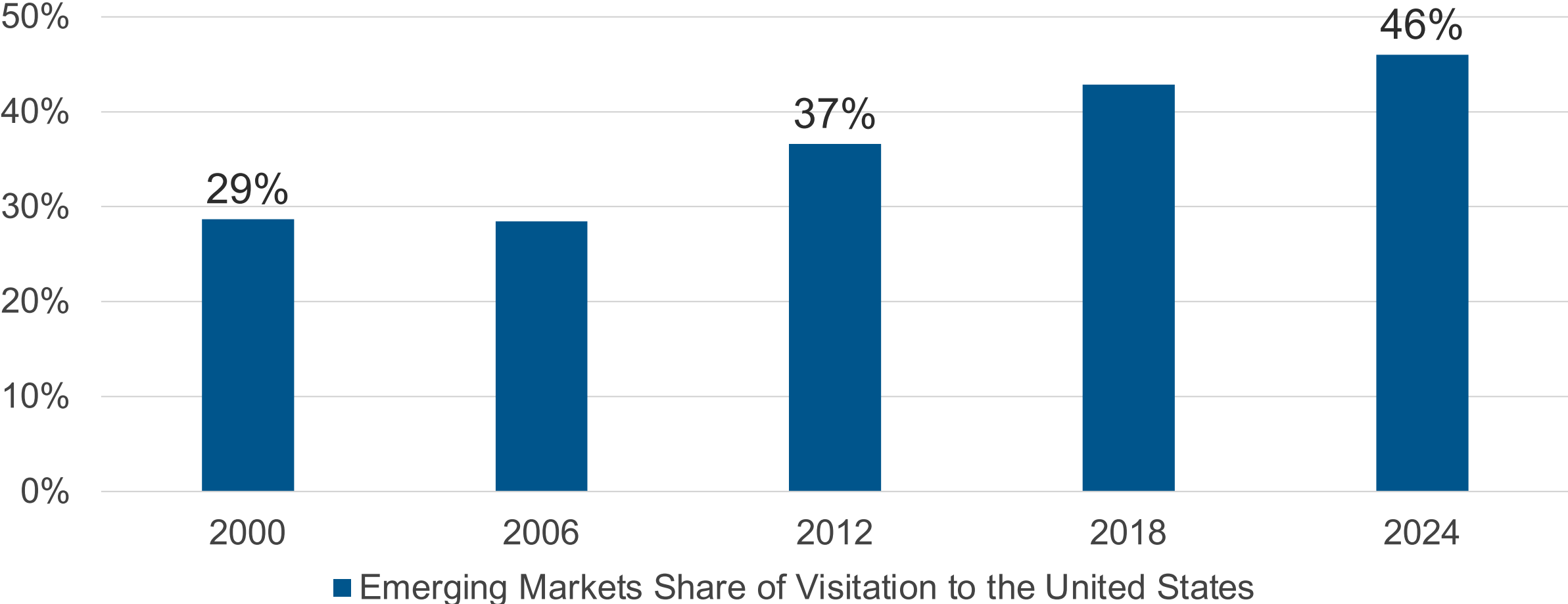
- Makiko Matsuda Healy: Senior Vice President, Tourism Market Development, New York City Tourism + Conventions
- Alfredo Gonzalez: Sales Team Lead, Discover Long Island
- Florian Herrmann: Founder & CEO, HermannGlobal Tourism Insights & Marketing

What are Emerging Markets

- Central America
- Caribbean
- South America
- Africa
- Middle East
- Eastern Europe
- Emerging Asia: China, Indonesia, India, Malaysia, Philippines, Vietnam and Thailand

Why Emerging Markets Are Important to the U.S. Travel Industry

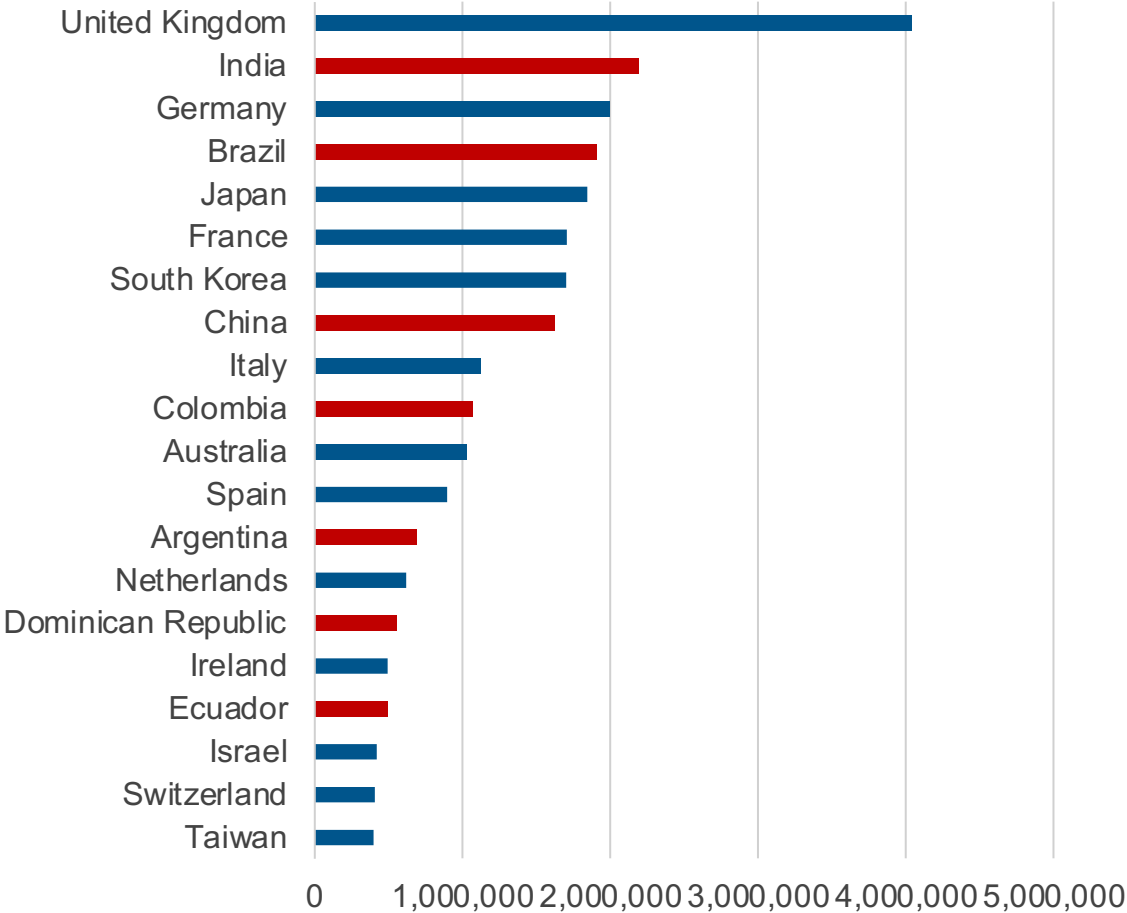
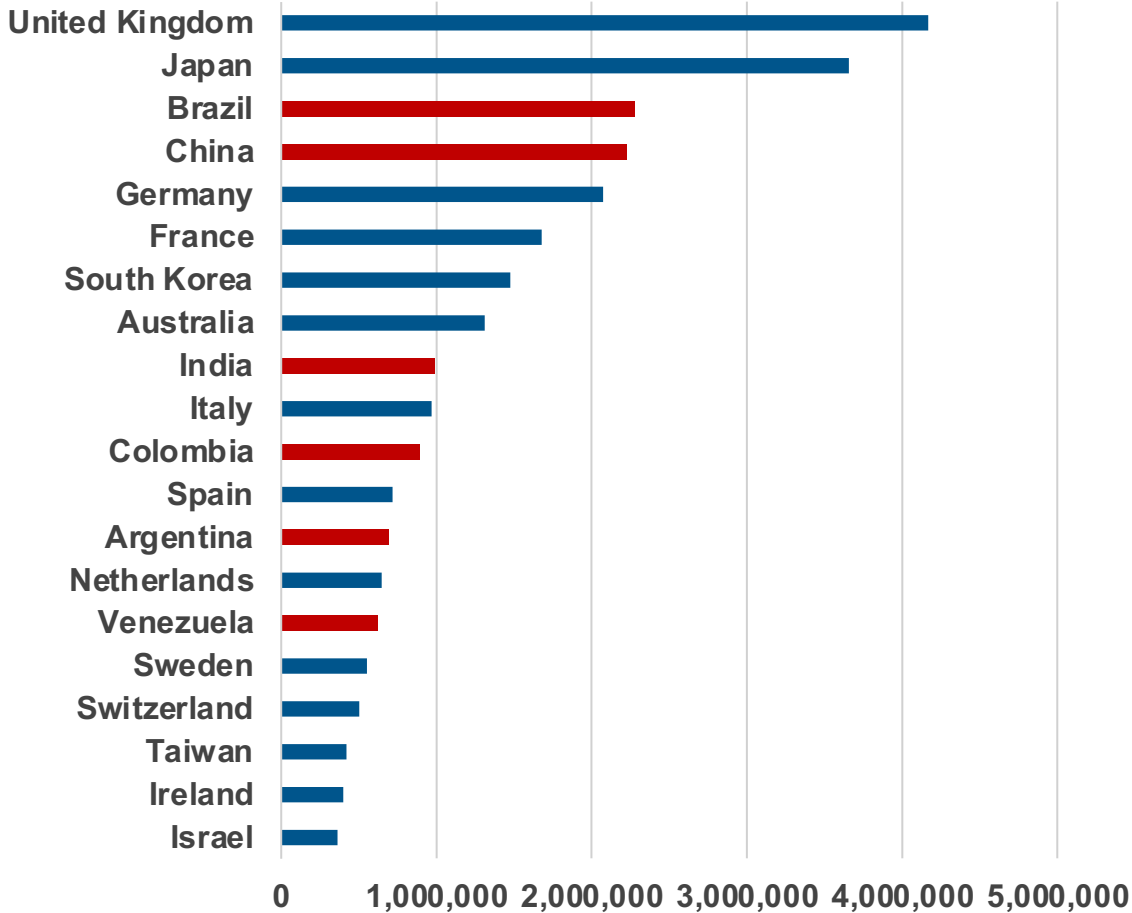
Emerging Markets Share of Visitation to the United States



Why Emerging Markets Are Important to the U.S. Travel Industry

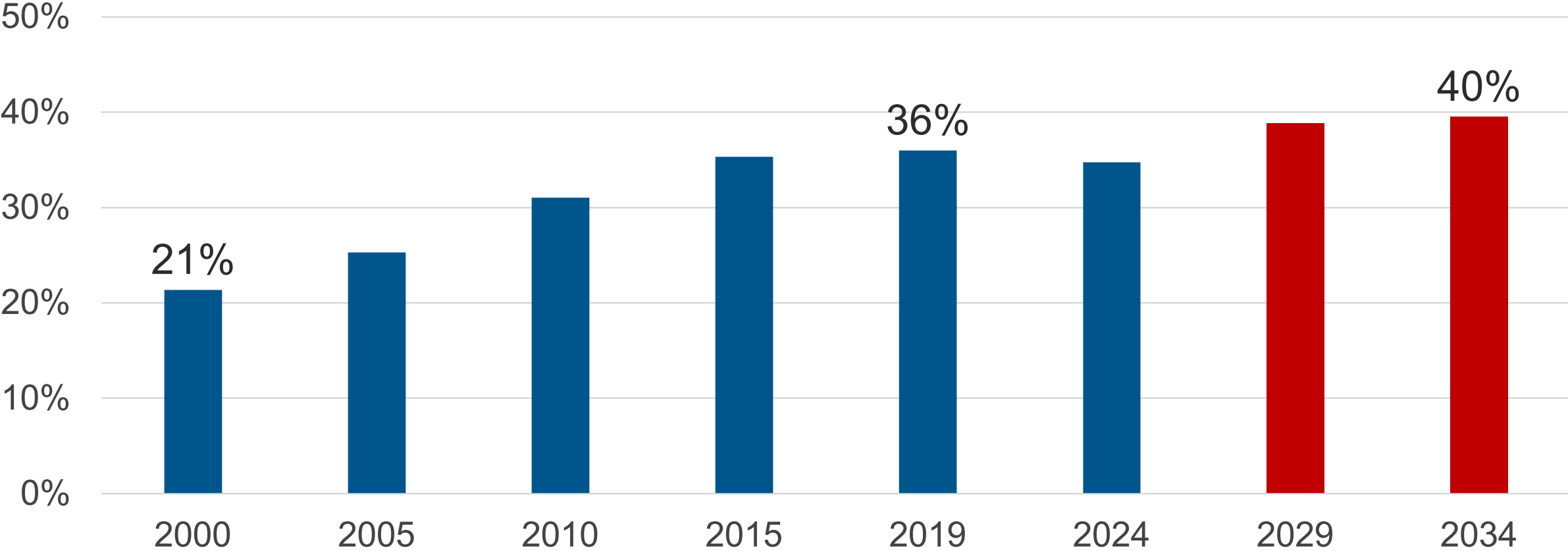
2014 (29% of Top 20 Overseas Visitation)

2024 (34% of Top 20 Overseas Visitation)



Why Emerging Markets Are Import to the U.S. Travel Industry

Emerging Market Share of World Outbound International Travel



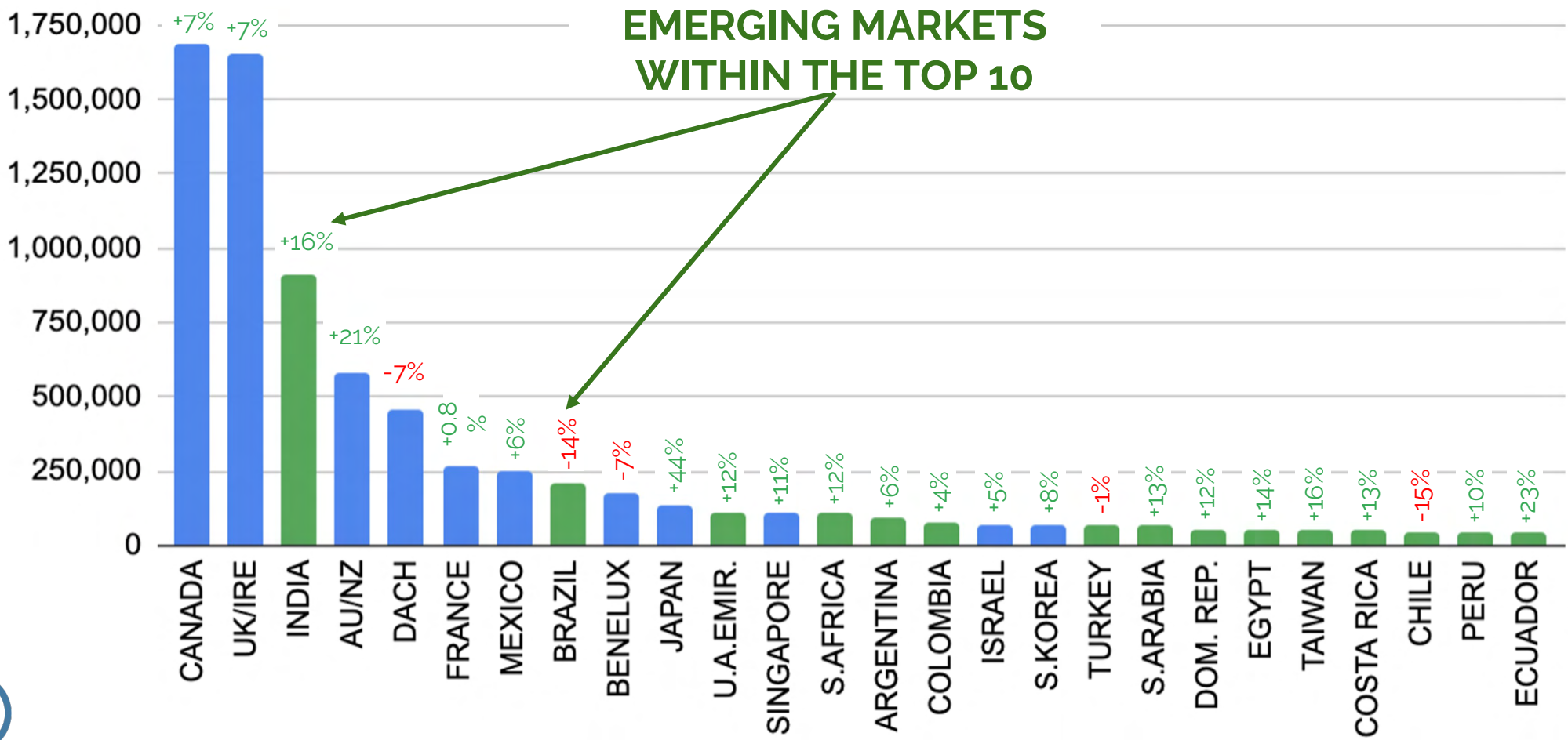


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Panel Time!

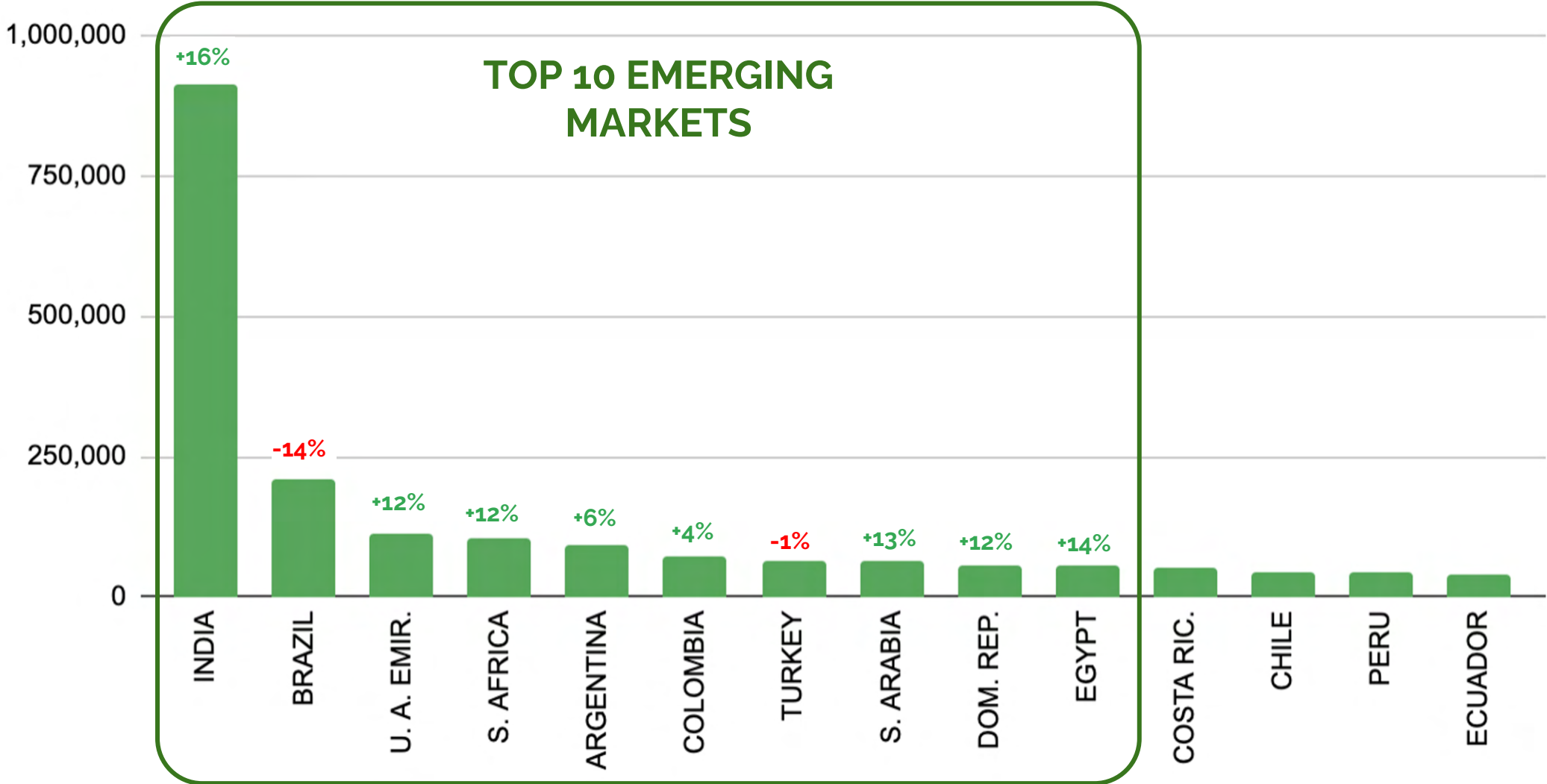
2024 RANKING OF USA TRADITIONAL & EMERGING MARKETS BASED ON INTEREST TO VISIT

AVERAGE MONTHLY SEARCHES

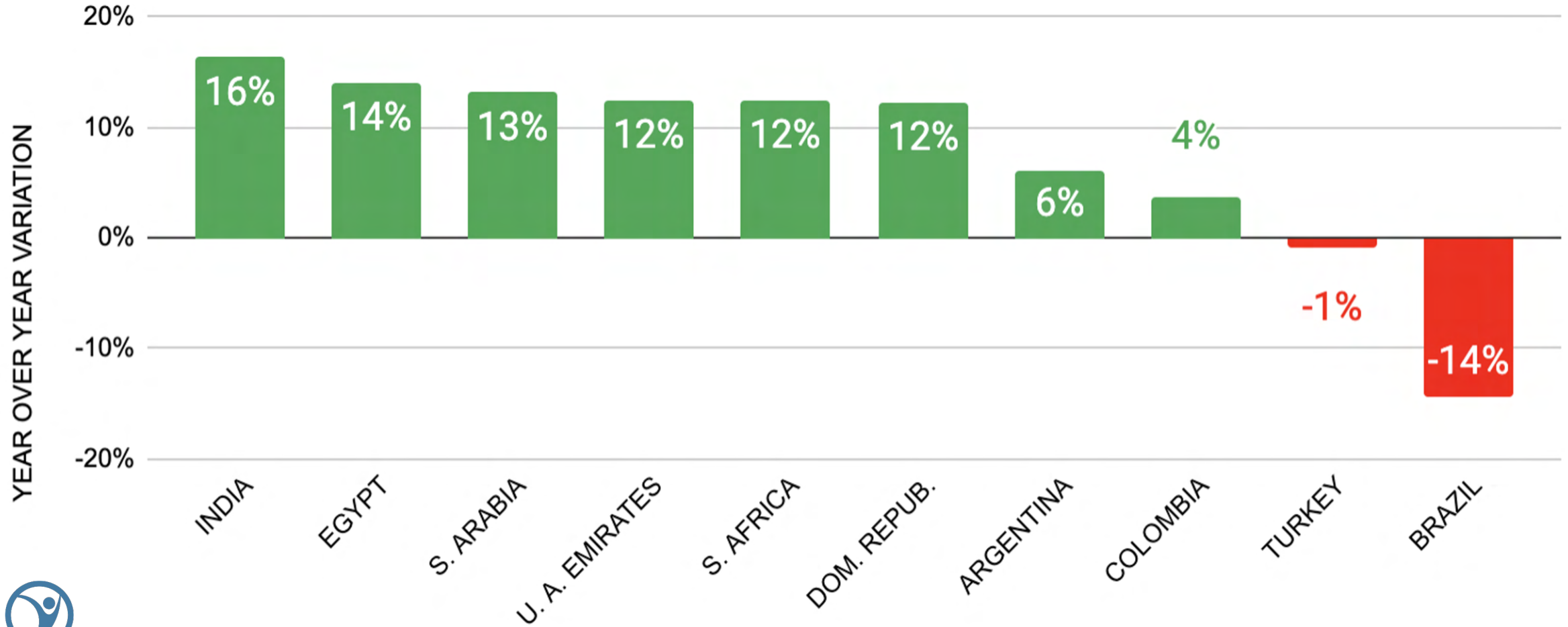


2024 RANKING OF EMERGING MARKETS BASED ON INTEREST TO VISIT THE USA

AVERAGE MONTHLY SEARCHES

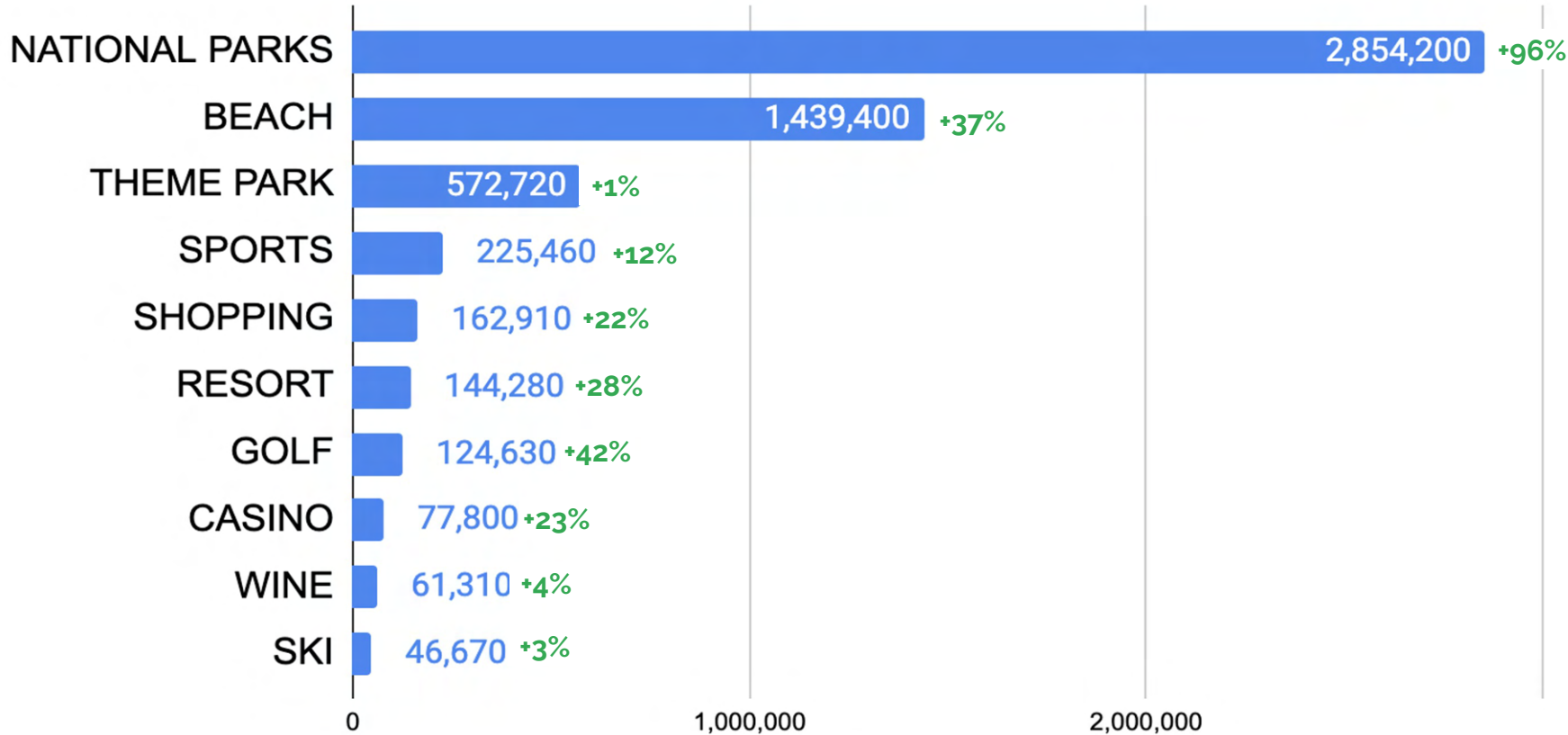


2023 vs 2024 CHANGE OF INTEREST TO VISIT THE USA FROM TOP 10 EMERGING MARKETS



2024 MOST SEARCHED THEMES BY THE TOP 10 USA EMERGING MARKETS

IND - BRA - UAE - SAF - ARG - COL - TUR - SAR - DOM - EGY



AVERAGE MONTHLY SEARCHES

NOTE: Within "National Parks", "Yellowstine NP" drives 90% of the results (no TV Show related).

MOST POPULAR

NATIONAL PARKS:

- yellowstone (90% results)
- grand canyon skywalk
- yosemite
- denali
- zion

BEACH:

- miramar beach fl usa
- miami beach america
- long beach ca usa
- cocoa beach usa
- palm beach fl usa

THEME PARK:

- walt disney world usa
- epcot usa
- universal islands adventr
- dollywood usa
- discovery cove usa
- six flags usa

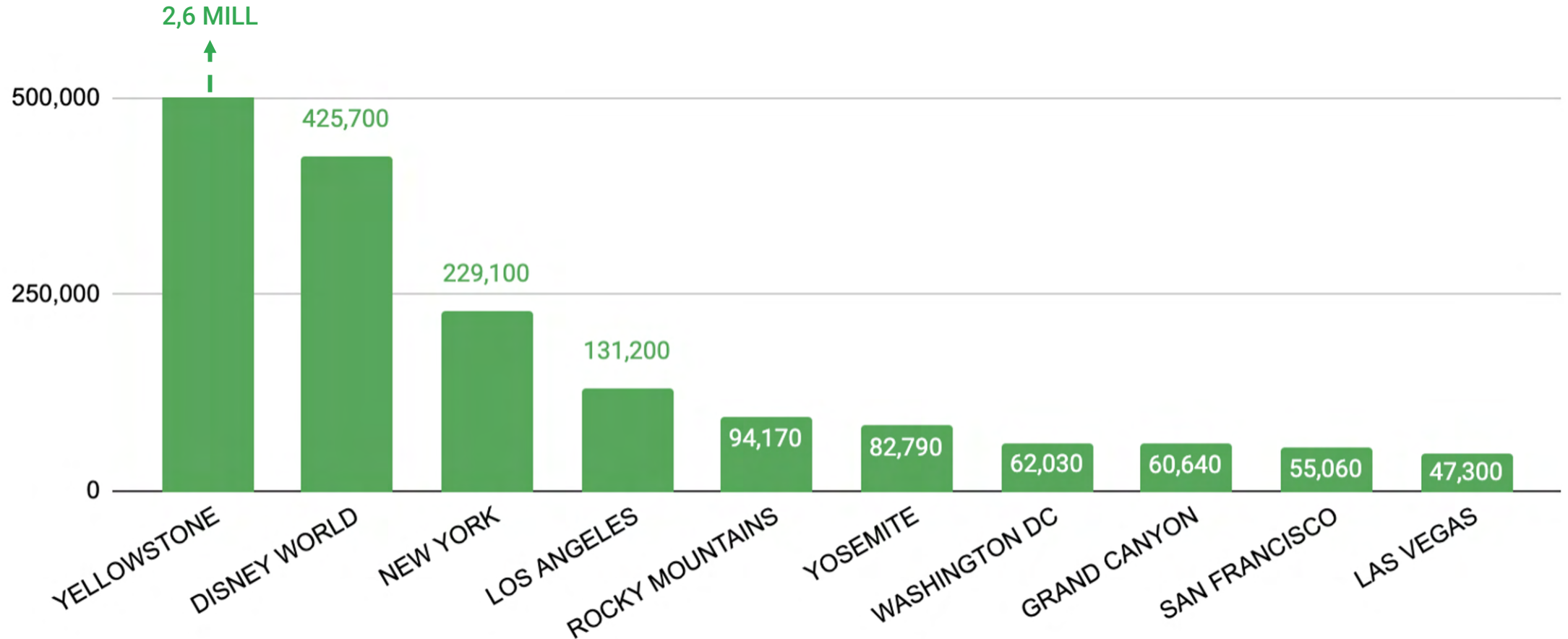
SPORTS:

- football
- golf
- bastektball
- soccer
- cricket
- swimming



2024 RANKING OF DESTINATIONS BY THE TOP 10 USA EMERGING MARKETS

IND - BRA - UAE - SAF - ARG - COL - TUR - SAR - DOM - EGY

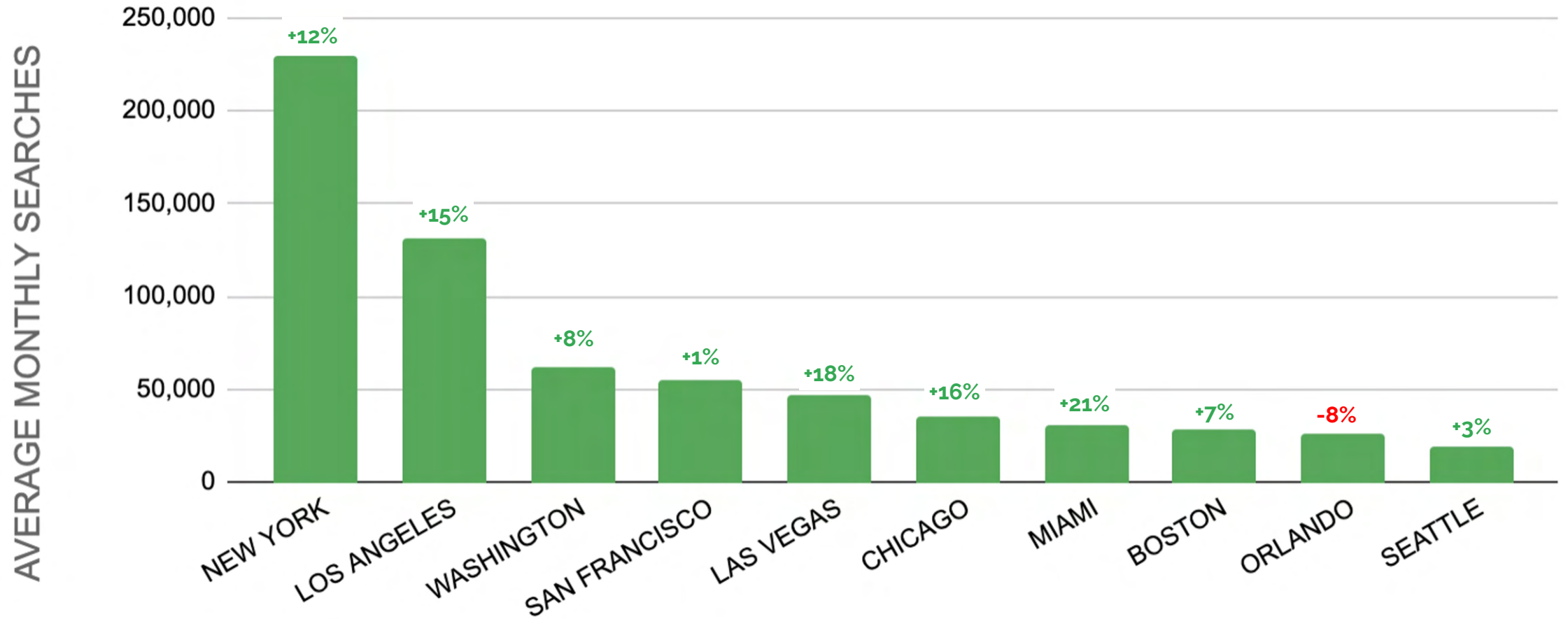


AVERAGE MONTHLY SEARCHES



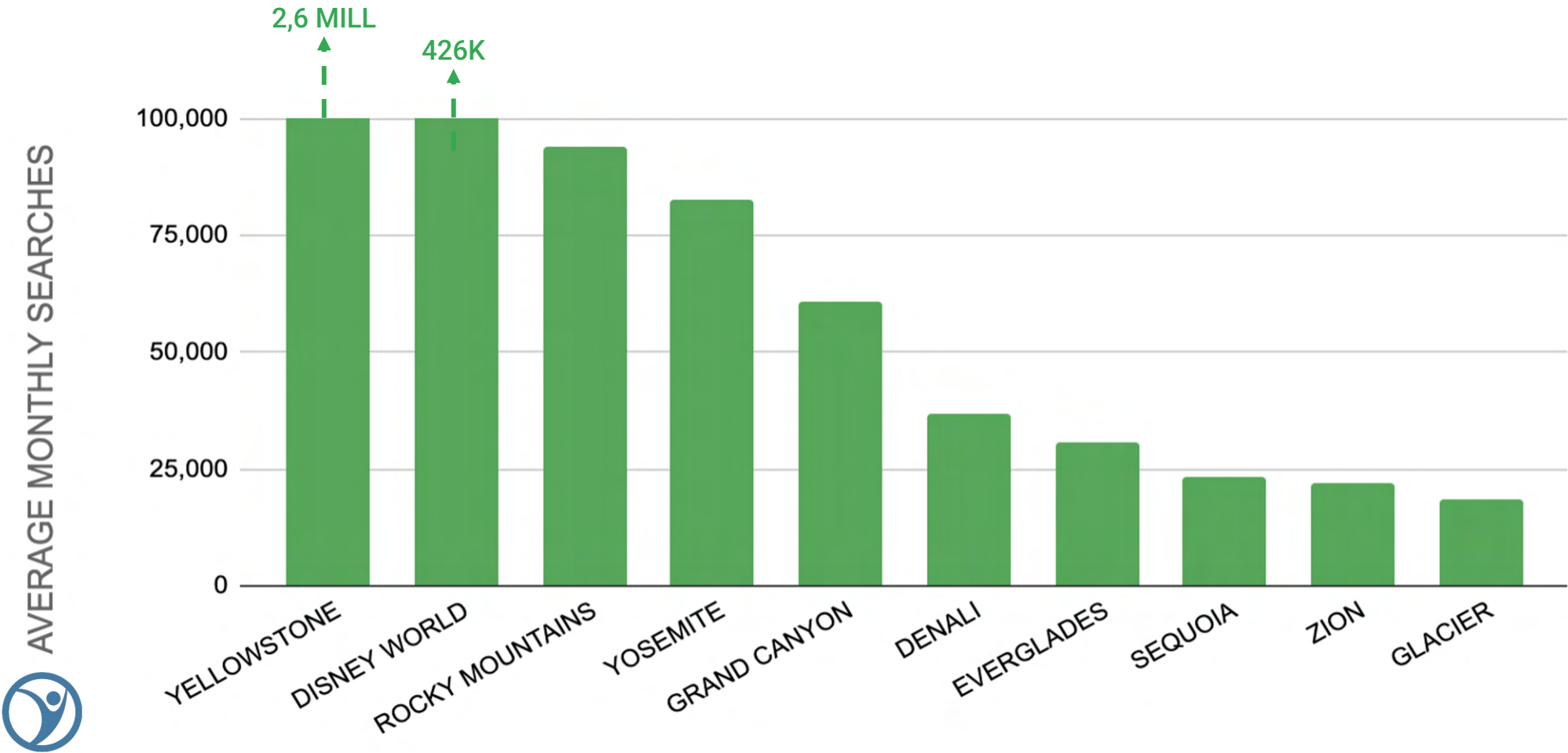
2024 ONLY CITIES: TRAVEL-RELATED RANKING BY THE TOP 10 USA EMERGING MARKETS

IND - BRA - UAE - SAF - ARG - COL - TUR - SAR - DOM - EGY



2024 ONLY ATTRACTIONS: TRAVEL-RELATED RANKING BY THE TOP 10 USA EMERGING MARKETS

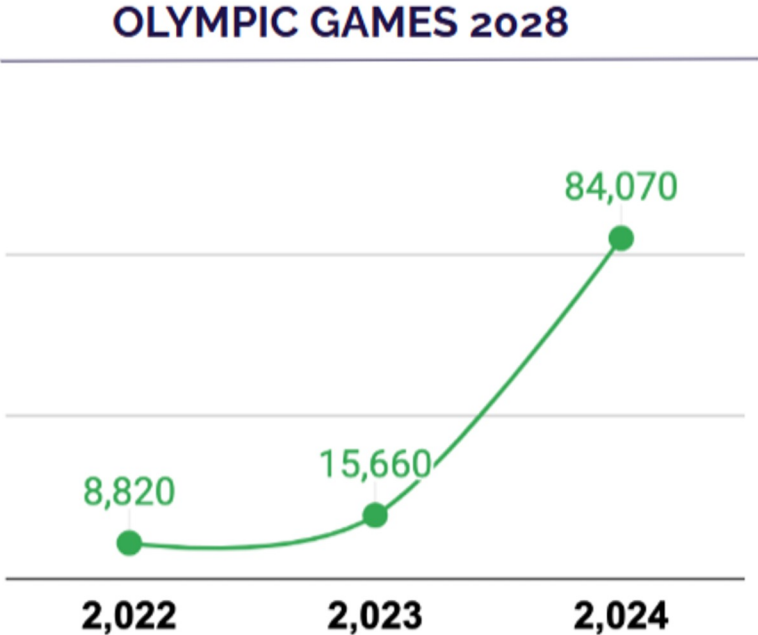
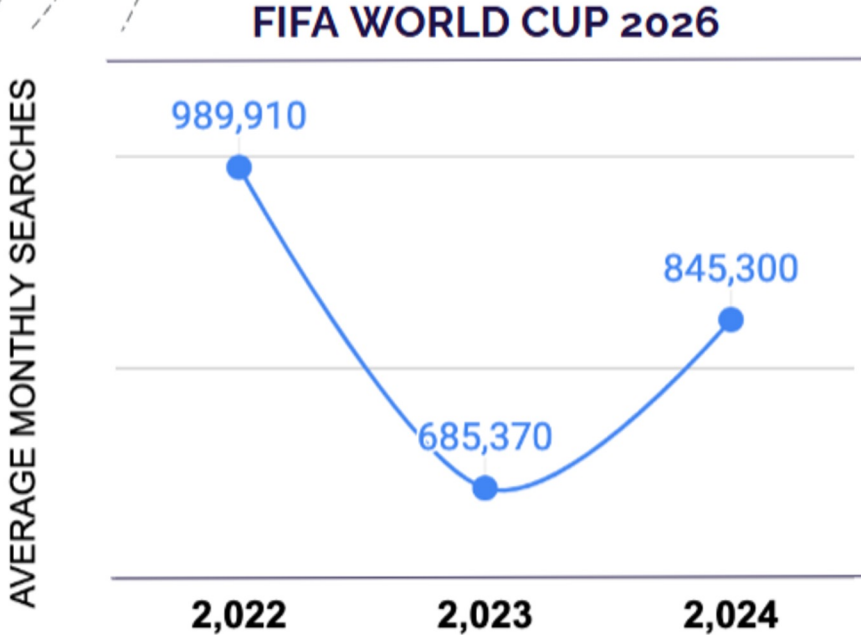
IND - BRA - UAE - SAF - ARG - COL - TUR - SAR - DOM - EGY



What About 2026 World Cup and the 2828 Olympics

2022 - 2024 YoY INTEREST IN WORLD CUP & OLYMPICS BY THE TOP 10 USA EMERGING MARKETS

IND - BRA - UAE - SAF - ARG - COL - TUR - SAR - DOM - EGY



NOTE: The spike of FIFA World Cup in 2022 happened from Oct to Dec due to searches about the next edition.