



# Perceptions of the USA among International Leisure Travelers

Report prepared by STR

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## Introduction

STR is pleased to provide you with this report for your business to show our appreciation for your support and partnership.

The travel industry faces unprecedented challenges due to COVID-19. A 'new normal' now exists in which trends and strategies are re-written to adapt to a post COVID-19 world.

To help you understand international leisure traveler perceptions and attitudes towards the USA and to assist in preparations and strategies for recovery, this report presents findings from data gathered among 1,807 travelers from Australia, Canada and the United Kingdom in March and April 2020.

## About This Report

This report evaluates attitudes and perceptions of the USA by international leisure travelers from Australia, Canada and the United Kingdom. The report contains the following sections:

### Research Background:

- Overview information about the research and participants surveyed

### USA Perceptions:

- Perceptions of the USA, both positive and negative

### Appeal of the USA:

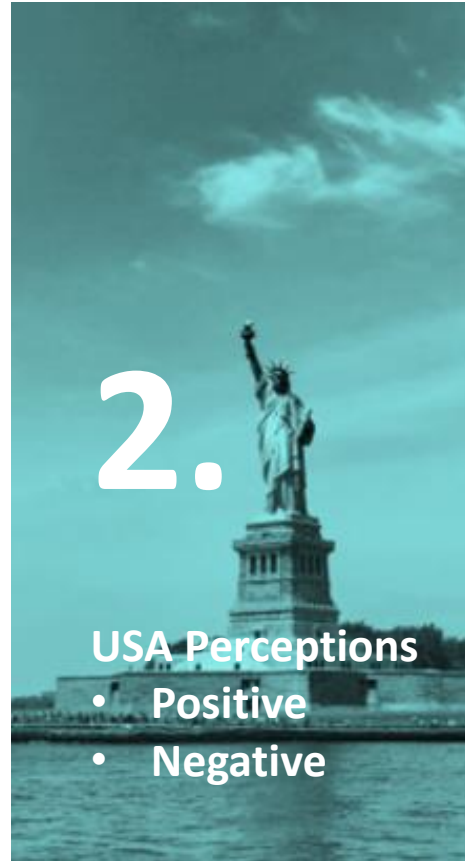
- Evaluative information on history, culture, society and accessibility

### Likelihood of Visiting the USA:

- Rating of the likelihood of visiting



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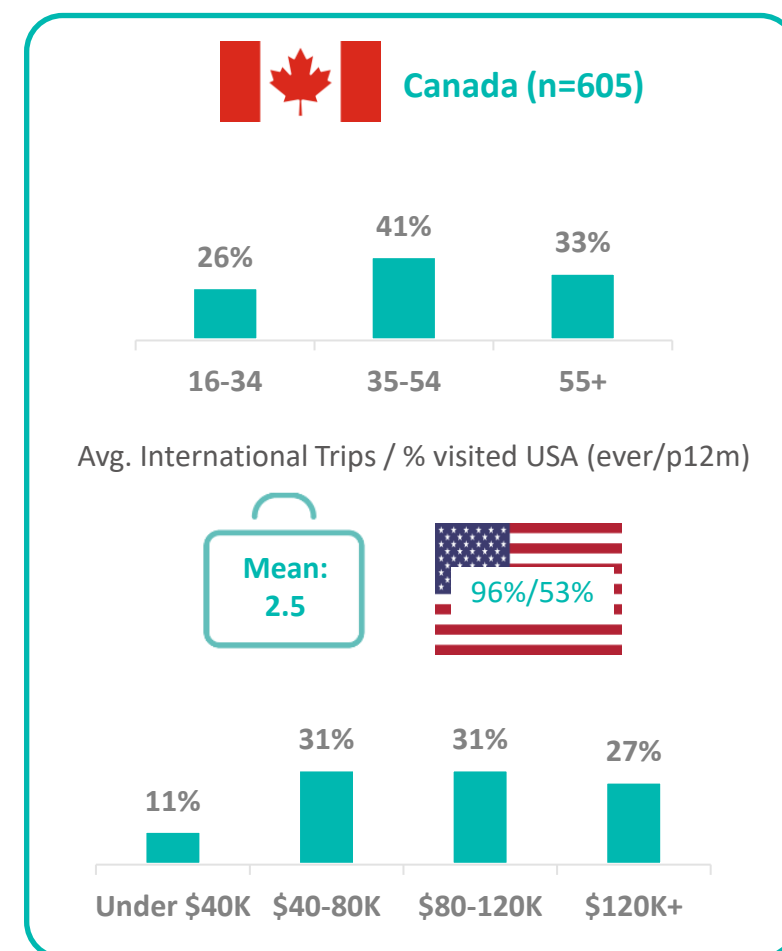
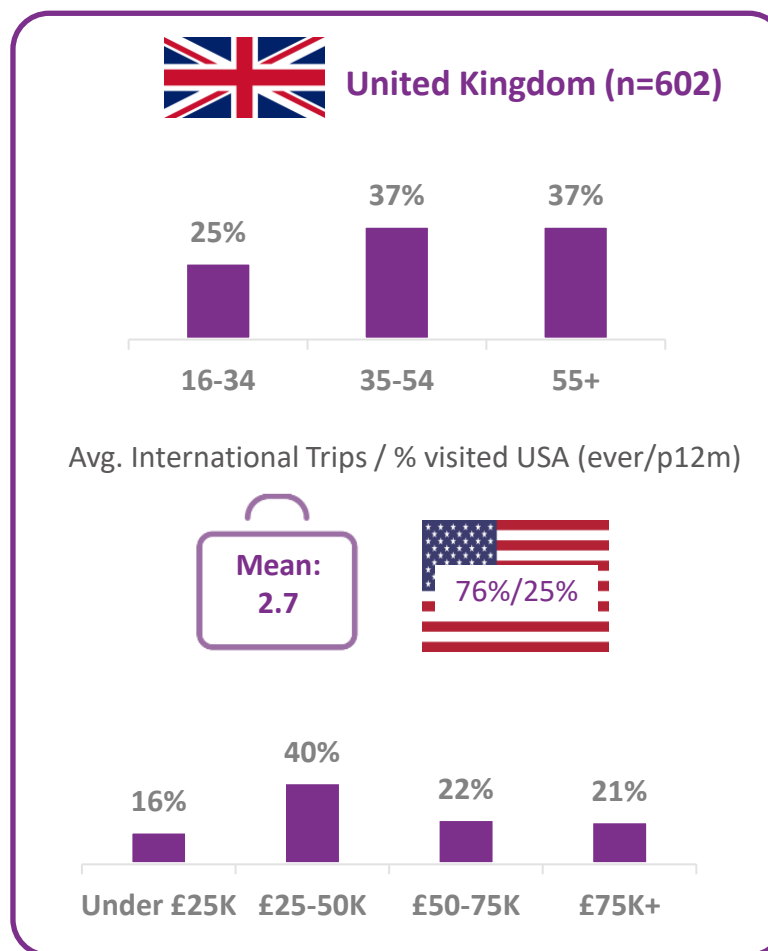
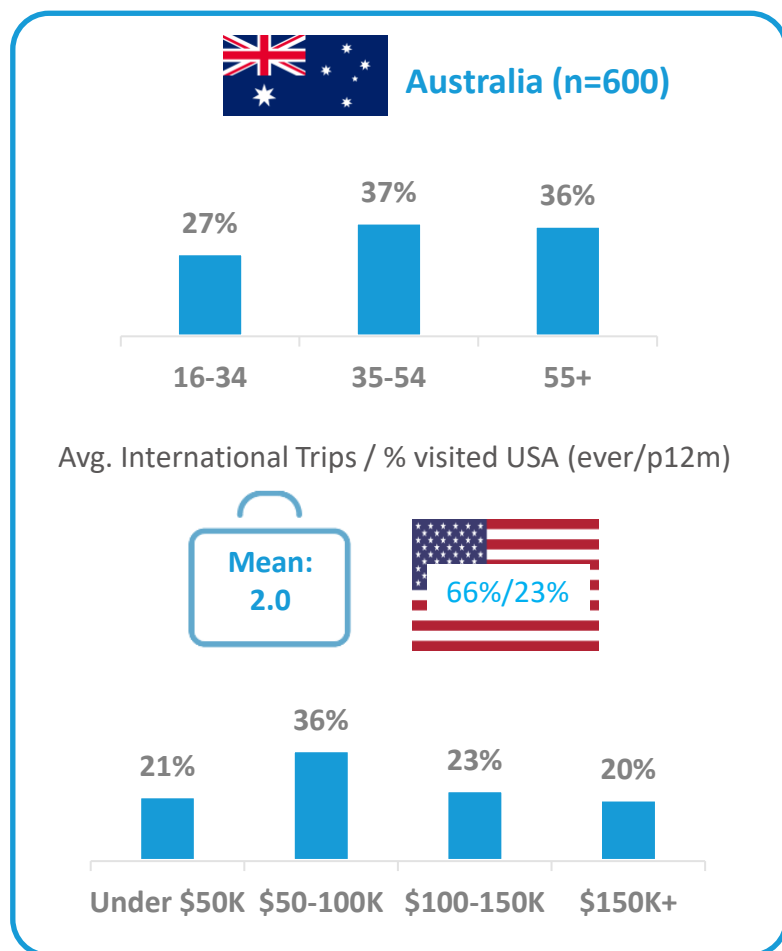




# Research Background



Online interviews were conducted in March and April 2020 with 1,800+ international leisure travelers across three key English-speaking markets: Australia, Canada and the United Kingdom. Respondents from all three countries were equally divided between males and females. Additional traveler demographics and travel behavior are outlined below. Notable are the high levels of USA visitation across all the three countries.



Q. What is your age? How many international leisure trips in past 12 months? Visited the USA ever and in the past 12 months? Gross annual household income (in local currency)?





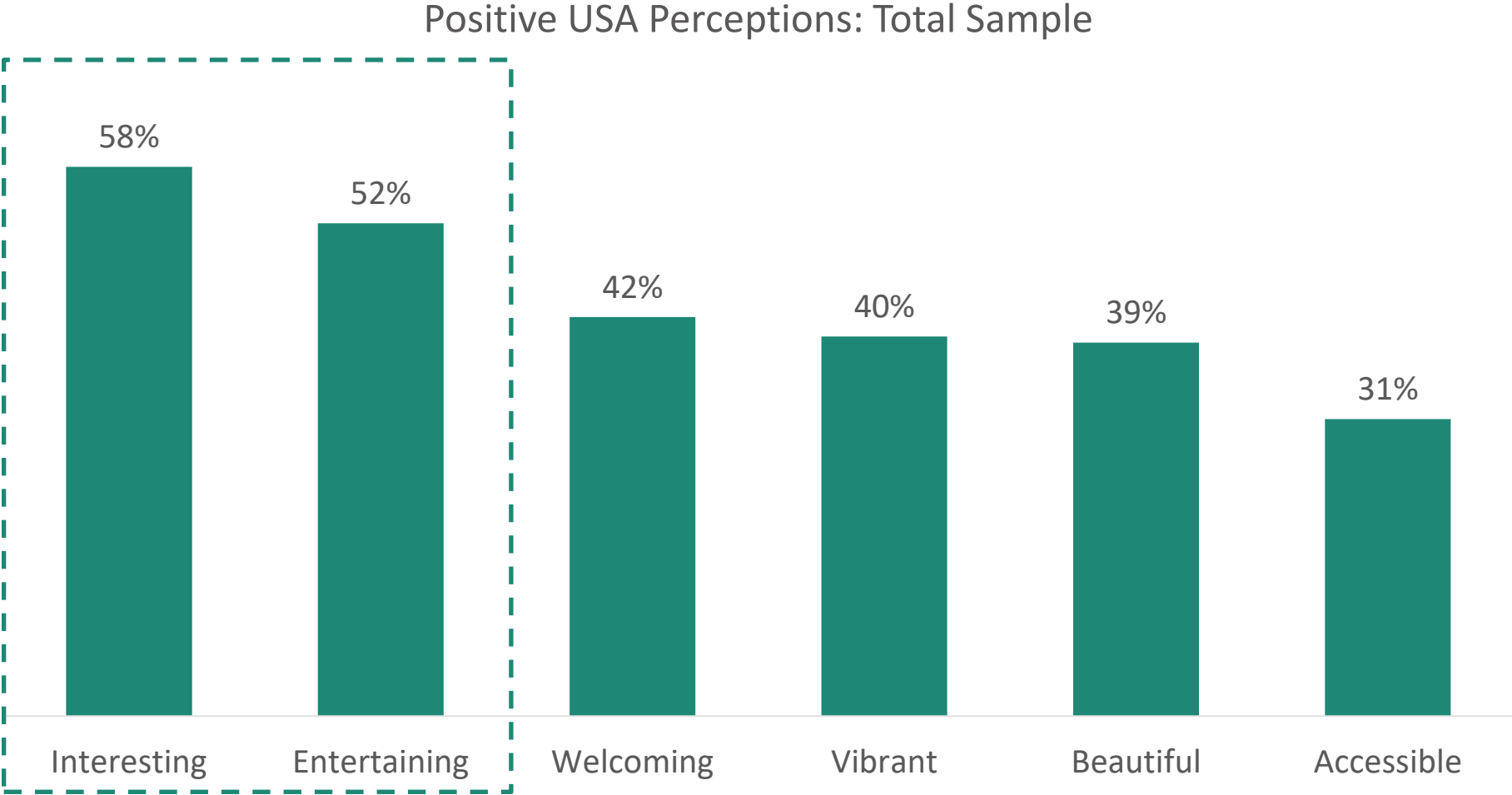
# Perceptions of the USA





Q: When you think of the USA, what appealing tourism destinations and cities do you think of?  
List your top 3 destinations / N=1,807 (Australia, United Kingdom, Canada)

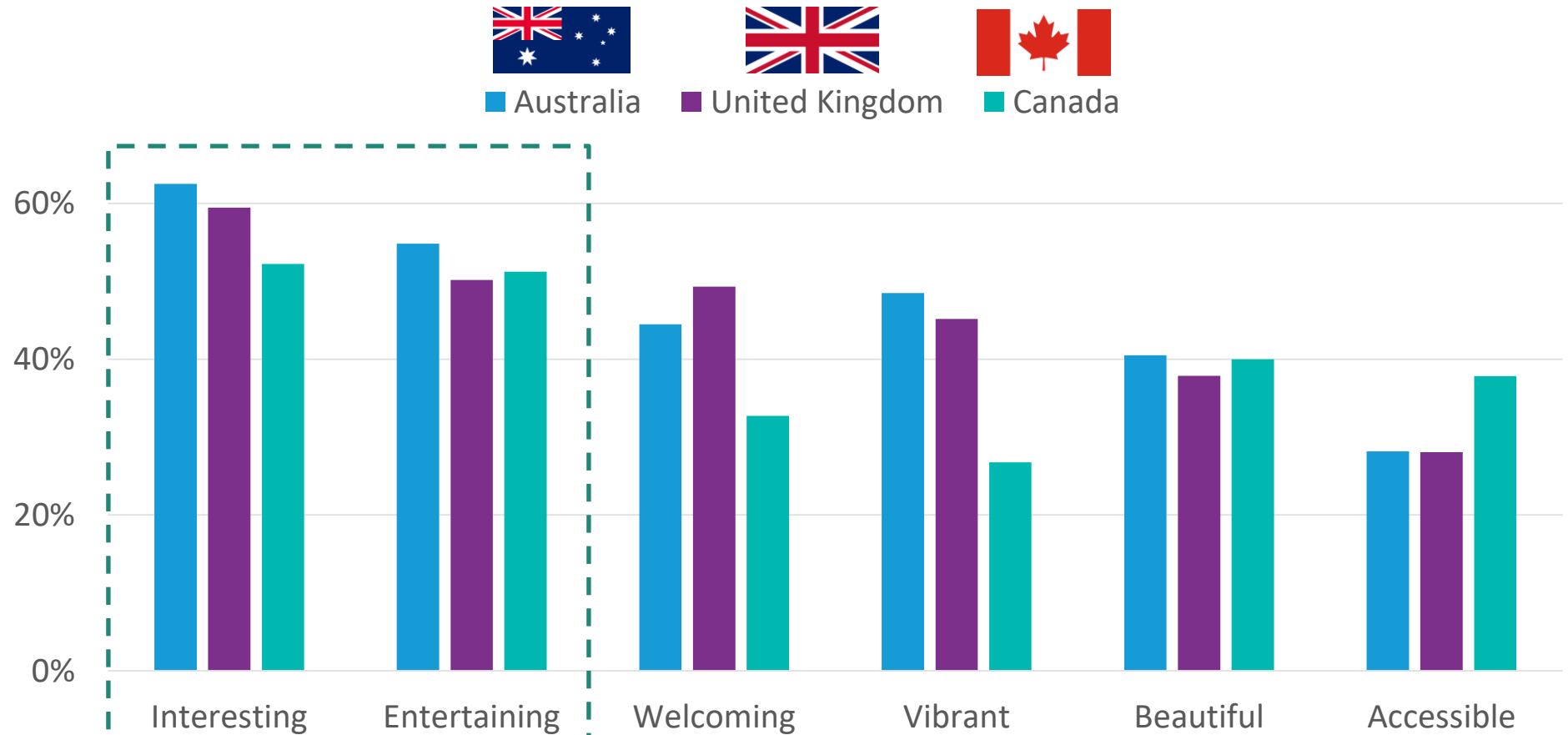
**Interesting** and **entertaining** are the top USA perceptions among international leisure travelers; **welcoming, vibrant** and **beautiful** tie broadly for 3<sup>rd</sup> place with **accessible** placing last. These characteristics represent the USA “halo” under which all USA destinations can choose to accentuate or tone down depending on their specific features and overall strategy.



Q: Which, if any, of the following associations do you have of the USA as a visitor destination? / N=1,807 (Australia, United Kingdom, Canada)



Travelers from all three countries agreed that **interesting** and **entertaining** are top positive USA associations. Canadians are less positive about the USA as a **vibrant** and **welcoming** place compared to Australian and United Kingdom travelers, and are more positive about **accessibility** which is not surprising given Canada's proximity to the USA. Notable is Australian's association with **accessibility** equaling the United Kingdom even though Australia is much further away.

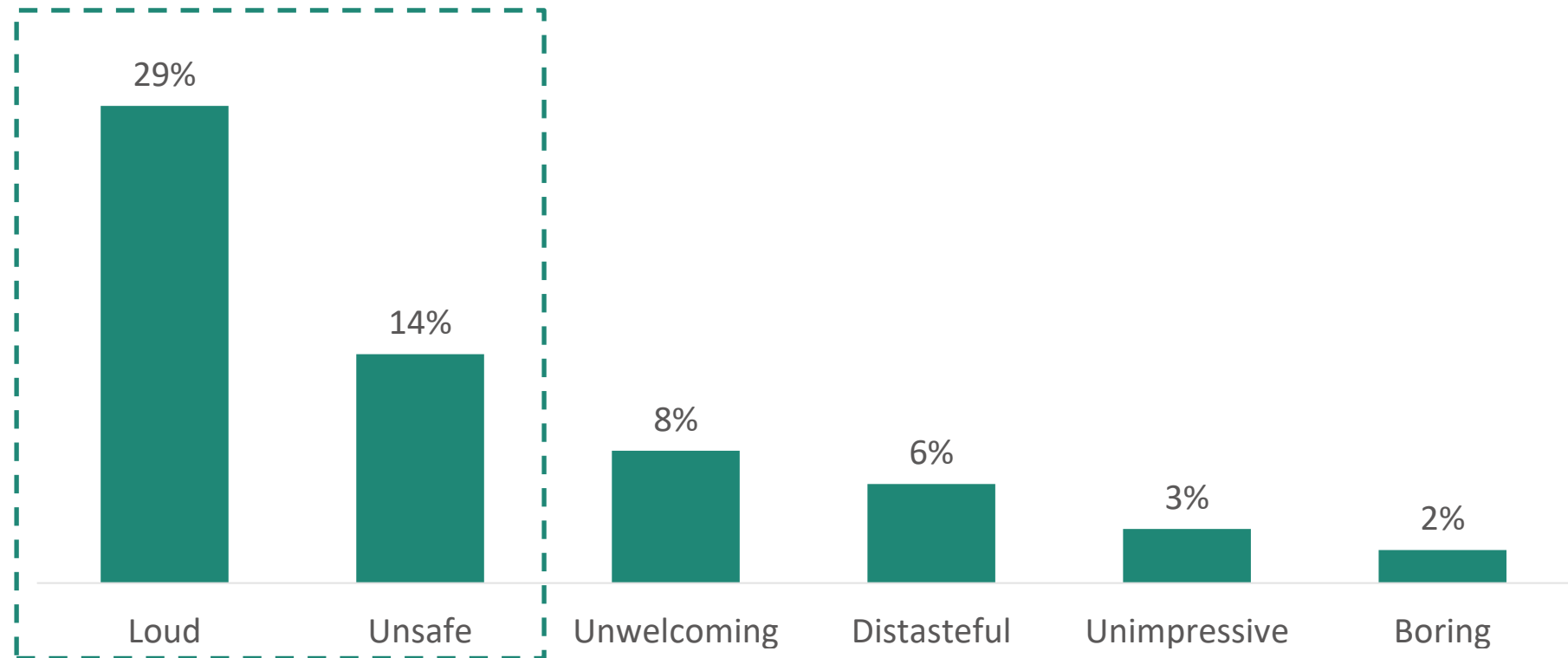


Q: Which, if any, of the following associations do you have of the USA as a visitor destination? / Australia N=600, United Kingdom N=602, Canada N=605

The US avoids most negative associations presented to international leisure travelers. The top negative association is **loud** followed by **unsafe**; all other negative associations are reported by less than one in ten travelers. As with the positive characteristics, these negatives represent the USA “halo” under which all USA destinations can choose to either highlight the lack of this characteristic or disregard depending on their specific features and overall strategy.

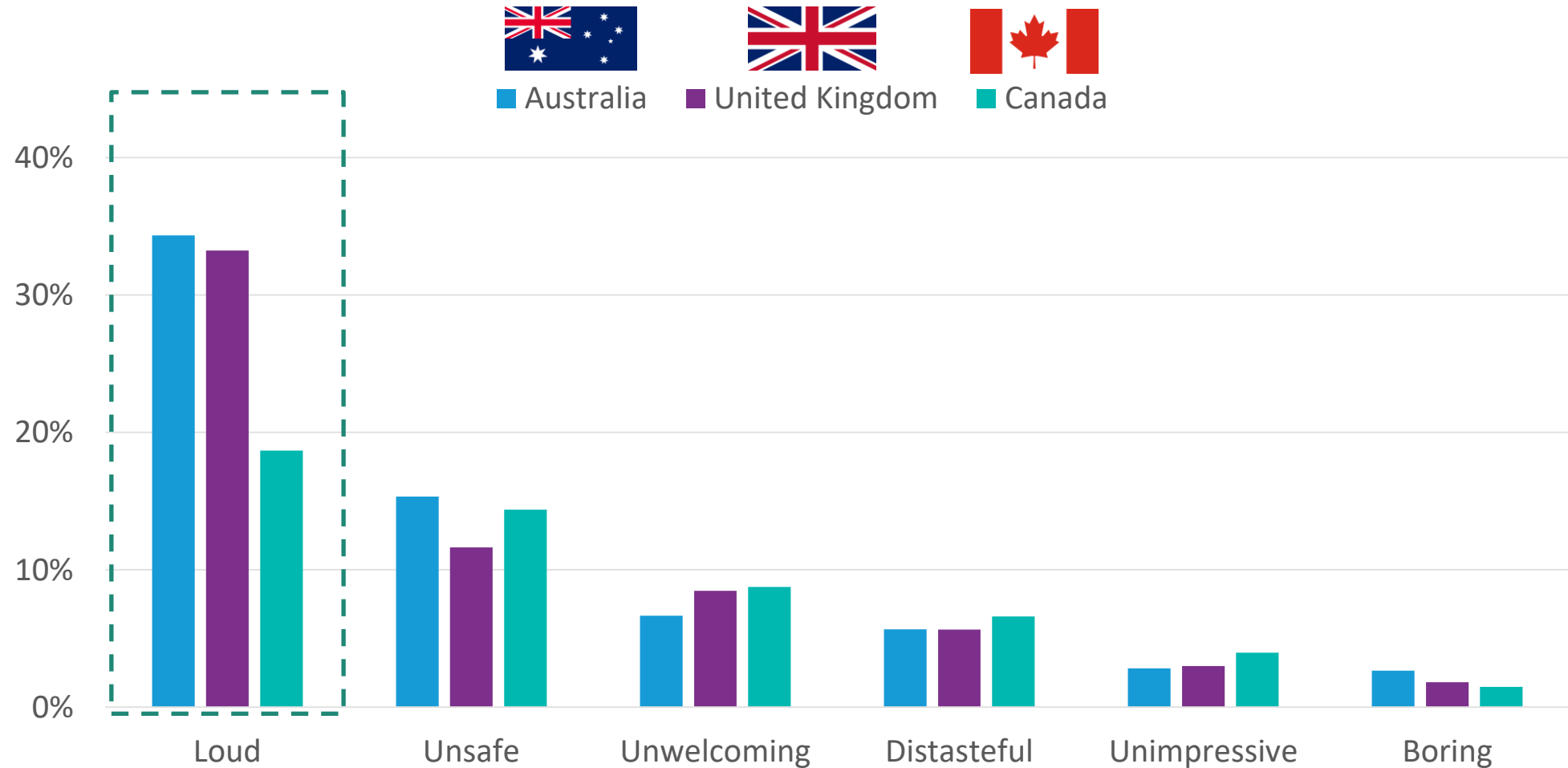


Negative USA Perceptions: Total Sample



Q: Which, if any, of the following associations do you have of the USA as a visitor destination? / N=1,807 (Australia, United Kingdom, Canada)

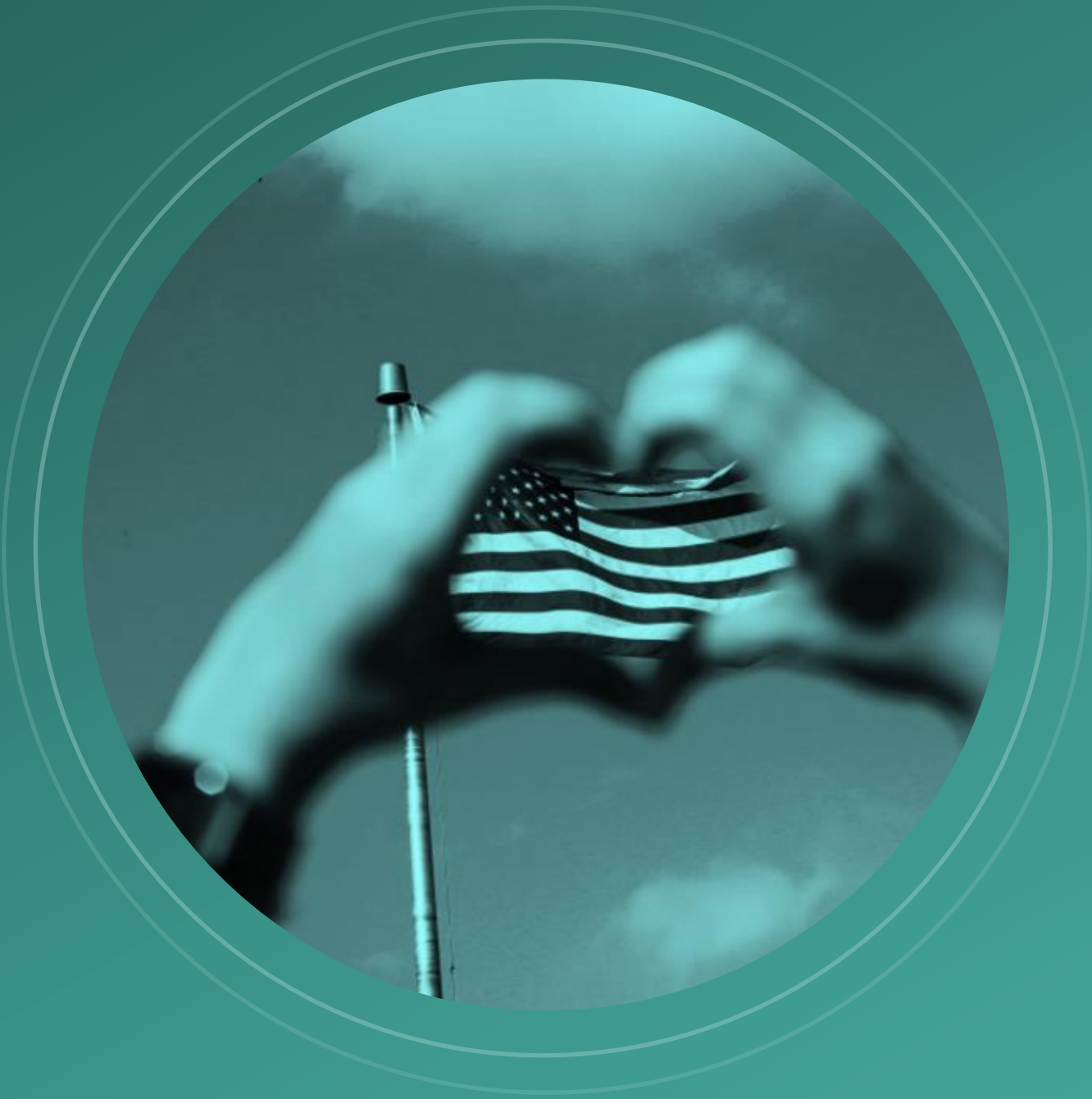
While travelers from all three countries agree that **loud** is the top negative US association, Australians and United Kingdom travelers are much more likely to mention this compared to Canadians. There are no significant differences between the three countries on the other five negative associations.



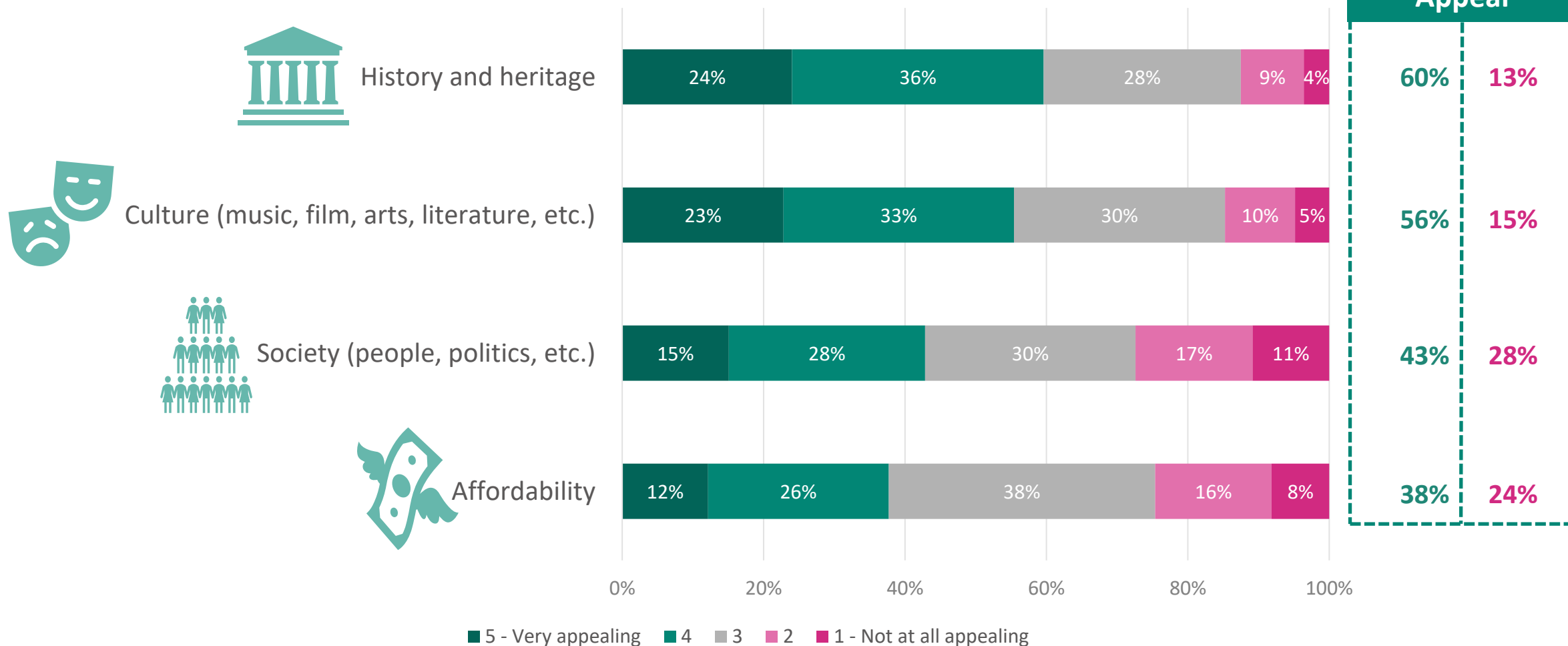
Q: Which, if any, of the following associations do you have of the USA as a visitor destination? / Australia N=600, United Kingdom N=602, Canada N=605



# Appeal of the USA



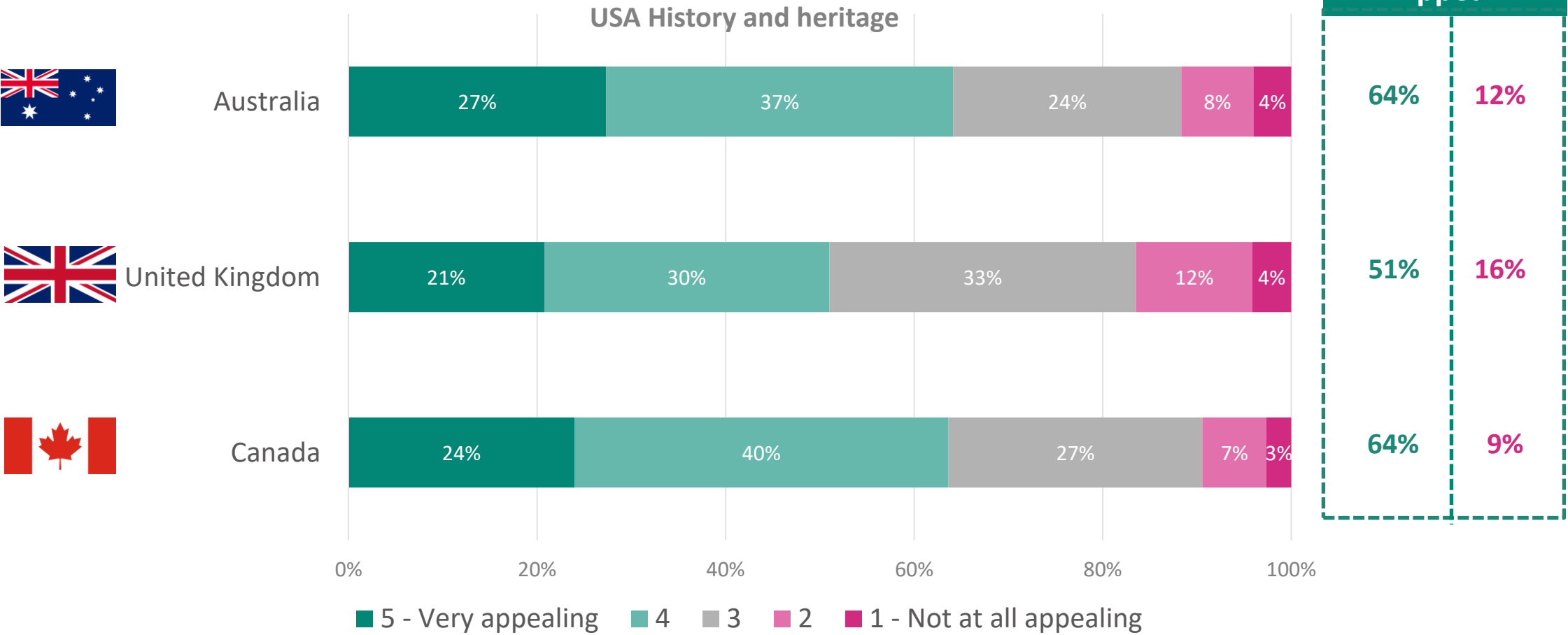
**History and heritage**, and **culture** of the USA hold the most appeal among international leisure travelers; **society** and **affordability** hold relatively less appeal with about one quarter of travelers rating the USA as unappealing regarding these aspects.







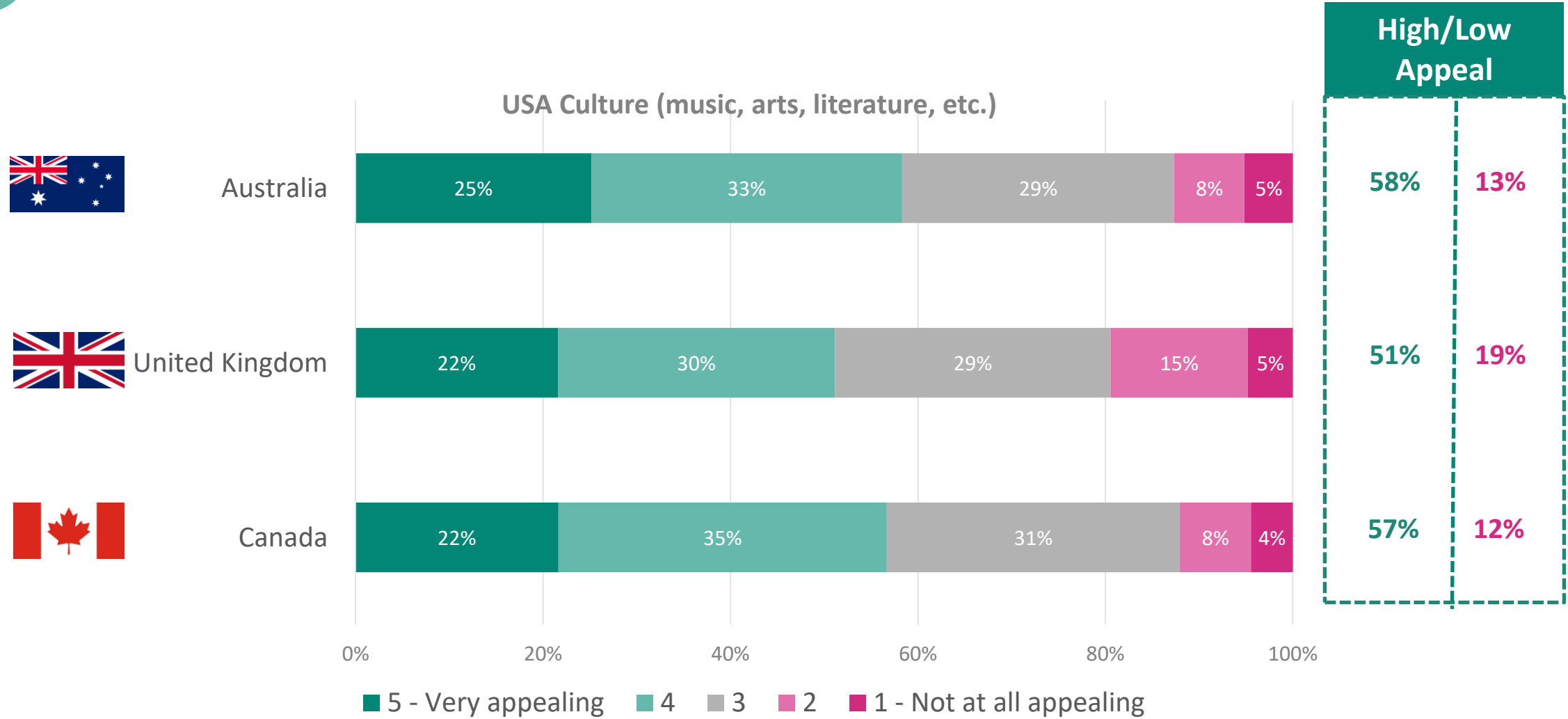
Most Australian and Canadian travelers find USA **history and heritage** appealing. United Kingdom travelers are not quite convinced with equal proportions finding USA **history and heritage** appealing and neutral/unappealing.



Q: Thinking about the USA in general, how would you rate the appeal of the USA in the following areas? / Australia N=600, United Kingdom N=602, Canada N=605



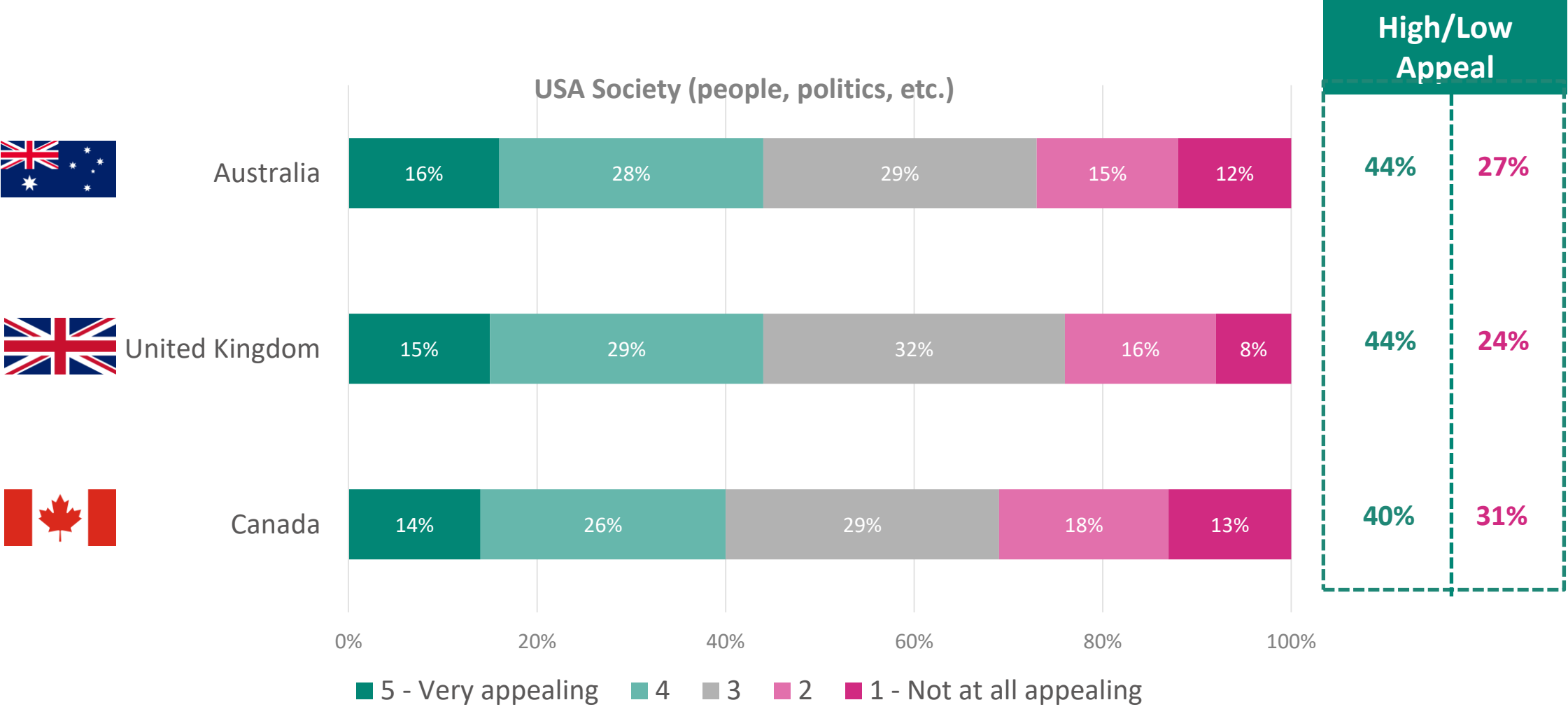
Like history and heritage, most Australian and Canadians find USA **culture** appealing. United Kingdom travelers also find **culture** appealing although there is a hold-out group reporting USA **culture** as unappealing.



Q: Thinking about the USA in general, how would you rate the appeal of the USA in the following areas? / Australia N=600, United Kingdom N=602, Canada N=605



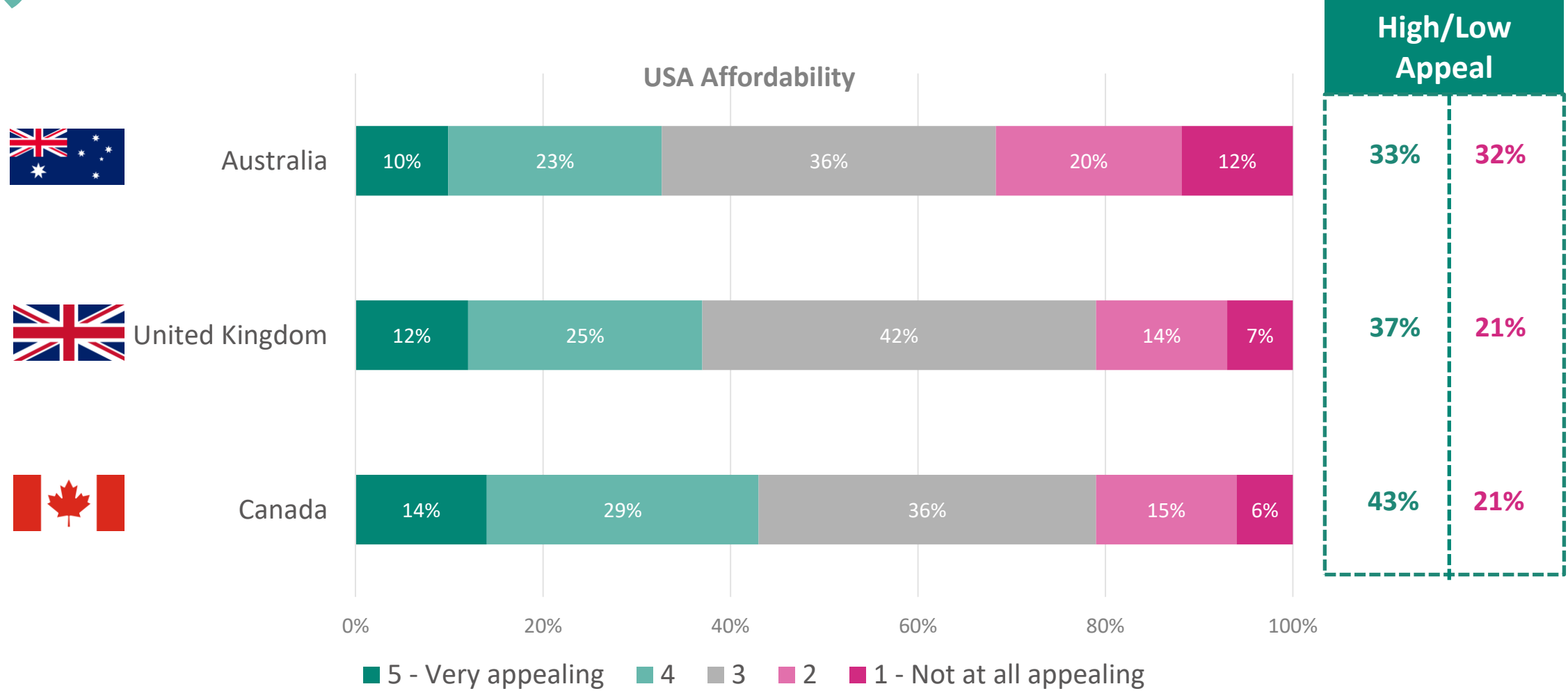
The appeal of USA **society** is mixed. Just under half of travelers from all three countries find US **society** appealing. More Canadians and Australians find US **society** unappealing compared to United Kingdom travelers.



Q: Thinking about the USA in general, how would you rate the appeal of the USA in the following areas? / Australia N=600, United Kingdom N=602, Canada N=605



Distance seems to have an influence on ratings of the USA in terms of **affordability**. Canadians rate the USA as the most appealing for **affordability** followed by United Kingdom travelers and Australians. An almost equal proportion of Australians rate the USA as unappealing for **affordability**.



Q: Thinking about the USA in general, how would you rate the appeal of the USA in the following areas? / Australia N=600, United Kingdom N=602, Canada N=605

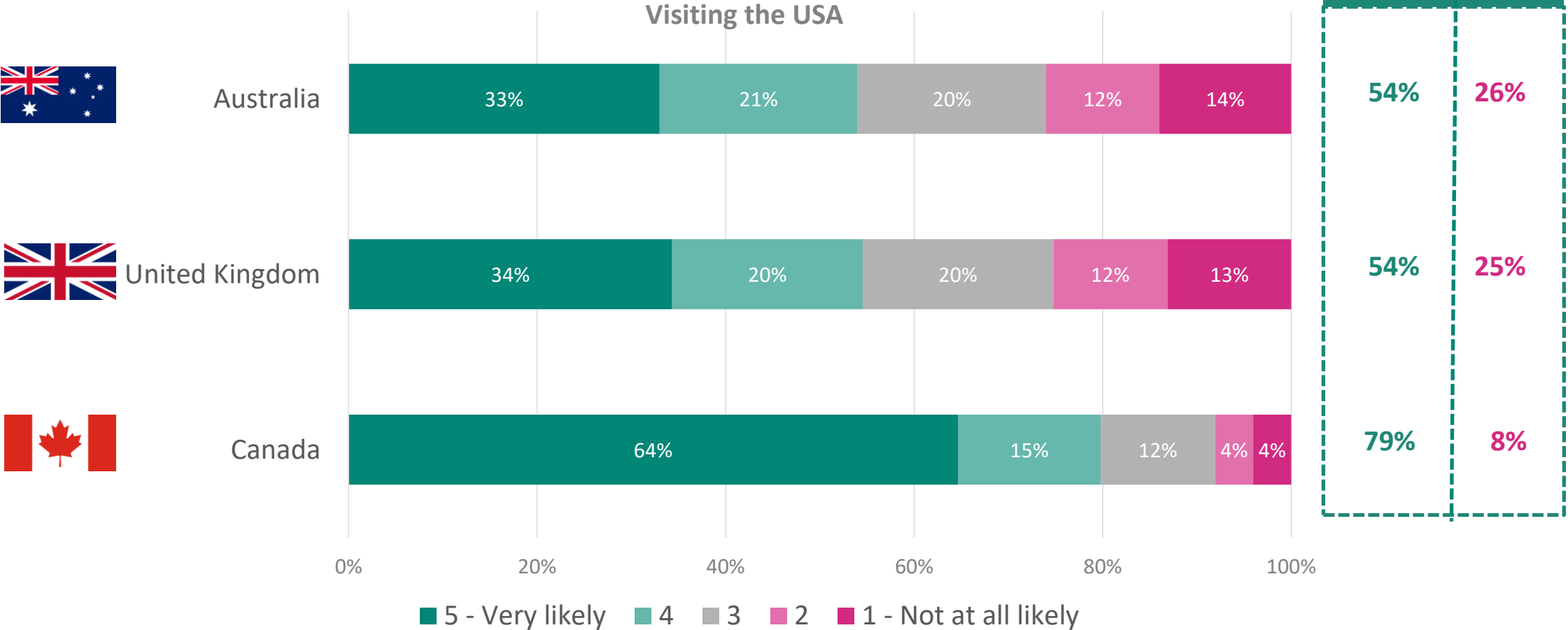


# Likelihood of Visiting the USA





Canadians are most likely to visit the USA which is expected given Canada’s proximity to the US. United Kingdom travelers and Australians are equally likely to visit the USA with over half from each country responding positively. On the flip side, about one quarter of United Kingdom and Australian travelers are not likely to visit the USA in the next five years.





# Take Aways

# Take-Aways



International leisure travelers from Australia, the United Kingdom and Canada find a wide variety of USA destinations as desirable places to visit. The top of mind most desirable markets tend to be on the East or West coast of the USA. International leisure travelers agree on the top perceptions of the USA.

Marketing the USA is an enormous undertaking because of the diversity of destinations. Perceptions of the USA provide a halo over which destination specific marketing can effectively operate. Understanding international leisure traveler perceptions of the USA as an interesting and entertaining place to visit is a key first step for any US destination marketer.

History and Heritage, and Culture are the most appealing characteristics of the USA among international leisure travelers from the three countries sampled. USA Society and Affordability hold less appeal but are still important considerations for any USA destination.

Focusing on History and Heritage, and Culture will assist marketers in highlighting what makes their destination unique because it is in these areas that the USA holds the most appeal among international leisure travelers. USA Society and Affordability are possible areas to highlight but should be approached carefully because of their more polarizing appeal.

Canadians are most likely to visit the USA due, in part, because of the USA's proximity to Canada. Notable is that Australians are as likely as United Kingdom travelers to visit the USA even though Australia is much further away.

Not surprisingly, Canada should be the top target for all USA destinations hoping to attract international leisure travelers because of Canada's proximity to the USA. There appears to be more opportunity with Australian travelers compared to United Kingdom travelers. Considerations should be given depending on a destination specific strategy and other factors such as airlift and seasonality.



# Would you like more information?

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**HOTEL DATA  
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# Appendix: Survey questions



## Profile of Respondents

- Where do you live?
  - *Australia, Canada, United Kingdom*
- What is your gender?
  - *Male, Female, Other, Prefer not to say*
- Which age group do you belong to?
  - *16-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75+*
- What is your gross annual household income range?
  - *Region specific income ranges and currencies*

## Travel Habits & Plans

- Please tell us which country(ies) you have visited in the last 12 months?
  - *Americas: Argentina, Brazil, Canada, Chile, Cuba, Dominican Republic, Mexico, Peru, Puerto Rico, United States, Other American Country,*
  - *Europe: Austria, France, Germany, Greece, Italy, Netherlands, Poland, Portugal, Russia, Spain, Turkey, United Kingdom, Other European Country*
  - *MEA: Bahrain, Egypt, Iran, Israel, Jordan, Morocco, Qatar, Saudi Arabia, South Africa, Tunisia, United Arab Emirates, Other Middle East and African Country*
  - *APAC: Australia, China, Hong Kong, India, Indonesia, Japan, Macao, Malaysia, New Zealand, Singapore, South Korea, Thailand, Vietnam, Other Asia and Pacific Country*
- How many international leisure trips have you been on in the past 12 months?
  - *Open ended numeric answer*
- Have you ever visited the USA? (Yes / No)



# Appendix: Survey questions



## USA Perceptions, Appeal, Likely to Visit

- When you think of the USA, what appealing tourism destinations and cities do you think of? List your top 3 destinations
- Which, if any, of the following associations do you have of the USA as a visitor destination?:
  - *Accessible, Welcoming, Interesting, Beautiful, Vibrant, Entertaining*
- Which, if any, of the following associations do you have of the USA as a visitor destination?:
  - *Unwelcoming, Boring, Distasteful, Unsafe, Loud, Unimpressive*
- Thinking about the USA in general, how would you rate the appeal of the USA in the following areas? (1 - not at all appealing, 5 - very appealing):
  - *Culture (e.g. music, film, arts, literature, etc.)*
  - *Society (e.g. people, politics, etc.)*
  - *History and heritage*
  - *Affordability*
- How likely are you to visit the USA in the next 5 years? (1 – not at all likely, 5 – very likely)