



USA TRAVEL SHOW
2023
Market Update

Welcome by

Discover America & Atlantic Link



Discover America &
Atlantic Link
Karin Gert Nielsen
CEO



Atlantic Link

Meet the team



Karin Gert Nielsen
CEO & Founder



Klaus Henriksen
VP Finance & Admin



Frank Nordbjerg
CCO Commercial Director



Martin Schmidtsdorff
Sales Manager



Eloïse Korinek
Event Manager



Sema Eyidogan
PR Manager



Line Bukdal Jacobsen
PR Communications Assistant



Vibe Klinger
Marketing Manager

Thank you to our sponsors & partners



Program today, March 23rd

16.00 - 16.45

Market update

Discover America, Karin Gert Nielsen and Brand USA, Amanda Davis

17.00 - 17.40

Welcome reception Agents, Media & Exhibitors

Memphis Tourism

17.30

Group photo staircase with US Ambassador

17.45 - 18.00

Welcome

Discover America, Karin Gert Nielsen &
The US Ambassador to the Kingdom of Denmark, Mr. Alan Leventhal,

18.00 - 20.00

Workshop

20.00 – 20.45

Buffet dinner

SUMMIT One Vanderbilt
America & Beyond

20.45 - 21.00

Prize draw

Agents & Media:

- 100 travel agents & tour operators
- 30 media & influencers

TODAY'S CHALLENGES



- Climate emergency
- Exclusion and inequity
- Workforce shortages

- Economic uncertainty – inflation, recession
- Political volatilities – Ukraine war, China trade war
- Future crises – health, weather

- Societal Polarization
- Migrant crises
- Low margins
- Overcrowding, Overconsumption, Overdependence

Scandinavia and Finland



- **More seat capacity in 2023** summer programs compared to pre-pandemic
- USA is the **#1 long haul destination** for visitation from the Nordic market
- **1.3 million arrivals** into the USA in 2019 (84% repeaters)
- **4th largest European market** in terms of arrivals with 4% of the population traveling to the U.S.
- Strong spenders: **#1 in spending** per visitor in Europe
- Average length of stay **20 days** in 2019 (Germany 16.9, France 15.0, UK: 11.9)
- **100% online market** – most used channels for inspiration: Search engines, travel company websites, and **airline websites**

Four different markets

5th Largest Market in the World – Scandinavia and Finland outbound spend

100% online market – most used channels for inspiration travel agencies websites, airline websites



POPULATION
32.4 MILLION

4

COUNTRIES
LANGUAGES
CURRENCIES

TOTAL AREA

1,492,211 SQUARE KILOMETRES
576,145 SQUARE MILES

**ALL COUNTRIES EXCEPT
NORWAY ARE EU MEMBERS**

6 WEEKS PAID VACATION
12 PAID HOLIDAYS



\$ 95.693

AVERAGE HOUSEHOLD
INCOME

2 YEARS

MATERNITY LEAVE



TRAVEL
MULTIPLE
TIMES PER YEAR

ADVANCE TRIP DECISION

95 DAYS



FREE

EDUCATION

FREE
HEALTH CARE



STABIL ECONOMY
LOW UNEMPLOYMENT

INTERNET
PENETRATION **96%**

**COPENHAGEN & SOUTHERN
SWEDEN MOST DENSELY
POPULATED AREAS**

Visitor Arrivals

Country/Period	2022	2019	2018	2017
DENMARK	214.340	314.060	331.374	332.987
SWEDEN	247.593	451.612	506.323	522.211
NORWAY	143.118	267.930	280.565	287.407
FINLAND	79.288	142.405	141.297	145.717
ICELAND	43.980	60.241	73.361	66.357
THE BALTICS	59.114	79.273	73.934	75.603
TOTAL AREA	787.433	1.315.521	1.406.854	1.430.282
ITALY	717.593	1.086.026	1.073.383	1.032.107
FRANCE	1.317.882	1.873.782	1.767.461	1.667.506
GERMANY	1.481.008	2.063.767	2.062.462	2.080.425
UNITED KINGDOM	3.466.107	4.779.997	4.659.178	4.482.707

Direct Airlift Nordic's 2023



DK, Copenhagen	→	Newark, JFK, Boston, Washington, Chicago, Miami, Los Angeles, San Francisco
DK, Aalborg	→	Newark
NO, Oslo	→	Newark, Miami
SE, Gothenborg	→	Newark
SE, Stockholm	→	Newark, Chicago, Miami



FI, Helsinki	→	JFK, Chicago, Miami, Dallas, Los Angeles, Seattle
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DK, Copenhagen	→	JFK
IS, Reykjavik	→	JFK, Detroit (seasonal), Minneapolis (seasonal)
SE, Stockholm	→	JFK



IS, Reykjavik	→	Chicago (seasonal)
SE, Stockholm	→	Newark (seasonal)

Direct Airlift Nordic's 2023



IS, Reykjavik



Boston, JFK, Newark, Baltimore, Washington, Chicago, Raleigh-Durham, Detroit (seasonal), Minneapolis, Orlando, Denver, Portland, Seattle



IS, Reykjavik



Newburgh (NY), Stewart (NY), Boston, Washington, Baltimore
Connection from DK, NO, SE



NO, Oslo OSL



New York JFK, Fort Lauderdale, Los Angeles (seasonal), Orlando (seasonal)

UK, London LGW



Boston, Fort Lauderdale, Los Angeles, New York JFK, Orlando, San Francisco, Washington Dulles, Oslo

GE, Berlin BER



Fort Lauderdale, Los Angeles, New York JFK

FR, Paris CDG



New York JFK

IT, Rome FCO



New York JFK



FA, Faroe Islands



New York

Trip Purpose, Net Purpose

Main Purpose (multiple response) [% of respondents]	2015	2017	2018	2019	2020	2021
Business	11,6	12,4	13,4	12,2	17,4	17,6
Convention/Conference/Trade Show	10,7	9,0	10,2	10,5	11,2	2,9
Education	5,9	5,3	6,1	9,3	7,6	10,7
Health Treatment	0,5	0,2	0,2	0,3	0,2	0,4
Vacation/Holiday	73,3	72,9	72,6	67,5	60,3	51,0
Visit Friends/Relatives	31,8	33,8	31,6	31,6	40,3	62,4
Religion/Pilgrimages	0,4	0,5	0,3	0,3	0,8	0,0
Other	0,3	0,1	0,1	0,3	0,5	0,4
BUSINESS & CONVENTION	20,5	20,1	20,7	20,6	22,9	19,9
LEISURE & VFR	83,5	83,1	82,6	79,9	75,8	79,8

Information Sources Used for Trip Planning

[percent of respondents]	2015	2017	2018	2019	2020	2021
Airlines	48,0	53,2	50,9	53,7	44,2	74,0
Corporate Travel Dept.	13,5	11,8	14,3	12,3	18,3	10,6
Personal Recommendation	21,7	27,7	30,0	25,9	21,9	17,2
Online Travel Agency	46,7	41,5	46,6	34,3	48,0	40,4
Travel Agency Office	15,0	14,2	14,6	12,2	8,5	4,0
National/State/City Travel Office	5,2	7,6	7,3	2,9	3,6	12,3
Tour Operator/Travel Club	4,3	4,5	5,0	2,5	3,4	0,6
Travel Guides	14,0	8,8	12,8	6,7	6,6	8,7
Other	5,3	4,3	3,8	5,3	2,6	4,7

Activity Participation

[percent of respondents]	2015	2017	2018	2019	2020	2021
American Indian Communities	4,7	4,2	3,8	5,2	0,7	3,8
Amusement/Theme Parks	26,1	25,0	20,4	19,1	28,4	19,7
Art Gallery/Museum	31,0	30,2	32,7	31,9	21,2	33,5
Camping/Hiking	5,5	7,2	5,4	7,7	8,3	9,5
Casinos/Gamble	9,8	8,2	6,4	5,2	7,1	3,8
Concert/Play/Musical	15,2	18,8	16,6	19,1	14,3	8,2
Cultural / Ethnic Heritage Sites	12,5	13,7	11,6	13,8	17,3	15,3
Experience Fine Dining	29,8	30,5	29,2	28,2	20,9	28,3
Environmental/Eco. Excursions	2,6	1,4	1,0	3,3	3,7	2,6
Golfing/Tennis	3,0	3,3	1,7	4,1	5,0	5,2
Guided Tours	26,8	27,0	25,6	27,9	17,0	10,5

[percent of respondents]	2015	2017	2018	2019	2020	2021
Historical Locations	33,1	36,4	30,5	33,5	27,5	23,6
Hunting/Fishing	3,0	1,5	1,3	2,1	4,0	2,9
National Parks/Monuments	43,3	42,0	40,0	37,9	27,4	30,5
Nightclubbing/Dancing	16,8	15,6	16,9	15,4	15,1	12,6
Shopping	90,7	89,1	88,2	85,0	84,4	82,6
Sightseeing	80,6	77,8	80,3	76,8	75,9	68,5
Small Towns	35,2	36,5	38,8	36,4	36,2	42,6
Snow Sports	0,7	1,5	0,8	2,6	0,9	2,3
Sporting Event	19,0	16,9	17,4	18,0	14,2	23,3
Water Sports	11,0	9,8	5,7	6,3	3,2	5,5
Other	1,4	1,8	3,0	2,3	0,3	2,0

Transportation Types used in the U.S.

[percent of respondents]	2015	2017	2018	2019	2020	2021
Air Travel between U.S. Cities	27,4	23,5	23,0	23,8	30,8	36,3
Bus between Cities	13,4	12,2	12,1	14,5	16,0	8,5
Railroad between Cities	8,5	8,0	9,3	10,5	8,5	7,0
City Subway/Tram/Bus	36,6	32,7	36,1	33,8	25,9	22,3
Ferry/River Taxi/Srt Scenic Cruise	11,6	11,5	12,5	11,6	10,0	0,9
Rented Bicycle/Motorcycle/Moped	3,9	2,5	2,9	2,7	0,0	1,2
RideSharing Service		12,2	17,5	19,4	17,5	24,3
Taxicab/Limousine	39,1	32,7	33,1	25,9	28,4	13,6
Auto, Private or Company	33,9	35,1	36,4	33,3	38,6	58,3
Rented Auto	35,3	37,6	31,2	32,9	29,1	27,1
Cruise Ship/River Boat 1+ Nights	4,4	3,4	5,3	7,1	15,6	2,4
Motor Home/Camper	0,6	0,2	0,3	0,5	1,2	0,1

Select Traveler Characteristics

[percent of respondents]	2015	2017	2018	2019	2020	2021
Advance Trip Decision (mean days)	116	120	115	117	81	73
Advance Trip Decision (median days)	90	90	90	90	60	30
% Used Prepaid Package	6,4	5,4	5,3	4,9	10,3	0,4
% First International U.S. Trip	19,5	20,0	18,0	15,7	8,4	11,9
Length of Stay in the U.S. (mean nights)	17,5	16,6	13,9	20,0	15,6	20,9
Length of Stay in the U.S. (median nights)	10	10	9	9	10	13
Number of States Visited (% 1 state only)	70,2	73,9	76,1	74,9	74,9	66,9
Number of States Visited (mean average)	1,5	1,4	1,4	1,4	1,3	1,5

Program tomorrow, March 24th

08.30 - 09.00	Registration, morning coffee, networking
09.00 - 09.15	Welcome by Karin Gert Nielsen, Discover America & Amanda Davis, Brand USA
09.15 - 10.45	One-on-one meetings, buyers, media, and exhibitors
10.45 - 11.00	Break
11.00 - 11.45	News conference by Travel South
11.45 - 12.30	News conference by Mammoth Lakes & Yosemite
12.30 - 13.00	Lunch
13.00 - 13.45	Insights from Industry leaders, DMO's
13.45 - 14.00	Break
14.00 - 14.45	Nordic Town Hall meeting, airlines
14.45 - 15.00	Q&A
15.00 - 16.00	Closing reception

Participating tomorrow:

- 25 media
- 30 tour operators, executives, and decision-makers



BRAND USA UPDATE

USA TRAVEL SHOW 2023
COPENHAGEN, DENMARK

Amanda Davis

**Sr Manager, Global Trade
Development**

U.K., Europe, India

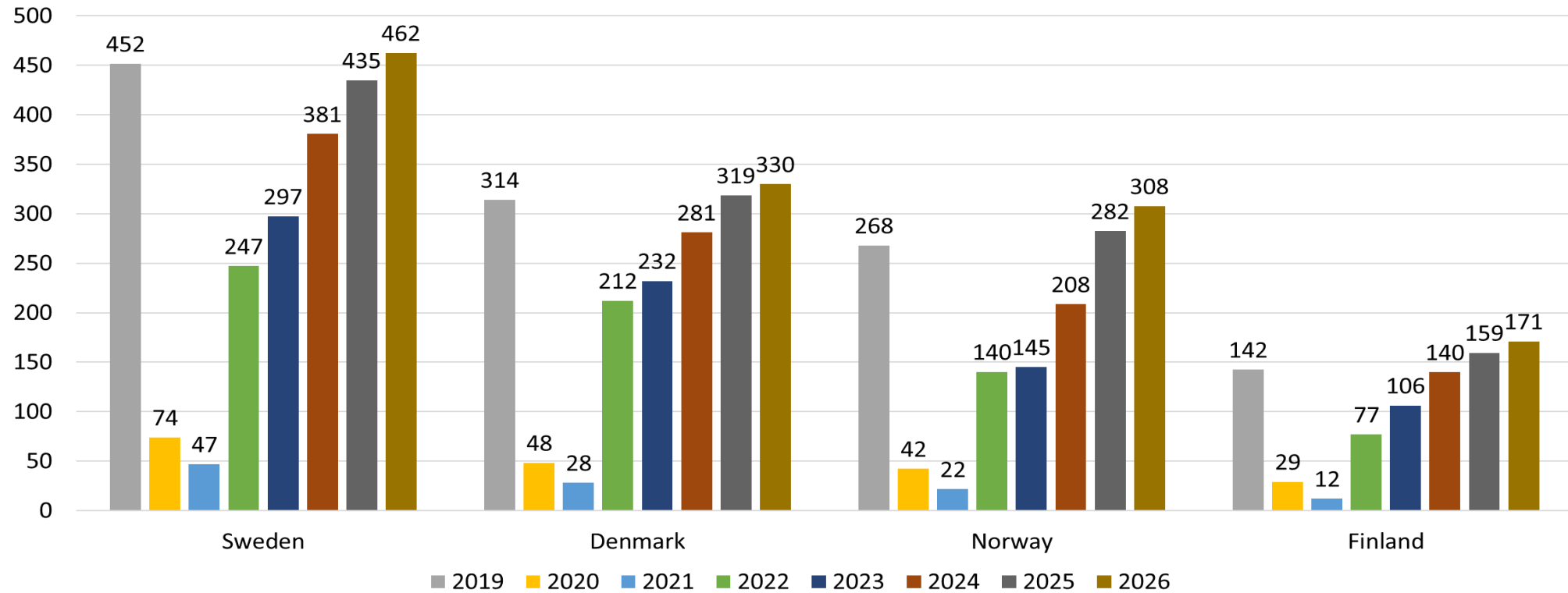


Nordic Countries Travel Outlook



Recovery Forecast - Arrivals

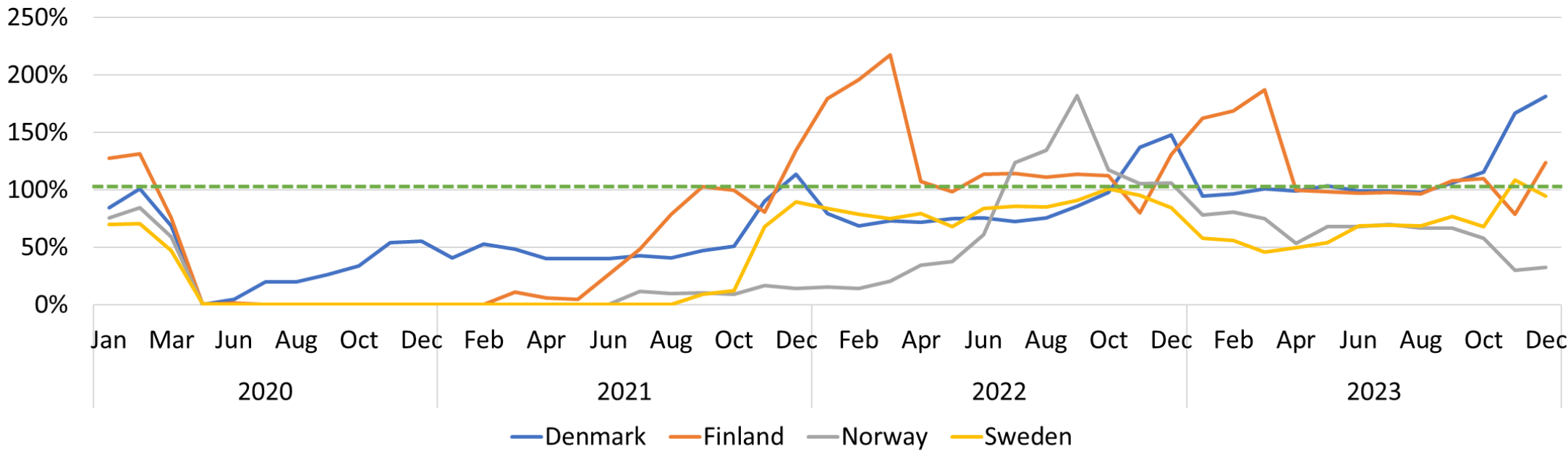
Inbound Visitation to USA
(in 000)



Source: Tourism Economics, December 2022

Accessibility: Operating Air Capacity

**Operating Air Capacity
% of 2019**



Source: Sabre, March 2023

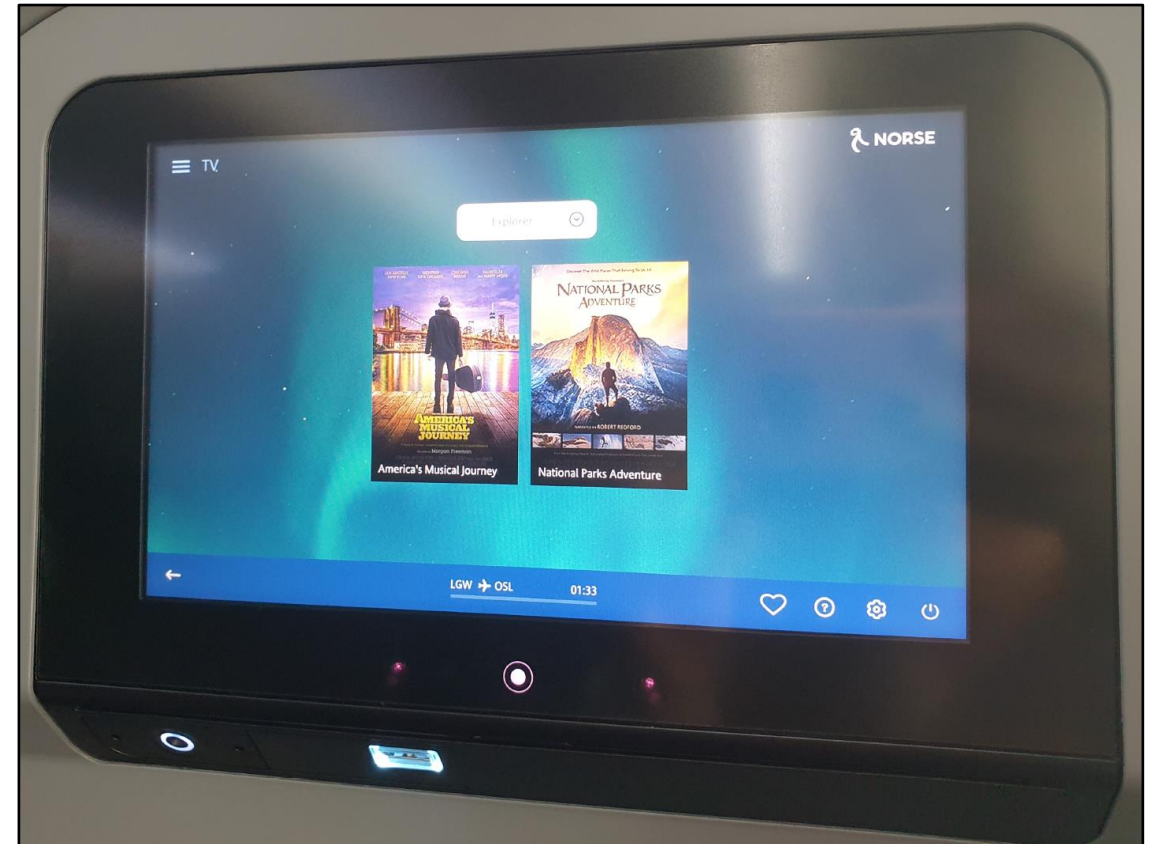
Aviation - U.S. Destinations with Direct Flights from the Nordic Region

SAS, Norse, Play, Finnair, Icelandair, United, Delta

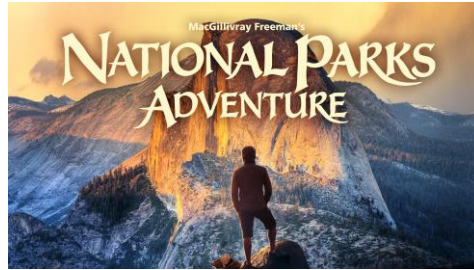
- Boston
- Chicago
- Los Angeles
- Miami
- New York (EWR, JFK, SWF)
- San Francisco
- Washington, D.C.
- Fort Lauderdale
- Orlando
- Baltimore
- Denver
- Detroit
- Minneapolis-St Paul
- Portland
- Raleigh-Durham
- Seattle

Norse Airways - In Flight Entertainment

- Featuring *National Parks Adventure* and *America's Musical Journey* for 6 months (started Dec 2022)
- Both films will be featured on 10 x 787's, operating daily
- All have 338 seats to total 618,540 seats over a 6-month period

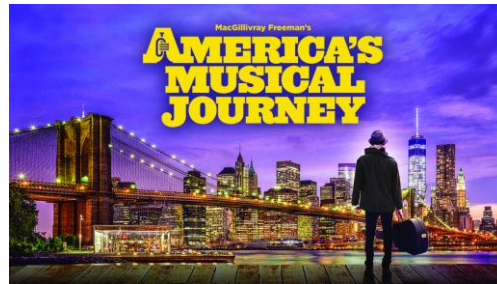


Giant Screen Films



National Parks Adventure

- From red rock canyons and craggy mountain peaks to other-worldly realms found within the USA's most legendary outdoor playgrounds, including Yellowstone, Glacier, Yosemite, and Arches National Parks, *National Parks Adventure* showcases a variety of U.S. destinations and experiences.



America's Musical Journey

- The story of America's musical journey. A cross-country adventure through the musical heritage of America.



Into Nature's Wild

- A celebration of the transformational allure of nature and wild places; is an exhilarating ride via kayak, bike, train, hot air balloon, kite surfboard, and more, into some of the most beautiful and undiscovered terrain of North America.

GoUSA TV



Rakuten TV

- Sweden
- Denmark, including Faroe Islands and Greenland
- Norway
- Finland, including Aaland Islands

Samsung TV Plus

- Live in Sweden
- Launching April 12, 2023, in Norway, Denmark, Finland

LG TV

- Agreed to launch in Denmark, Sweden, Norway, Finland (date TBC)

Plex

- Live in Sweden, Norway, Denmark, Finland

Brand USA Travel Week U.K. & Europe 2023 and Media Forum



Travel Trade Resources



Itineraries

- Over 30 multi-state, road trip itineraries that are both inspirational and bookable through receptive tour operators





USA Discovery Program

- Online agent training program made up of over 60 modules, all about the variety and diversity of experiences available in the USA

Key Visuals

In the folders linked below, you'll find a selection of key visuals in .jpg format. We've included a selection of thumbnails for quick browsing here, and you can view the full library of available images for each destination and download files by clicking on the links to the corresponding folders within Brand USA's Digital Asset Management (DAM) system.

Terms of Use: All rights free on the assets in the toolkit (no credit needed). The section of the terms and conditions that specify crediting when downloading images can be ignored as no credit is needed.

	
Horizontal These are high-res horizontal photos of multiple iconic destinations a...	Vertical These are high-res vertical photos of multiple iconic destinations and...
Show more	Show more
Link to Assets	Link to Assets

Images and Videos

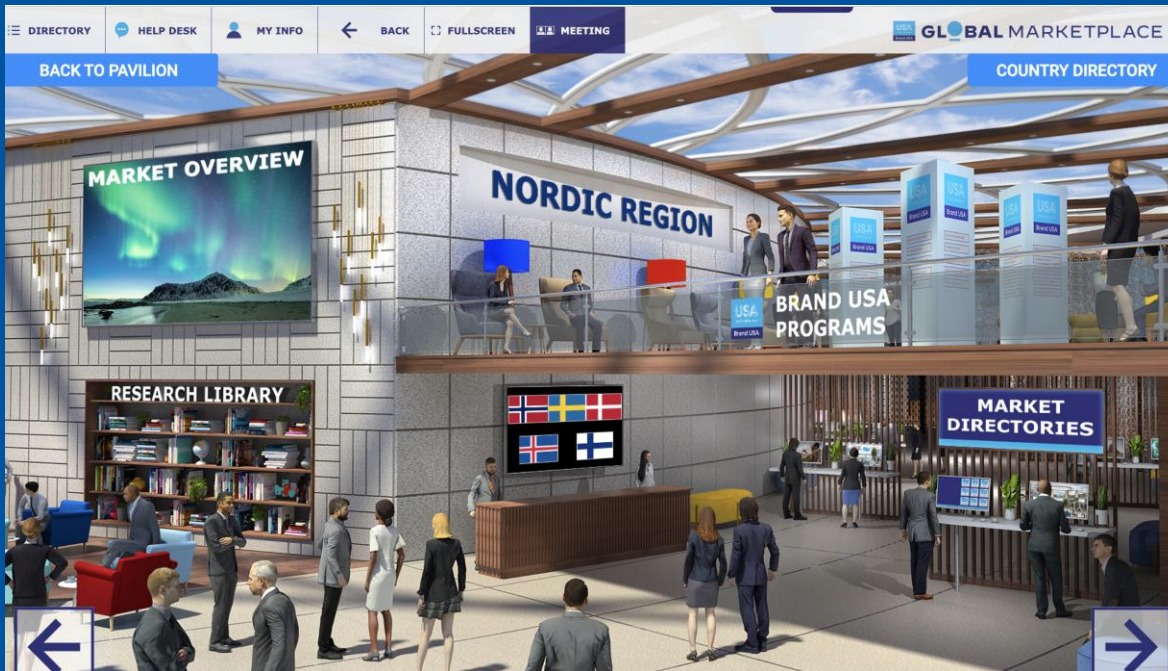
- Eye catching, rights-free images and videos that can be used by the trade on their channels

Brand USA Global Marketplace International Pavilion

Market orientation and
market updates

Market directories with key
contact information (tour
operators, consumer and trade
media, Discover America
Committees)

Research - Brand USA's
Interactive Market Data, NTT0



Brand USA Talks Travel

- You've got questions... we've got answers!
- Our podcast, "Brand USA Talks Travel," elevates the conversation concerning international travel to the United States by speaking with leaders in our industry
- Subscribe to hear key answers to timely questions
- "Brand USA Talks Travel" is available via Apple Podcasts, Spotify, Stitcher, iHeart and Amazon Music



International Storytelling Pillars

The Great Outdoors

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graph TD; A[The Great Outdoors] --> B[Sports Tourism]; B --> C[Luxury]; C --> D[Culinary Journeys]; D --> E[As Seen on Screen];
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Sports Tourism

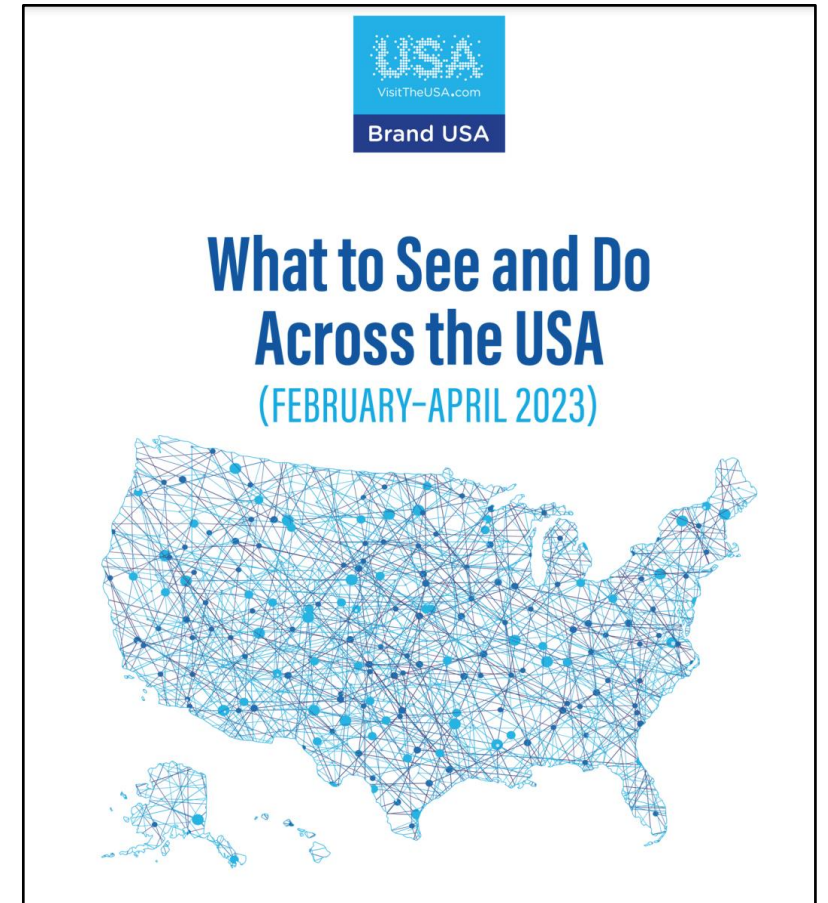
Luxury

Culinary Journeys

As Seen on Screen

What's New in the USA

- Quarterly document that is a calendar of events, ordered geographically, that provides a snapshot of key happenings in the U.S
- Includes new transport routes, hotel openings, festivals, sporting events and upcoming films or TV series
- Available on our website for trade and media to stay updated with partner news
- Next iteration will be ready for IPW



Looking Ahead

- Considering roadshows in key Nordic cities
- Fams with airline partners
- How can Brand USA support you in this market?





THANK YOU