Sweet Home Alabama
www.Alabama.Travel

International Visitor Profiles

TravelSouth USA
All Y'all Are Welcome

Key Findings

1. **2026 projected spending:** $578.5M (+7.2% YOY). Projected visitors: 311.2K (+4.9% YOY).
2. **Top 10 Source Markets by Spending:** UK + Ireland ($78.8M), DACH Region ($51.4M), China ($39.9M), Canada ($38.9M), Brazil ($34.4M), India ($32.2M), Japan ($28.1M), Italy ($19.4M), France ($19.1M), South Korea ($14.2M).
3. **Top 5 Growth Markets (Spending YOY):** Bulgaria (+18.4%), Taiwan (+18.0%), Israel (+15.7%), Singapore (+15.4%), Philippines (+14.0%).
4. **Top 5 Declining Markets (Spending YOY):** Iran (-11.1%).
5. UK + Ireland leads by spending ($78.8M). Canada leads by visits (57.0K).
6. **CAGR:** 2023-2027 projected spending CAGR (7.5%) exceeds 2015-2019 (4.0%).
7. **Visitor Perceptions (Intl Markets):** 67% familiarity, 75% appeal, 41% likely to visit in the next 5 years.
8. **U.S. Trip Profile (Intl Markets):** Average spending $5,049. Average stay: 12.3 days. Average destinations: 4.4.
9. **Top Motivation:** For rest and relaxation (45%)
10. **Preferred Tone:** Friendly/welcoming (45%)
11. **Top Barrier:** Political issues/unrest (64%)

Source: Tourism Economics, Feb 2026; Future Partners, Mar 2026

Alabama

$578.5M
2026 Projected Spending
+7.2% YOY vs. 2025

311.2K
2026 Projected Visitors
+4.9% YOY vs. 2025

$534.5M
2026 Overseas Spending
+7.2% YOY vs. 2025

243.4K
2026 Overseas Visitors
+5.0% YOY vs. 2025

$539.8M
2025 Projected Spending
+0.4% YOY vs. 2024

296.7K
2025 Projected Visitors
-6.6% YOY vs. 2024

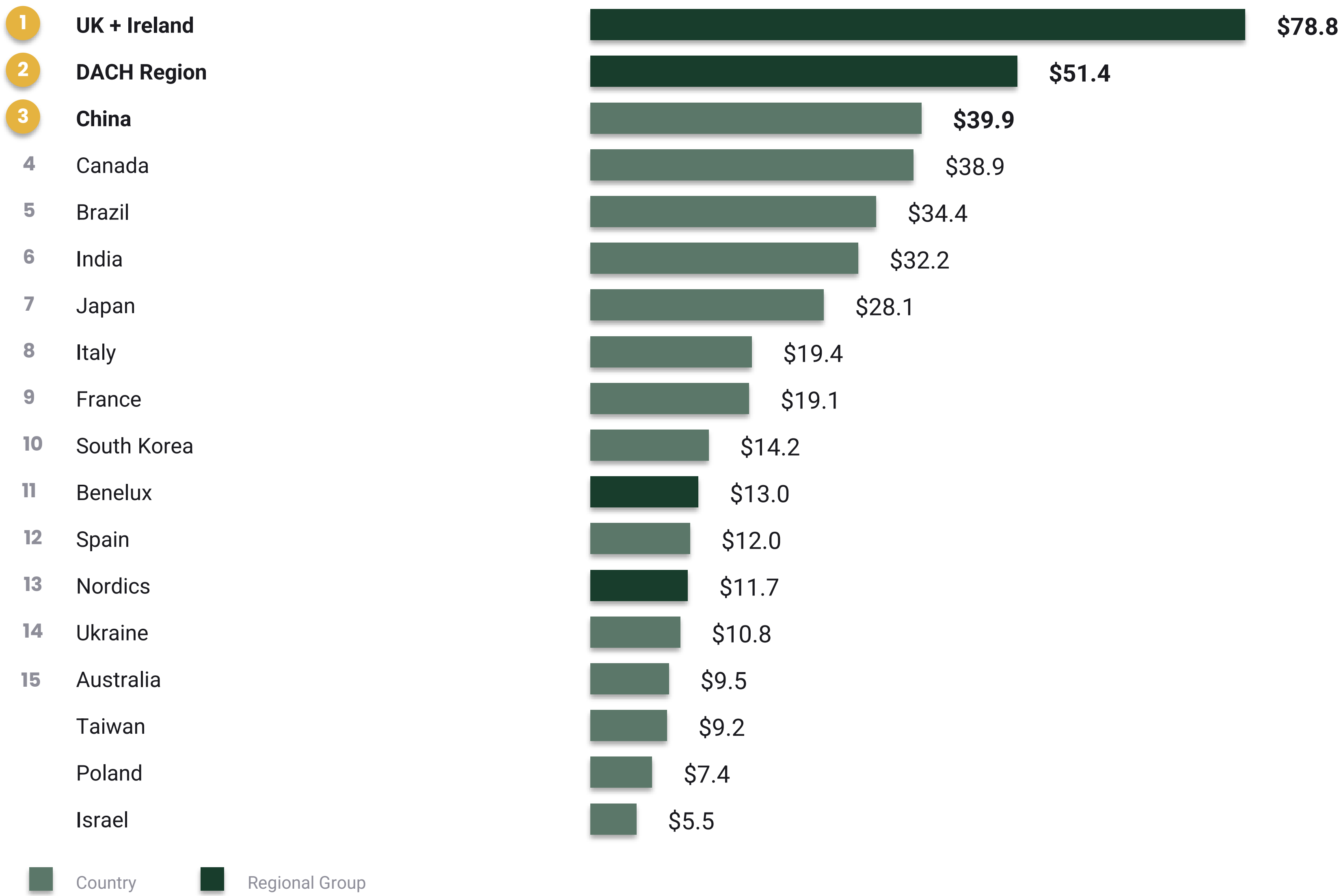
$498.4M
2025 Overseas Spending
+2.6% YOY vs. 2024

231.8K
2025 Overseas Visitors
-3.2% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Top Source Markets | 2026 Projections

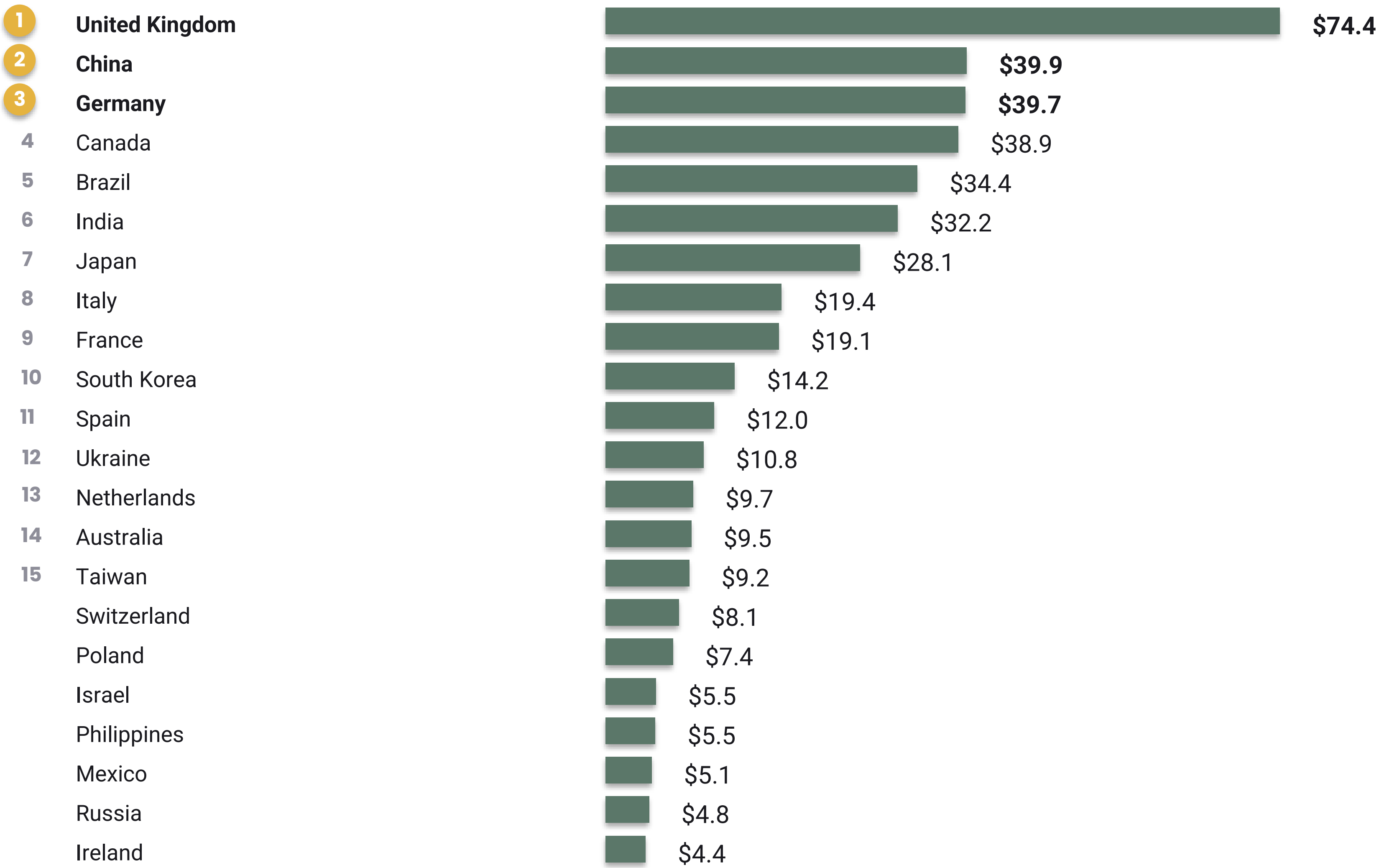
Spending ($ millions) by market | Includes Nordics, Benelux, DACH, UK + Ireland



Source: Tourism Economics, Feb 2026

Top Source Markets | 2026 Projections | Detailed

Spending ($ millions) by individual country



Source: Tourism Economics, Feb 2026

Top Markets Detail | 2026 Projections

Spending ($M), visits (K), and YOY % change

#	Market	Spending ($M)	Visits (K)	Spend Δ%	Visits Δ%
1	United Kingdom	$74.4	31.8	+3.9%	+5.3%
2	China	$39.9	12.8	+6.3%	+5.7%
3	Germany	$39.7	15.9	+10.4%	+6.0%
4	Canada	$38.9	57.0	+6.5%	+4.9%
5	Brazil	$34.4	8.4	+8.8%	+5.0%
6	India	$32.2	16.2	+8.7%	+3.9%
7	Japan	$28.1	18.1	+7.0%	+7.8%
8	Italy	$19.4	11.4	+6.9%	+4.5%
9	France	$19.1	12.4	+6.3%	+4.1%
10	South Korea	$14.2	9.8	+4.5%	+5.1%
11	Spain	$12.0	6.8	+13.2%	+5.3%
12	Ukraine	$10.8	1.0	+8.8%	+3.5%
13	Netherlands	$9.7	5.0	+9.2%	+6.1%
14	Australia	$9.5	3.5	+5.4%	+3.2%
15	Taiwan	$9.2	4.2	+18.0%	+8.7%
16	Switzerland	$8.1	3.4	+12.9%	+7.4%
17	Poland	$7.4	4.3	+4.2%	-0.4%
18	Israel	$5.5	3.8	+15.7%	+4.0%
19	Philippines	$5.5	2.9	+14.0%	+8.5%
20	Mexico	$5.1	10.8	+6.5%	+2.4%
21	Russia	$4.8	1.5	+8.2%	+10.5%
22	Ireland	$4.4	2.9	+6.3%	+4.9%

Source: Tourism Economics, Feb 2026

% Change | 2025 Projections vs. 2024

Year-over-year spending and visits change by source market

#	Market	Spending %Δ	Visits %Δ
1	United Kingdom	+12.8%	+0.3%
2	China	+3.7%	-4.0%
3	Germany	+5.2%	-11.7%
4	Canada	-23.4%	-20.8%
5	Brazil	+13.7%	+0.4%
6	India	-6.5%	-6.2%
7	Japan	+10.4%	+4.7%
8	Italy	+11.6%	+4.1%
9	France	-3.9%	-7.4%
10	South Korea	-14.9%	-4.1%
11	Spain	+11.6%	+0.7%
12	Ukraine	+32.3%	+5.6%
13	Netherlands	+11.2%	-8.4%
14	Australia	-13.8%	-4.0%
15	Taiwan	+30.5%	+6.4%
16	Switzerland	-23.5%	-11.4%
17	Poland	-4.1%	+2.9%
18	Israel	-7.4%	+13.6%
19	Philippines	-9.4%	-15.2%
20	Mexico	+3.9%	+8.6%
21	Russia	+6.5%	+4.5%
22	Ireland	-3.2%	+0.7%

Decline Growth

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015-2019 CAGR

4.0%
Spending

3.5%
Visits

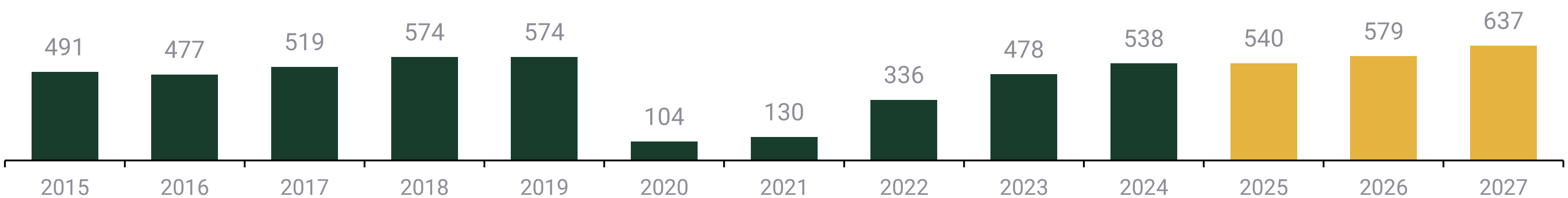
2023-2027 PROJECTED CAGR

7.5%
Spending

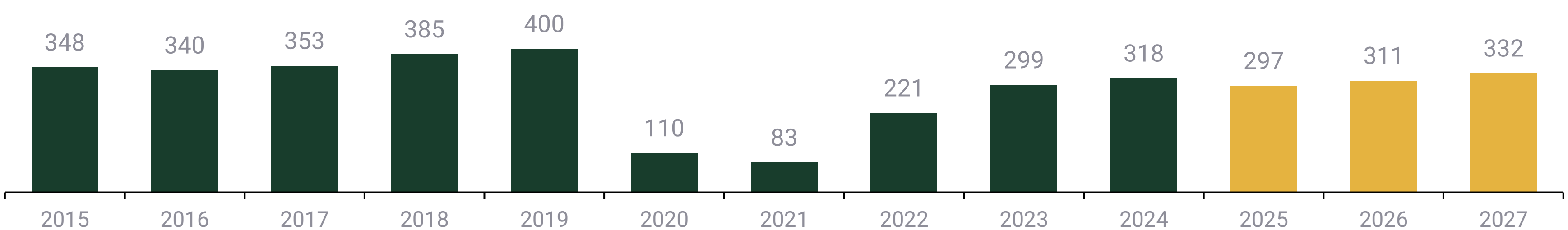
2.6%
Visits

CAGR is Compound Annual Growth Rate.

Spending ($M)



Visits (K)



Historic Forecast

Source: Tourism Economics, Feb 2026

Macro Context

Top 10 spending markets | GDP % change and currency exchange rate (2026)

United Kingdom

1.3% GDP % Change

1.35 GBP/USD

China

4.2% GDP % Change

6.84 CNY/USD

Germany

0.9% GDP % Change

1.18 EUR/USD

Canada

1.5% GDP % Change

1.37 CAD/USD

Brazil

1.9% GDP % Change

5.15 BRL/USD

India

6.2% GDP % Change

90.92 INR/USD

Japan

0.6% GDP % Change

156.13 JPY/USD

Italy

0.8% GDP % Change

1.18 EUR/USD

France

0.9% GDP % Change

1.18 EUR/USD

South Korea

1.8% GDP % Change

1,433.32 KRW/USD

Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

International Markets

67%
Familiarity

75%
Appeal

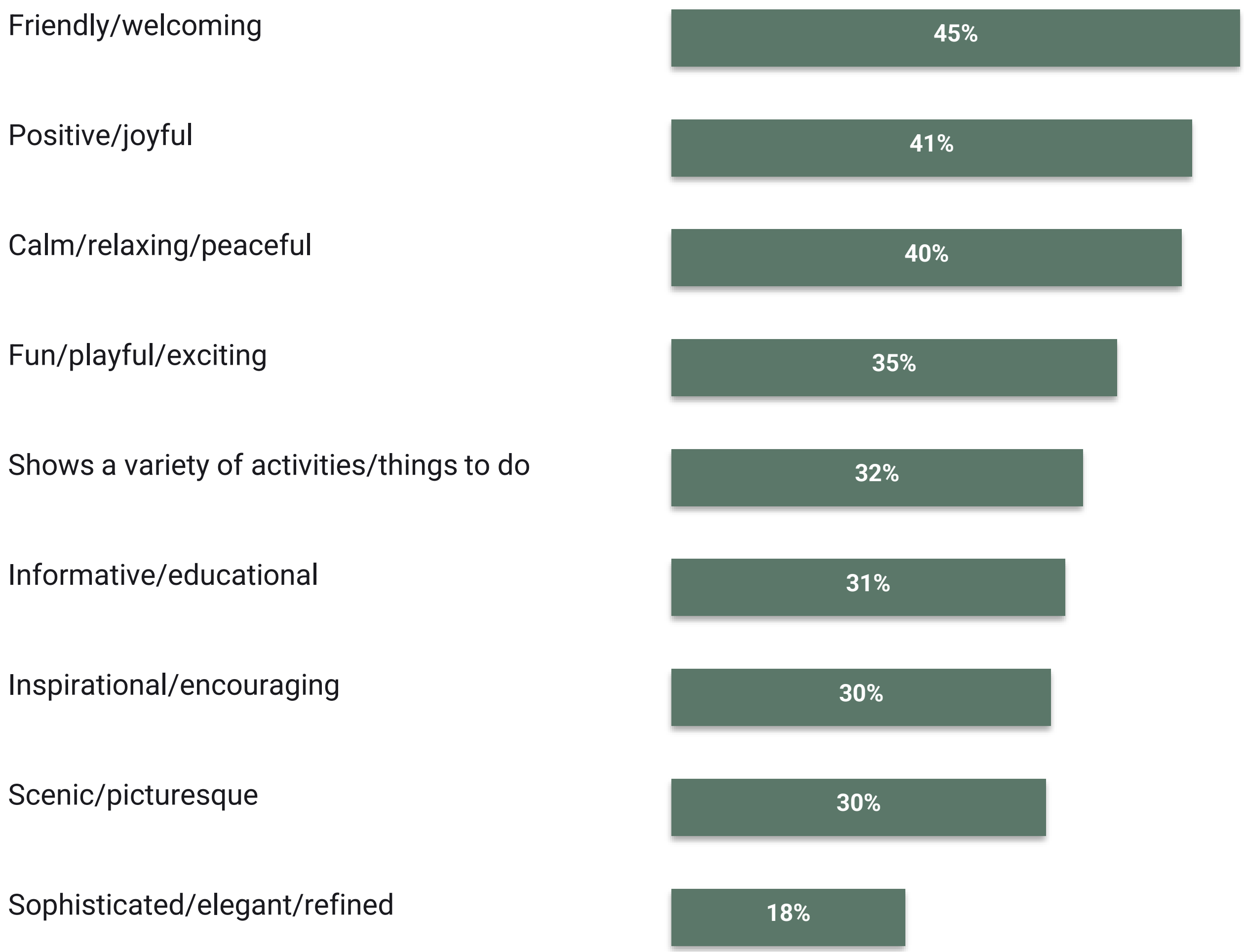
29%
Promotional Buzz

41%
Likely to Visit (5yr)

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

International Markets



Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

Total international

U.S. Trip Planning

36%	14 wks	12 wks
Likely to Visit US (2yr)	Planning Window	Booking Window
Intl Markets: 36%	Intl Markets: 14 wks	Intl Markets: 12 wks

U.S. Trip Profile

12.3	4.4	2.6
Avg Days in the U.S.	Avg Destinations in the U.S.	Avg Number of People Traveling with
Intl Markets: 12.3	Intl Markets: 4.4	Intl Markets: 2.6

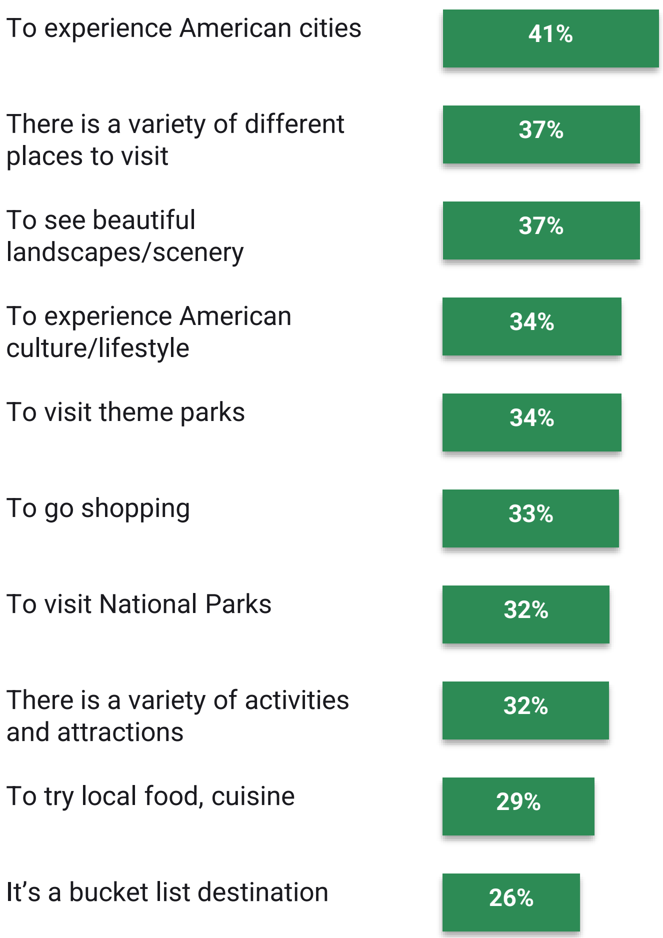
Average Budget | 2-Week U.S. Trip

$1,568	$1,001	$826	$881	$772	$5,049
Hotels	Shopping	Dining	Sightseeing	Transport	Total
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

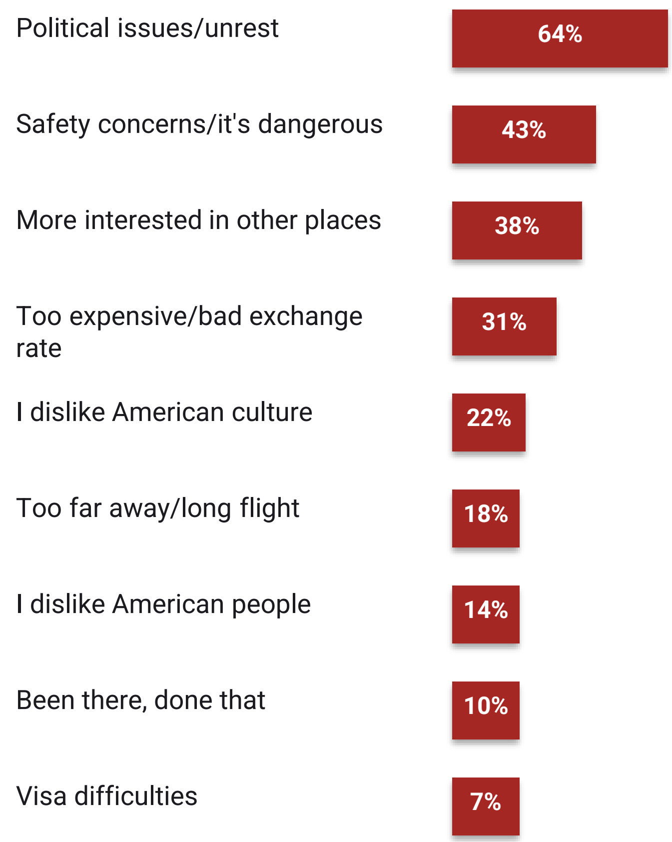
Enablers & Barriers to Visiting

International Markets

Enablers



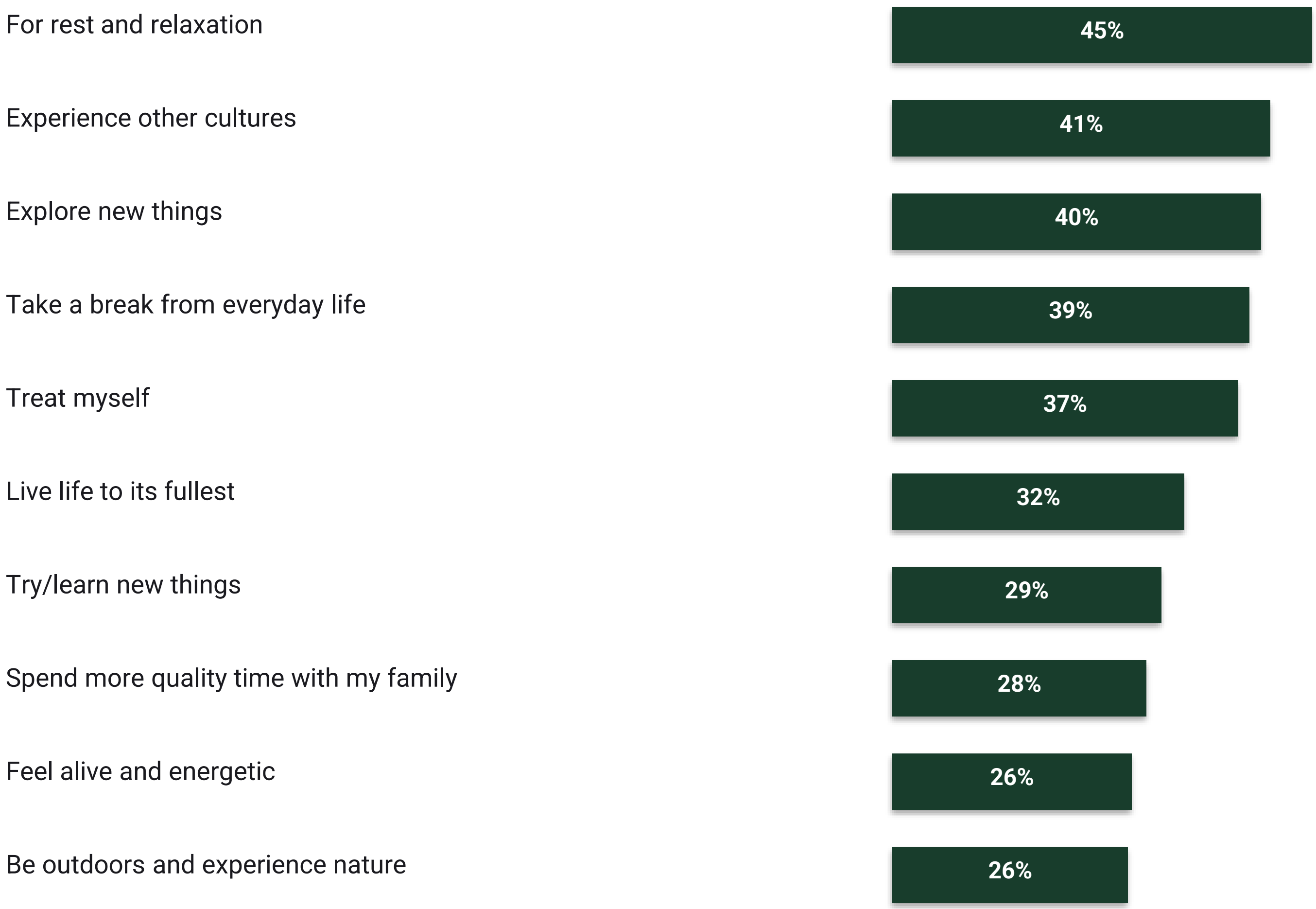
Barriers



Source: Future Partners, Mar 2026

Travel Motivations

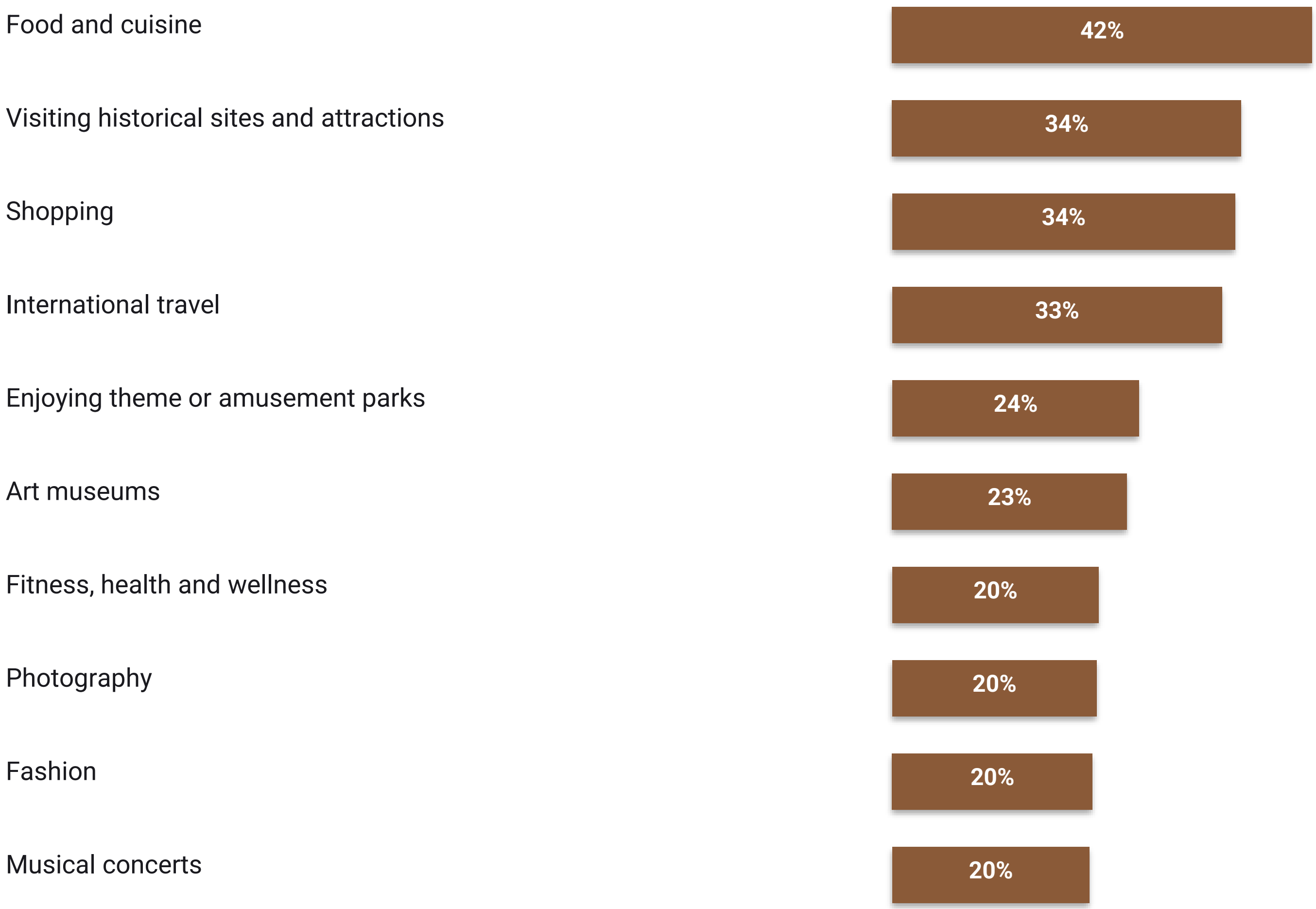
International Markets



Source: Future Partners, Mar 2026

Hobbies & Passions

International Markets



Source: Future Partners, Mar 2026

Travel Trends & Outlook

International Markets

Global wars/strife will impact the destinations I visit in 2025.

54%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it.

53%

With higher temperatures each year, I will try to seek out cooler places.

44%

I'll be more proactive in reducing the impact of my travel on the environment.

43%

Climate change will have a significant impact on my leisure travel in the next five (5) years.

42%

I am likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination).

42%

Luxury travel experiences are an important part of my leisure trips.

39%

I anticipate that backlash against tourism will increase in my community in the next year.

34%

I often bring work with me to do when I am on holiday.

27%

Source: Future Partners, Mar 2026

Top Five Markets by Spending

International Visitor Economy & Profiles by Country

UNITED KINGDOM

Source Market Analysis | Alabama

#1 by Spending | #2 by Visits

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TravelSouth USA
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United Kingdom | Key Findings

1. **2026 Alabama projected spending:** $74.4M (+3.9% YOY). Projected visitors: 31.8K (+5.3% YOY). Ranks #1 by spending and #2 by visits among Alabama source markets.
2. **Macro Context:** United Kingdom 2026 GDP growth projected at 1.3%%. Exchange rate: 1.35 GBP/USD.
3. **CAGR Comparison:** 2023-2027 projected spending CAGR (6.3%) exceeds 2015-2019 (3.3%).
4. **Visitor Perceptions:** 74% familiarity with the American South, 78% appeal, 41% likely to visit in the next 5 years.
5. **U.S. Trip Profile:** Average spending $5,448 for a 2-week trip. Average length of stay: 11.2 days. Average destinations: 3.9.
6. **Top Motivation:** For rest and relaxation (51%)
7. **Top Enabler:** To experience American cities (45%)
8. **Preferred Tone:** Friendly/welcoming (54%)
9. **Top Barrier:** Political issues/unrest (72%)

Source: Tourism Economics, Feb 2026; Future Partners, Mar 2026

United Kingdom

$74.4M
2026 Alabama Spending
+3.9% YOY vs. 2025

31.8K
2026 Alabama Visitors
+5.3% YOY vs. 2025

$11.9B
2026 USA Spending
+3.3% YOY vs. 2025

5.8M
2026 USA Visitors
+3.5% YOY vs. 2025

$71.6M
2025 Alabama Spending
+12.8% YOY vs. 2024

30.2K
2025 Alabama Visitors
+0.3% YOY vs. 2024

$11.5B
2025 USA Spending
+9.4% YOY vs. 2024

5.6M
2025 USA Visitors
-0.1% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015–2019 CAGR

3.3% Spending

1.7% Visits

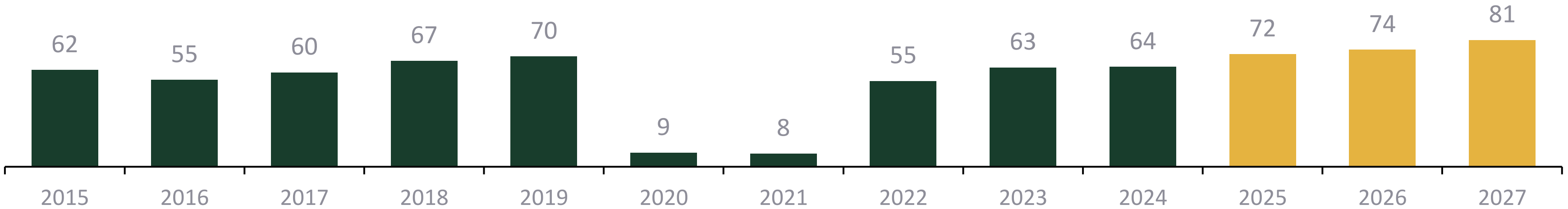
2023–2027 PROJECTED CAGR

6.3% Spending

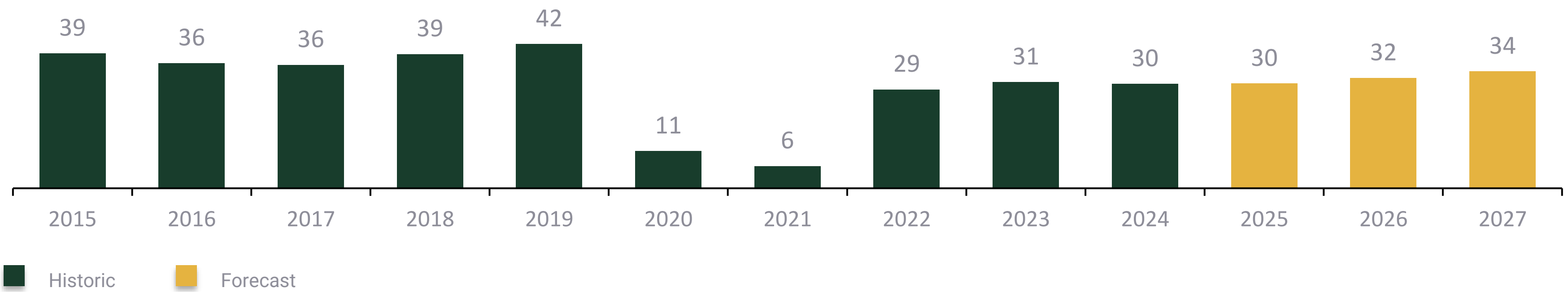
2.4% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

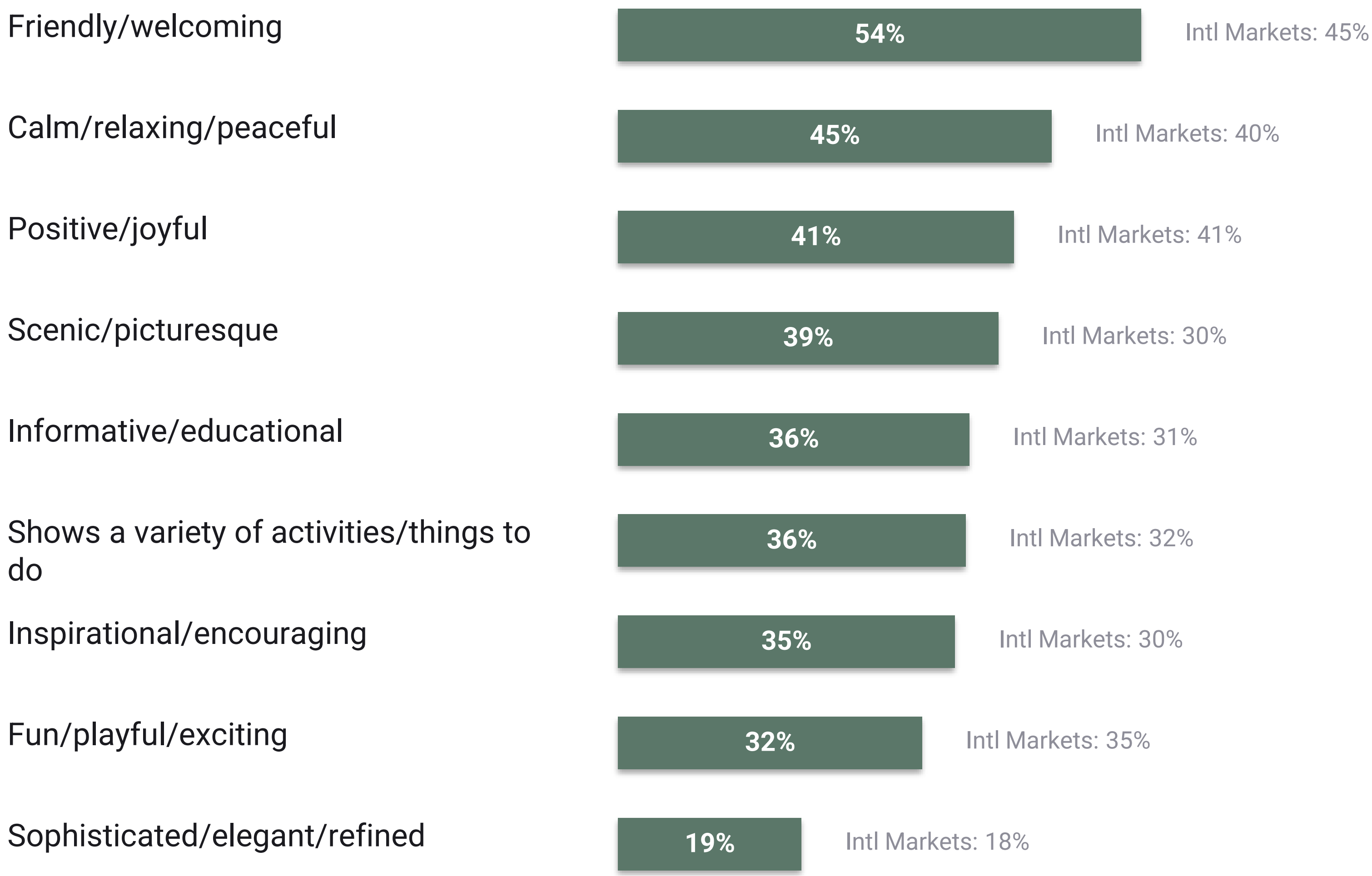
United Kingdom

74% Familiarity Intl Markets: 67%	**78%** Appeal Intl Markets: 75%
26% Promotional Buzz Intl Markets: 29%	**41%** Likely to Visit (5yr) Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

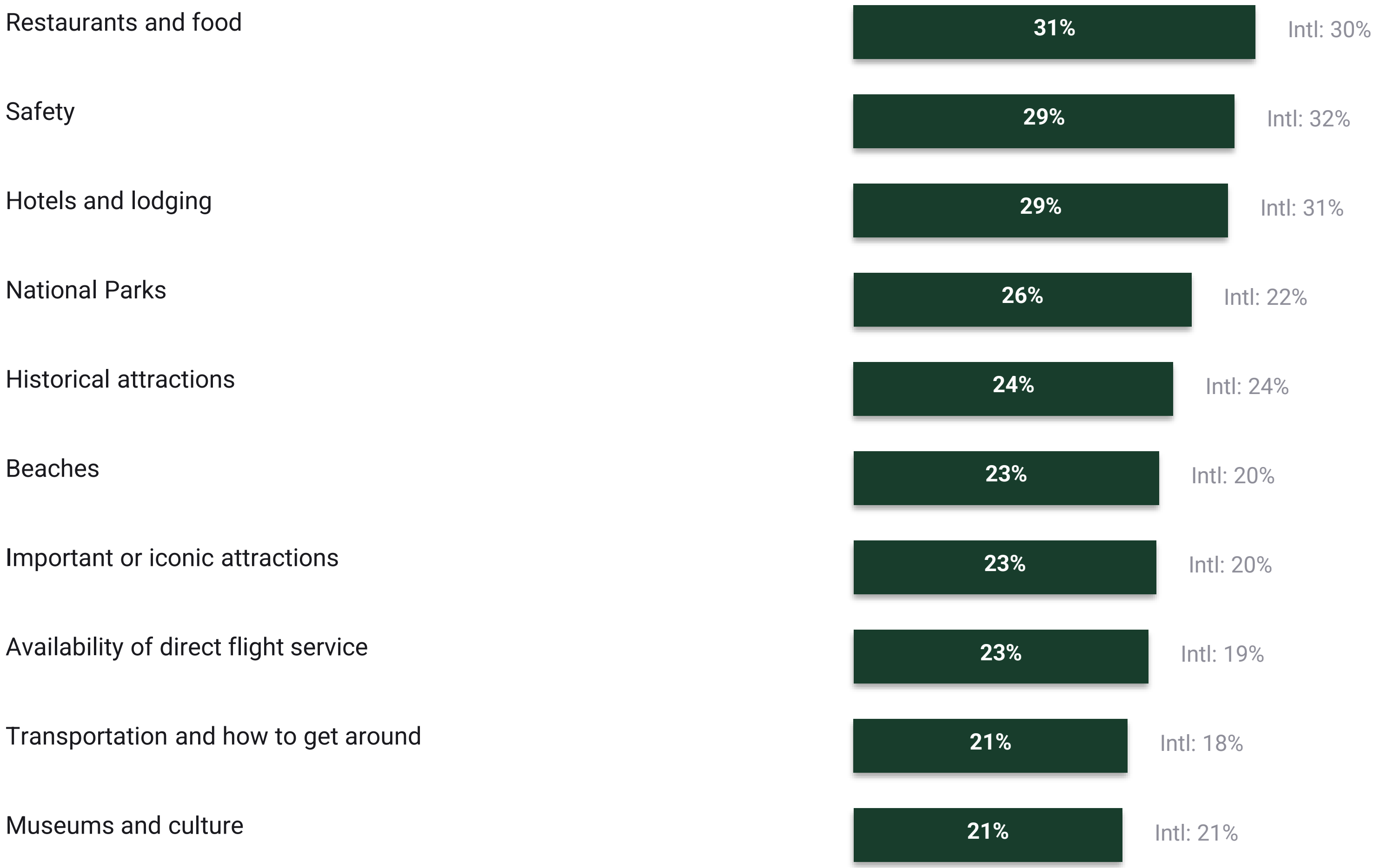
United Kingdom



Source: Future Partners, Mar 2026

Top Information Sources

United Kingdom



Source: Future Partners, Mar 2026

Planning Resources

United Kingdom

Resource	United Kingdom	Intl
Online search engines	48%	Intl: 42%
Online travel agencies	41%	Intl: 35%
Online travel reviews, blogs, itineraries or opinions from other travelers	34%	Intl: 30%
Opinions of friends, colleagues, or relatives	33%	Intl: 34%
Travel agent – offline	29%	Intl: 27%
Tour agent or tour operator websites	27%	Intl: 29%
Official visitor bureau’s website	26%	Intl: 26%
Social media	25%	Intl: 29%
Travel or lifestyle magazine – printed or online	20%	Intl: 17%
Artificial Intelligence tool	18%	Intl: 23%

Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

United Kingdom

U.S. Trip Planning

40%
Likely to Visit US (2yr)
Intl Markets: 36%

16 wks
Planning Window
Intl Markets: 14 wks

14 wks
Booking Window
Intl Markets: 12 wks

U.S. Trip Profile

11.2
Avg Days in the U.S.
Intl Markets: 12.3

3.9
Avg Destinations in the U.S.
Intl Markets: 4.4

2.2
Avg Number of People Traveling with
Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

$1,968
Hotels
Intl: $1,568

$957
Shopping
Intl: $1,001

$931
Dining
Intl: $826

$838
Sightseeing
Intl: $881

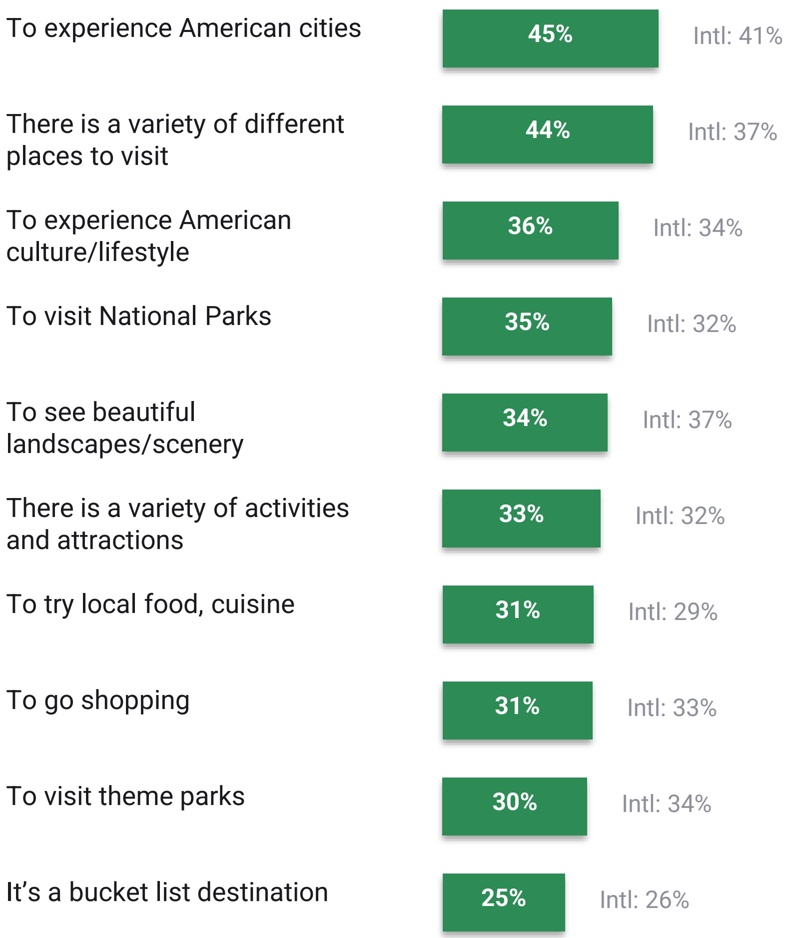
$753
Transport
Intl: $772

$5,448
Total
Intl: $5,049

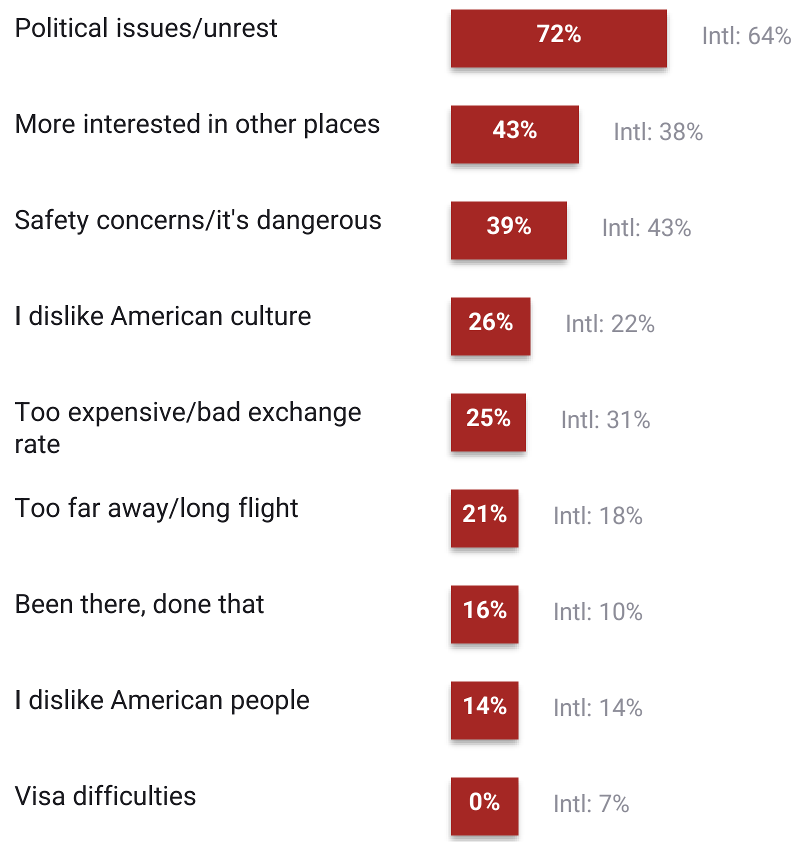
Enablers & Barriers to Visiting

United Kingdom

Enablers



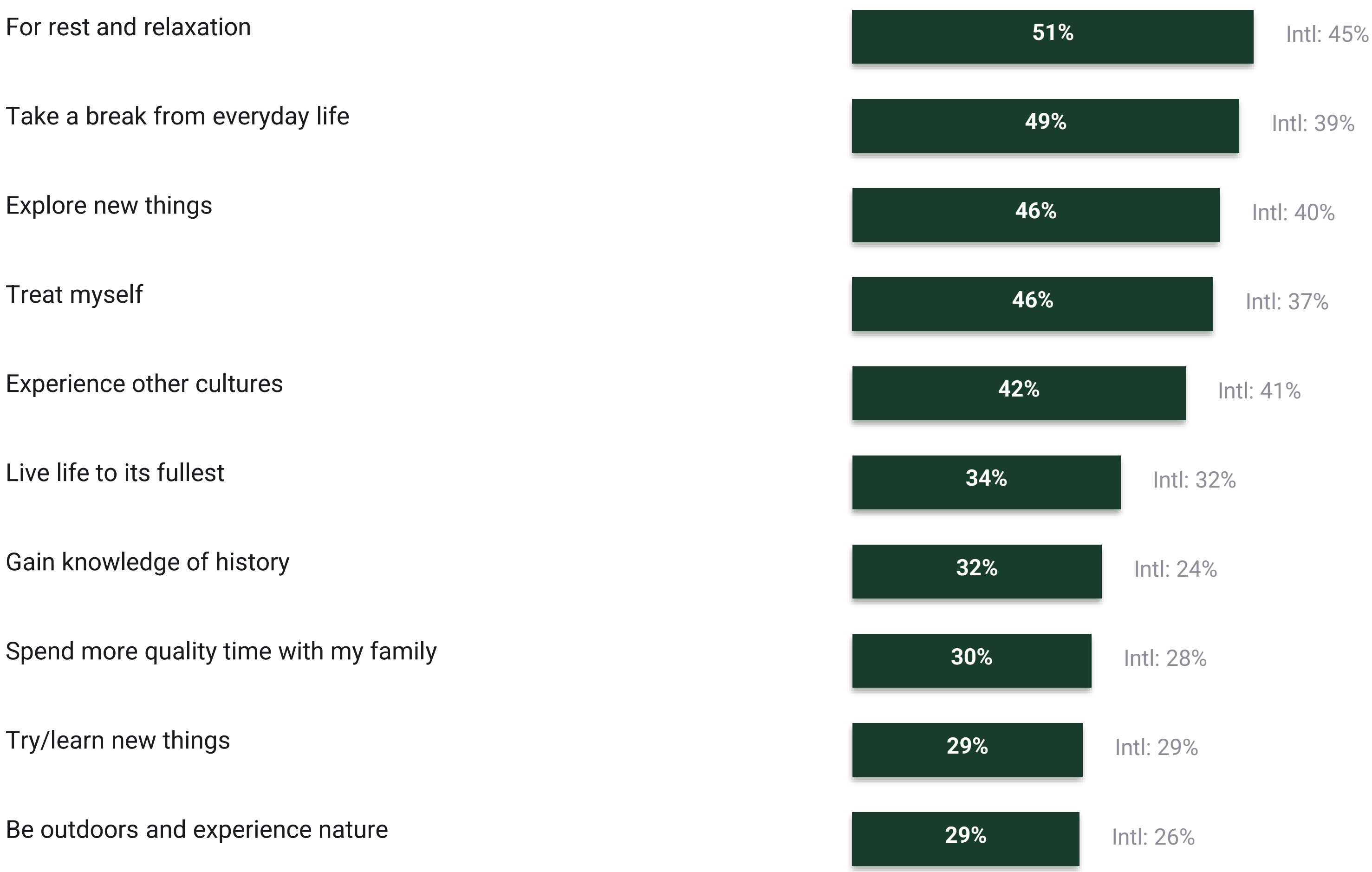
Barriers



Source: Future Partners, Mar 2026

Travel Motivations

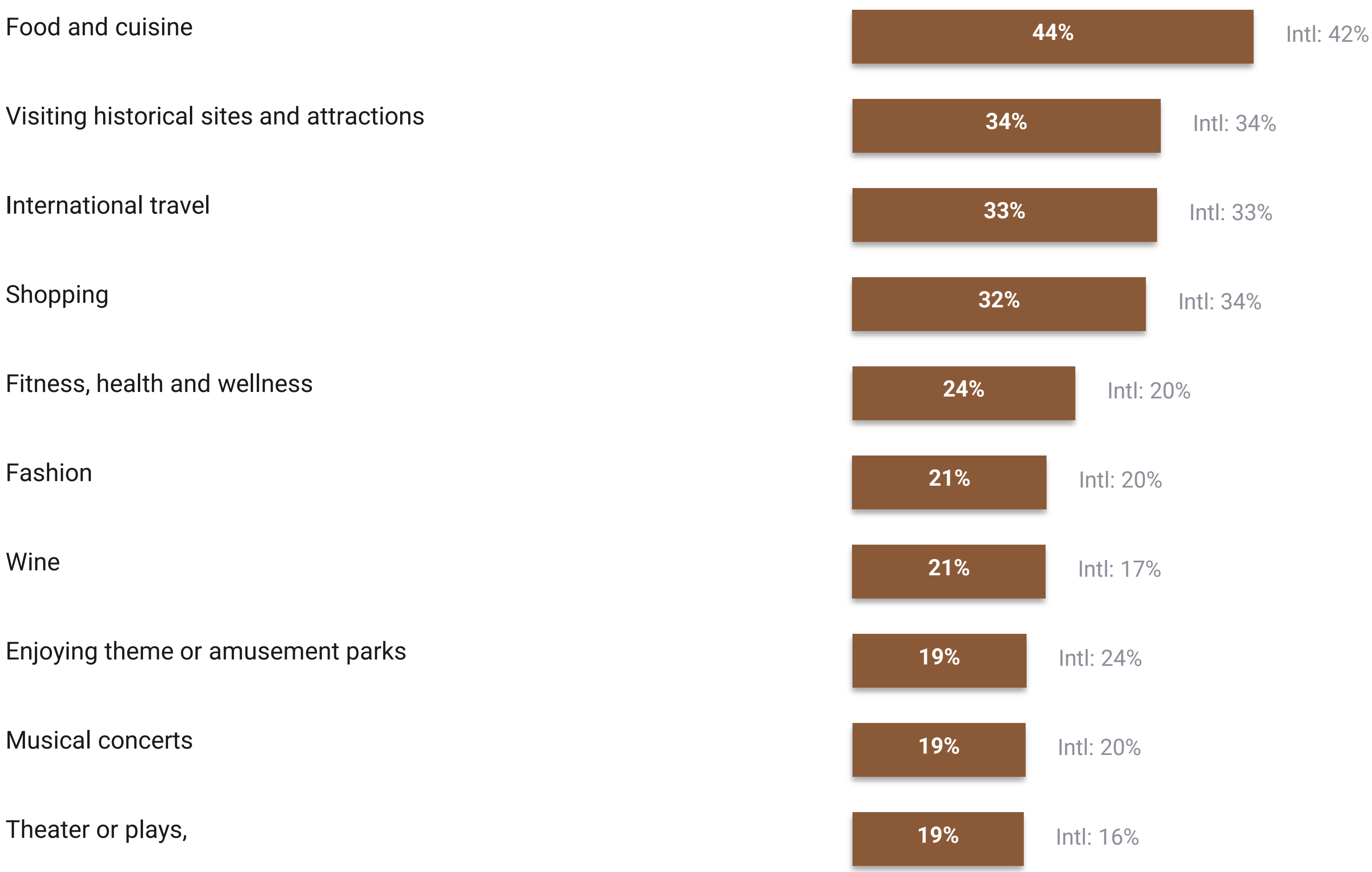
United Kingdom



Source: Future Partners, Mar 2026

Hobbies & Passions

United Kingdom



Source: Future Partners, Mar 2026

Travel Trends & Outlook

United Kingdom

If a U.S. destination has a problem with over-tourism, I am less likely to visit it.

55%

Intl: 53%

Global wars/strife will impact the destinations I visit in 2025.

54%

Intl: 54%

Luxury travel experiences are an important part of my leisure trips.

46%

Intl: 39%

Climate change will have a significant impact on my leisure travel in the next five (5) years.

42%

Intl: 42%

With higher temperatures each year, I will try to seek out cooler places.

41%

Intl: 44%

I am likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination).

41%

Intl: 42%

I'll be more proactive in reducing the impact of my travel on the environment.

41%

Intl: 43%

I anticipate that backlash against tourism will increase in my community in the next year.

30%

Intl: 34%

I often bring work with me to do when I am on holiday.

25%

Intl: 27%

United Kingdom | Intl Markets

CHINA

Source Market Analysis | Alabama

#2 by Spending | #6 by Visits

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www.Alabama.Travel

Travel South USA
All Y'all Are Welcome

China | Key Findings

1. **2026 Alabama projected spending:** $39.9M (+6.4% YOY). Projected visitors: 12.8K (+5.8% YOY). Ranks #2 by spending and #6 by visits among Alabama source markets.
2. **Macro Context:** China 2026 GDP growth projected at 4.2%%. Exchange rate: 6.84 CNY/USD.
3. **CAGR Comparison:** 2023-2027 projected spending CAGR (25.8%) exceeds 2015-2019 (7.7%).
4. **Visitor Perceptions:** 77% familiarity with the American South, 83% appeal, 54% likely to visit in the next 5 years.
5. **U.S. Trip Profile:** Average spending $8,672 for a 2-week trip. Average length of stay: 10.2 days. Average destinations: 3.0.
6. **Top Motivation:** For rest and relaxation (37%)
7. **Top Enabler:** To see beautiful landscapes/scenery (36%)
8. **Preferred Tone:** Fun/playful/exciting (44%)
9. **Top Barrier:** Political issues/unrest (61%)

Source: Tourism Economics, Feb 2026; Future Partners, Mar 2026

China

$39.9M
2026 Alabama Spending
+6.4% YOY vs. 2025

12.8K
2026 Alabama Visitors
+5.8% YOY vs. 2025

$8.8B
2026 USA Spending
+4.8% YOY vs. 2025

2.8M
2026 USA Visitors
+4.8% YOY vs. 2025

$37.5M
2025 Alabama Spending
+3.6% YOY vs. 2024

12.1K
2025 Alabama Visitors
-4% YOY vs. 2024

$8.4B
2025 USA Spending
+0.2% YOY vs. 2024

2.6M
2025 USA Visitors
-3.2% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015–2019 CAGR

7.7% Spending

9.5% Visits

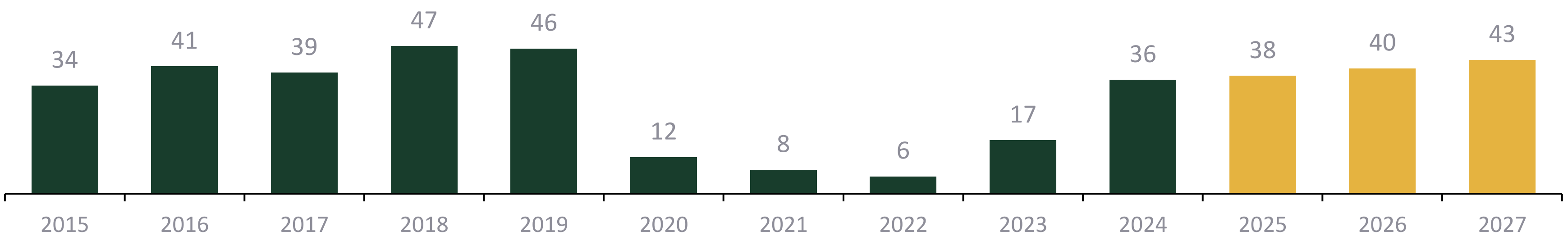
2023–2027 PROJECTED CAGR

25.8% Spending

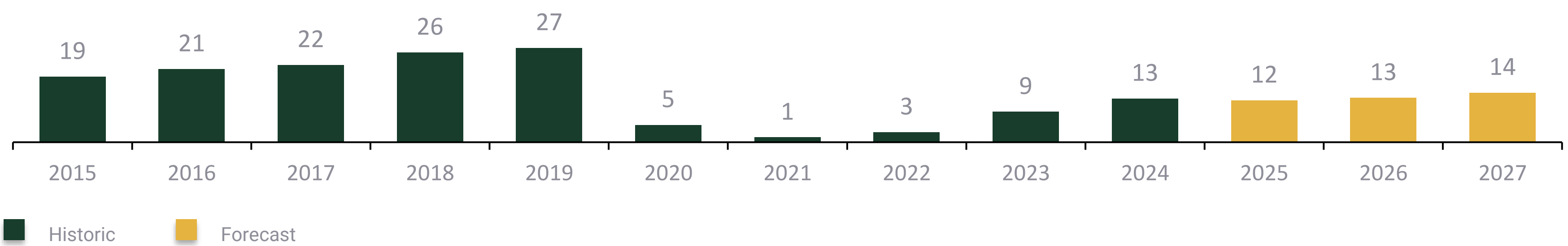
12.9% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

China

77%

Familiarity

Intl Markets: 67%

83%

Appeal

Intl Markets: 75%

47%

Promotional Buzz

Intl Markets: 29%

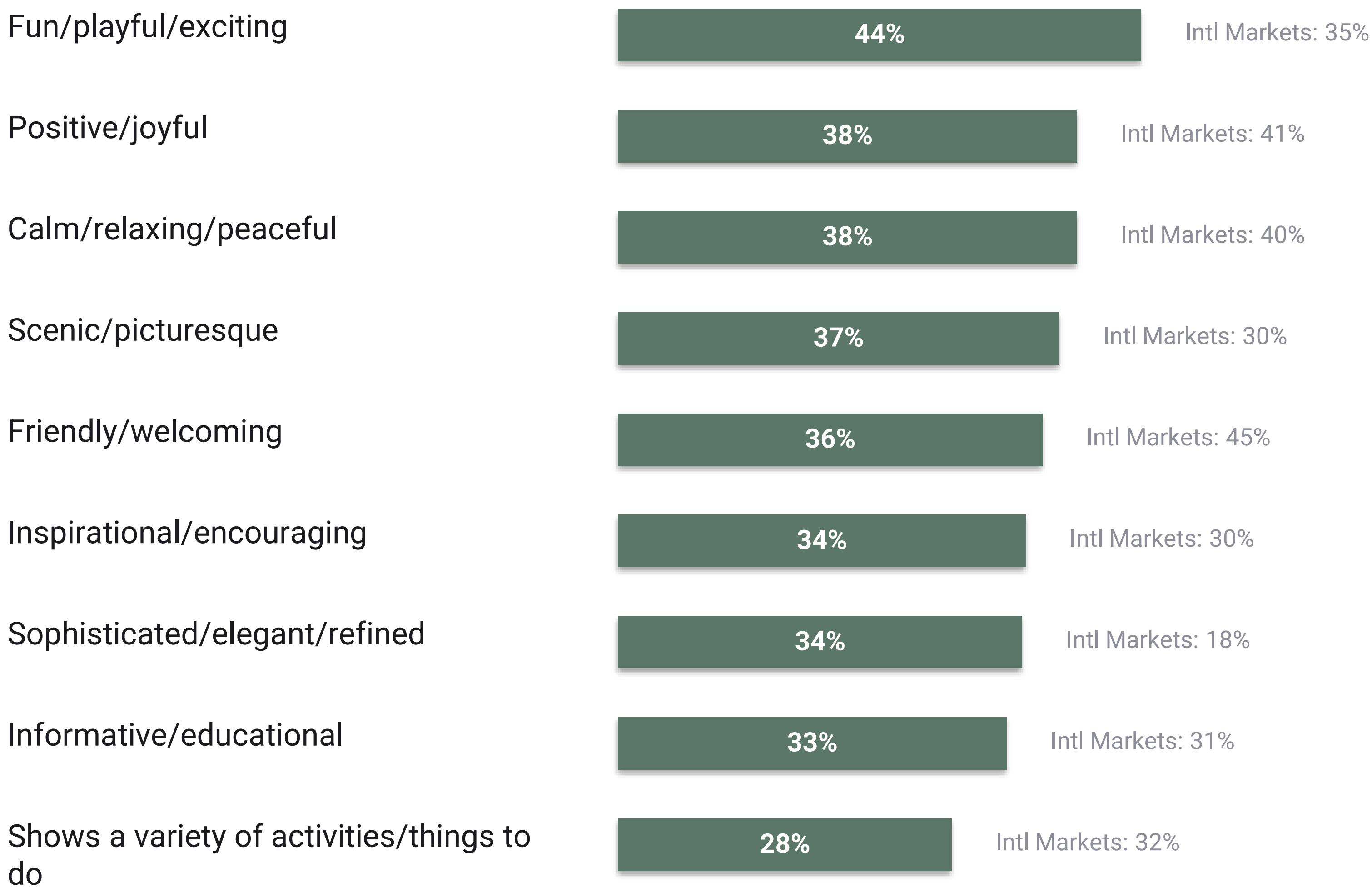
54%

Likely to Visit (5yr)

Intl Markets: 41%

Desired Travel Promotion Tone

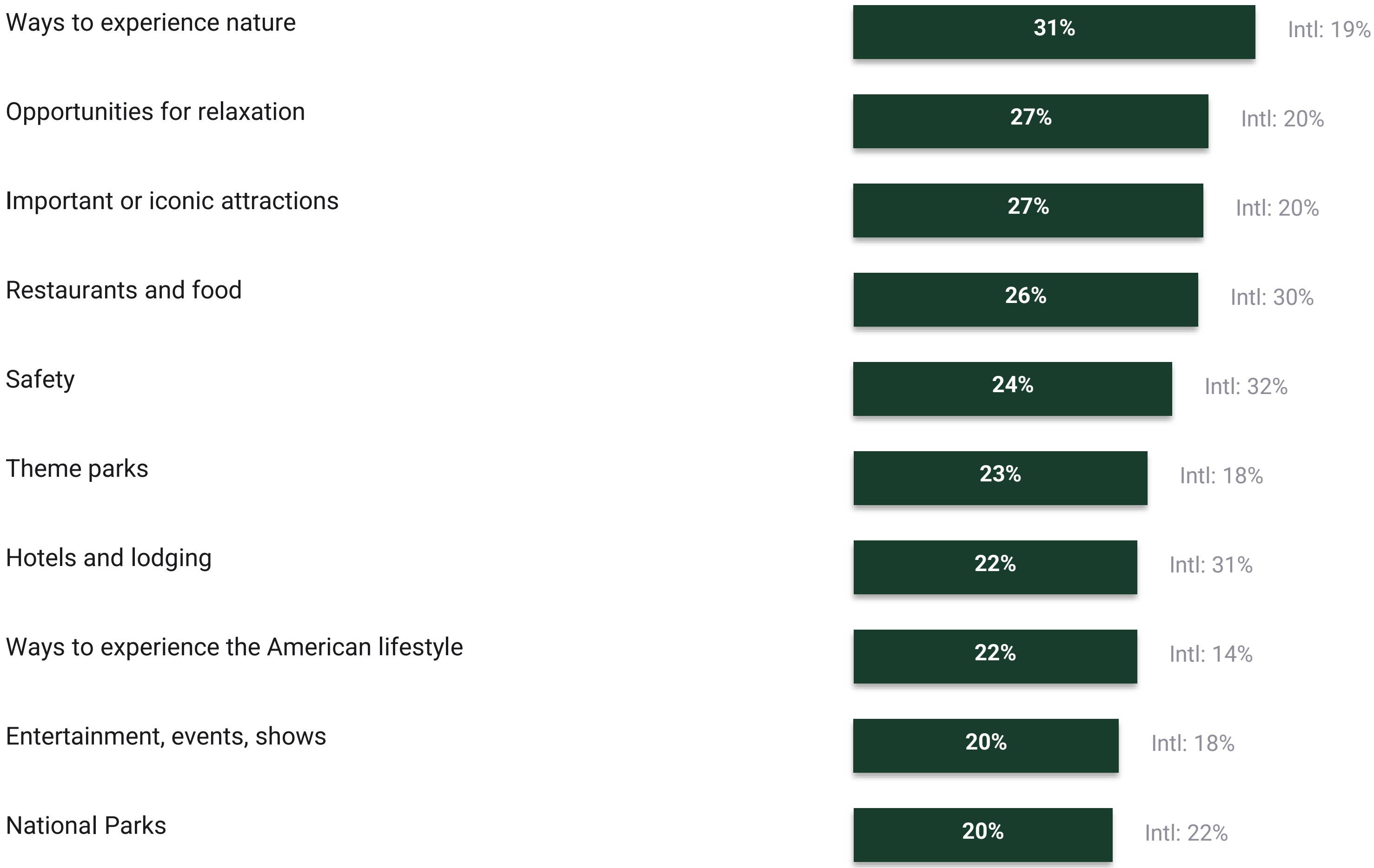
China



Source: Future Partners, Mar 2026

Top Information Sources

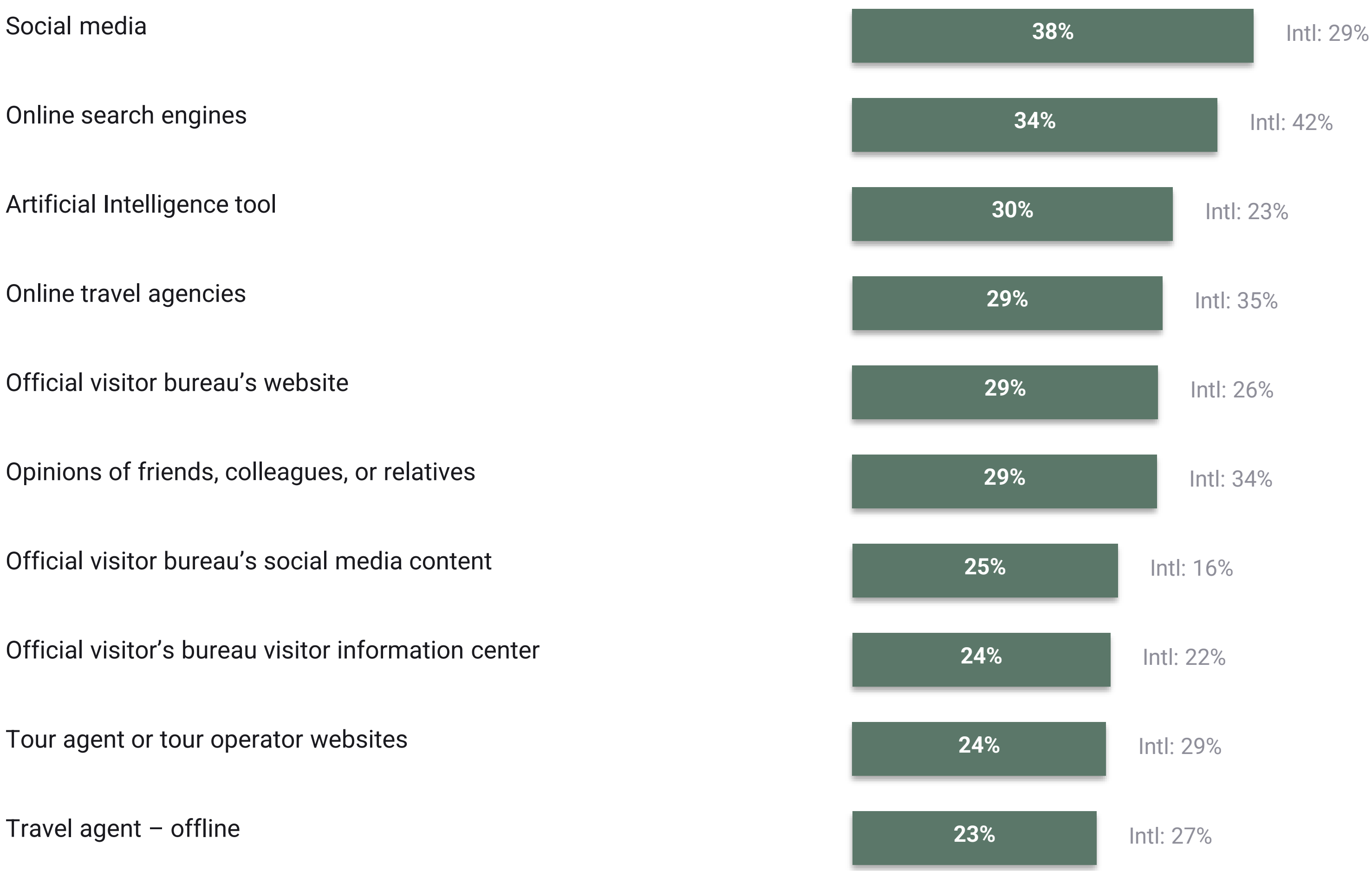
China



Source: Future Partners, Mar 2026

Planning Resources

China



Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

China

U.S. Trip Planning

51%	10 wks	7 wks
Likely to Visit US (2yr)	Planning Window	Booking Window
Intl Markets: 36%	Intl Markets: 14 wks	Intl Markets: 12 wks

U.S. Trip Profile

10.2	3.0	2.6
Avg Days in the U.S.	Avg Destinations in the U.S.	Avg Number of People Traveling with
Intl Markets: 12.3	Intl Markets: 4.4	Intl Markets: 2.6

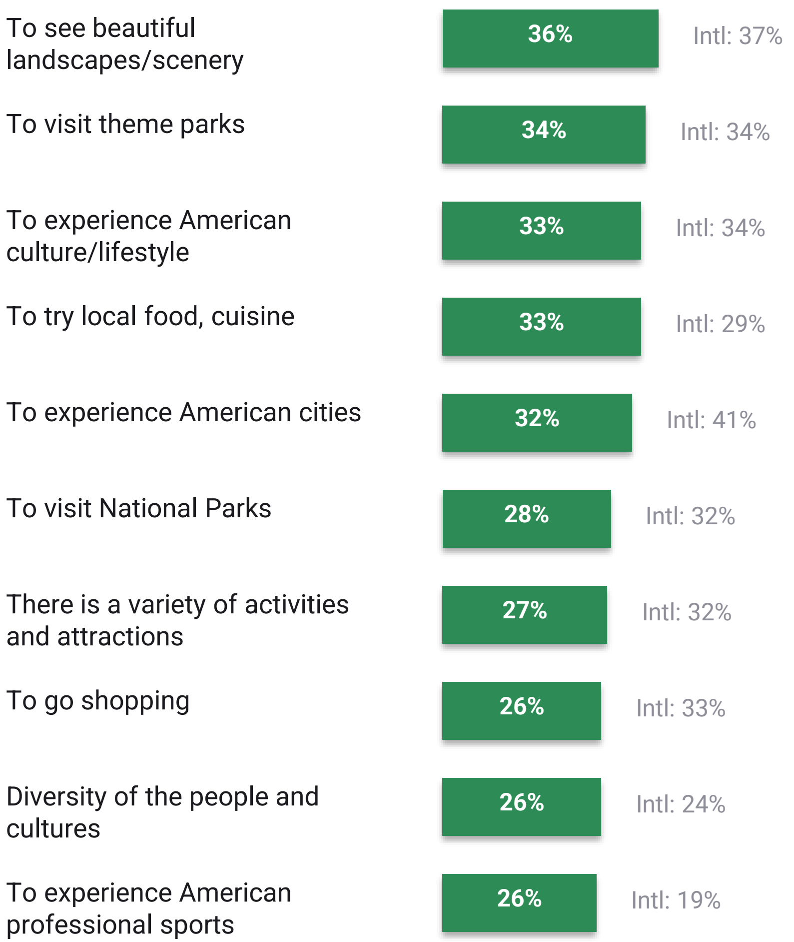
Average Budget | 2-Week U.S. Trip

$1,714	$2,743	$1,382	$1,734	$1,098	$8,672
Hotels	Shopping	Dining	Sightseeing	Transport	Total
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

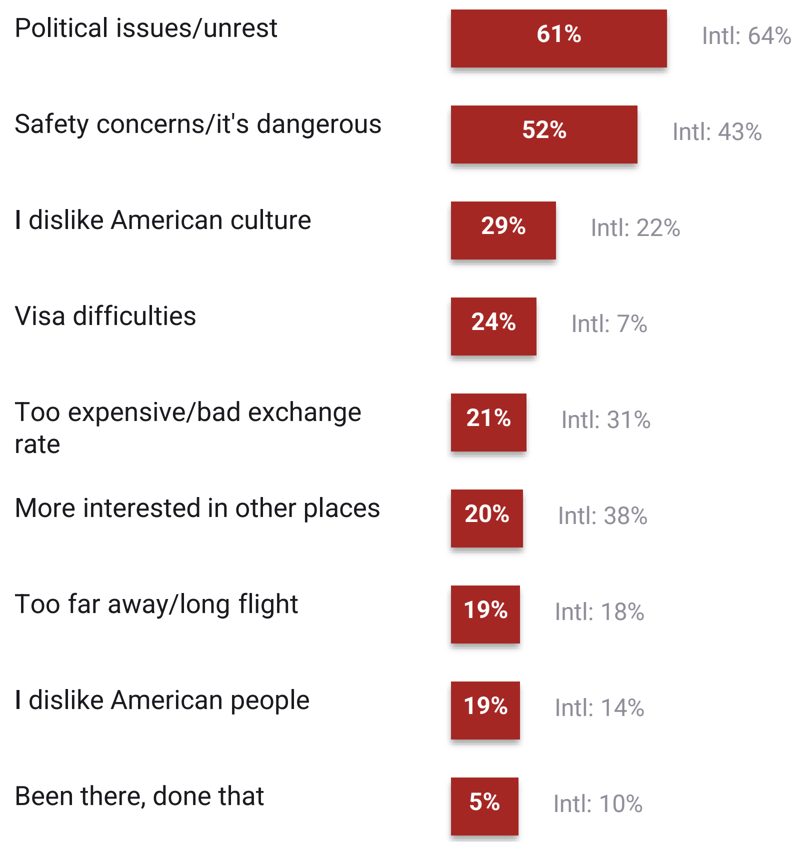
Enablers & Barriers to Visiting

China

Enablers



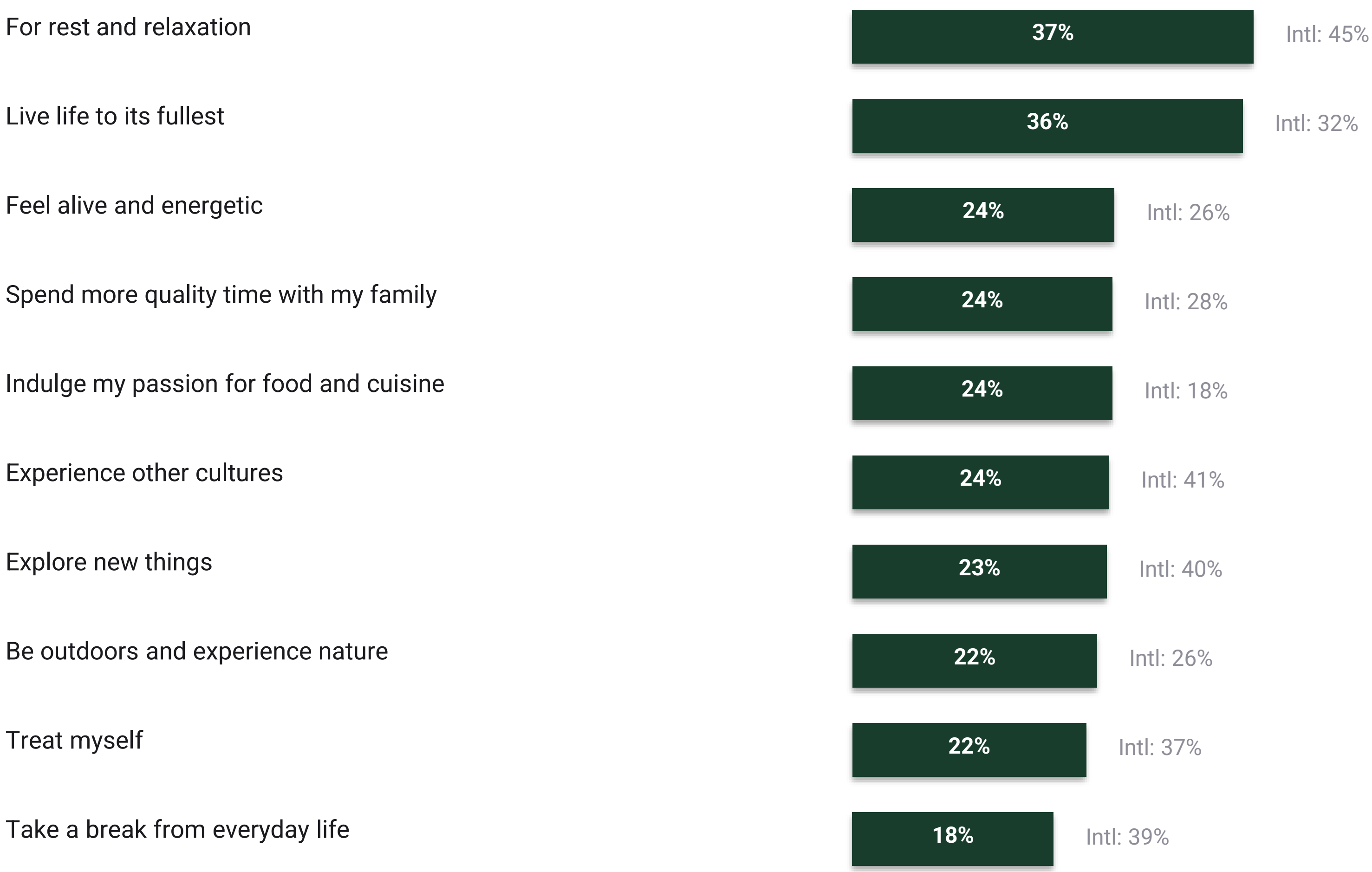
Barriers



Source: Future Partners, Mar 2026

Travel Motivations

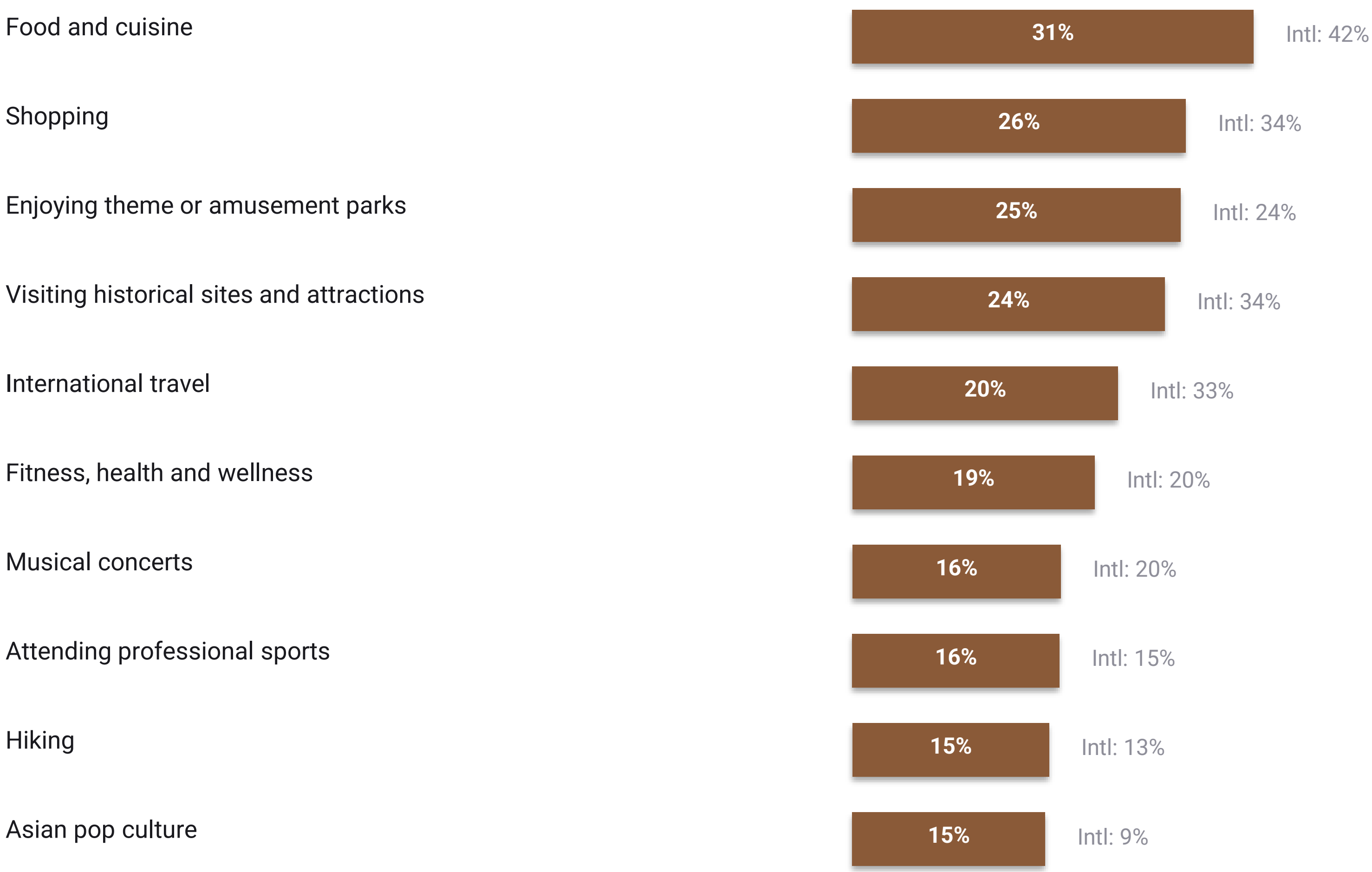
China



Source: Future Partners, Mar 2026

Hobbies & Passions

China



Source: Future Partners, Mar 2026

Travel Trends & Outlook

China

With higher temperatures each year, I will try to seek out cooler places.

66%

Intl: 44%

Luxury travel experiences are an important part of my leisure trips.

61%

Intl: 39%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it.

61%

Intl: 53%

I am likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination).

60%

Intl: 42%

Global wars/strife will impact the destinations I visit in 2025.

60%

Intl: 54%

I'll be more proactive in reducing the impact of my travel on the environment.

59%

Intl: 43%

Climate change will have a significant impact on my leisure travel in the next five (5) years.

54%

Intl: 42%

I anticipate that backlash against tourism will increase in my community in the next year.

47%

Intl: 34%

I often bring work with me to do when I am on holiday.

43%

Intl: 27%

China Intl Markets

GERMANY

Source Market Analysis | Alabama

#3 by Spending | #5 by Visits

Sweet Home Alabama
www.Alabama.Travel

Travel South USA
All Y'all Are Welcome

Germany | Key Findings

1. **2026 Alabama projected spending:** $39.7M (+10.3% YOY). Projected visitors: 15.9K (+6% YOY). Ranks #3 by spending and #5 by visits among Alabama source markets.
2. **Macro Context:** Germany 2026 GDP growth projected at 0.9%%. Exchange rate: 1.18 EUR/USD.
3. **CAGR Comparison:** 2023-2027 projected spending CAGR (7.7%) exceeds 2015-2019 (5%).
4. **Visitor Perceptions:** 67% familiarity with the American South, 72% appeal, 36% likely to visit in the next 5 years.
5. **U.S. Trip Profile:** Average spending $4,127 for a 2-week trip. Average length of stay: 12.5 days. Average destinations: 4.5.
6. **Top Motivation:** For rest and relaxation (43%)
7. **Top Enabler:** To see beautiful landscapes/scenery (37%)
8. **Preferred Tone:** Friendly/welcoming (48%)
9. **Top Barrier:** Political issues/unrest (66%)

Source: Tourism Economics, Feb 2026; Future Partners, Mar 2026

Germany

$39.7M
2026 Alabama Spending
+10.3% YOY vs. 2025

15.9K
2026 Alabama Visitors
+6% YOY vs. 2025

$6.3B
2026 USA Spending
+7.7% YOY vs. 2025

2.8M
2026 USA Visitors
+3.8% YOY vs. 2025

$36M
2025 Alabama Spending
+5.3% YOY vs. 2024

15K
2025 Alabama Visitors
-11.2% YOY vs. 2024

$5.8B
2025 USA Spending
+1.3% YOY vs. 2024

2.7M
2025 USA Visitors
-11.4% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015-2019 CAGR

5%
Spending

4.1%
Visits

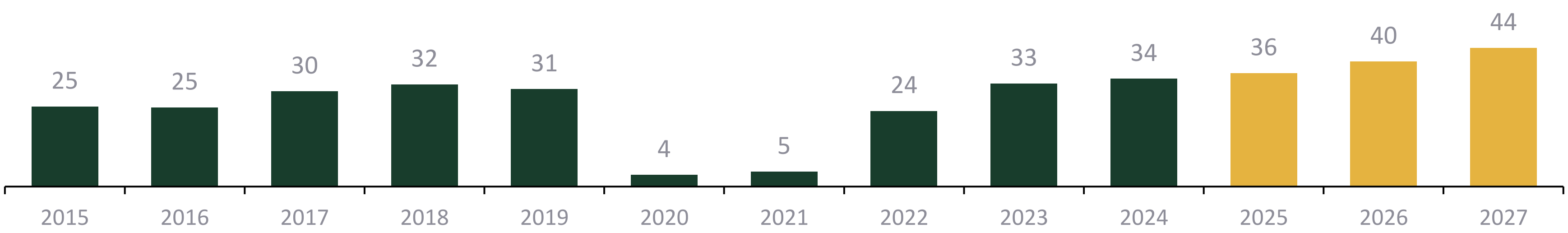
2023-2027 PROJECTED CAGR

7.7%
Spending

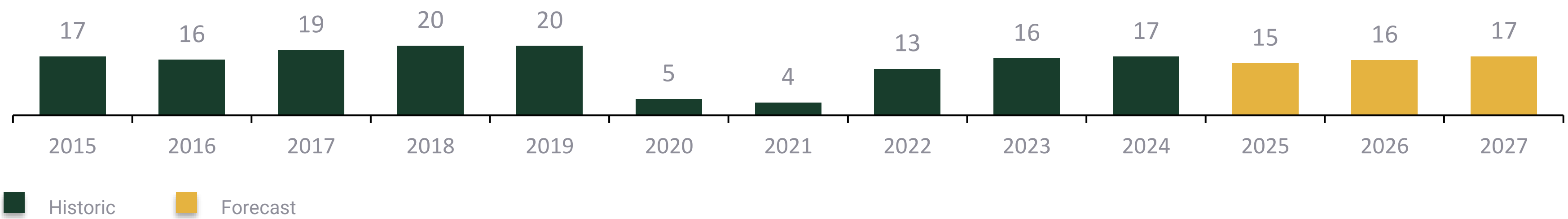
0.9%
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

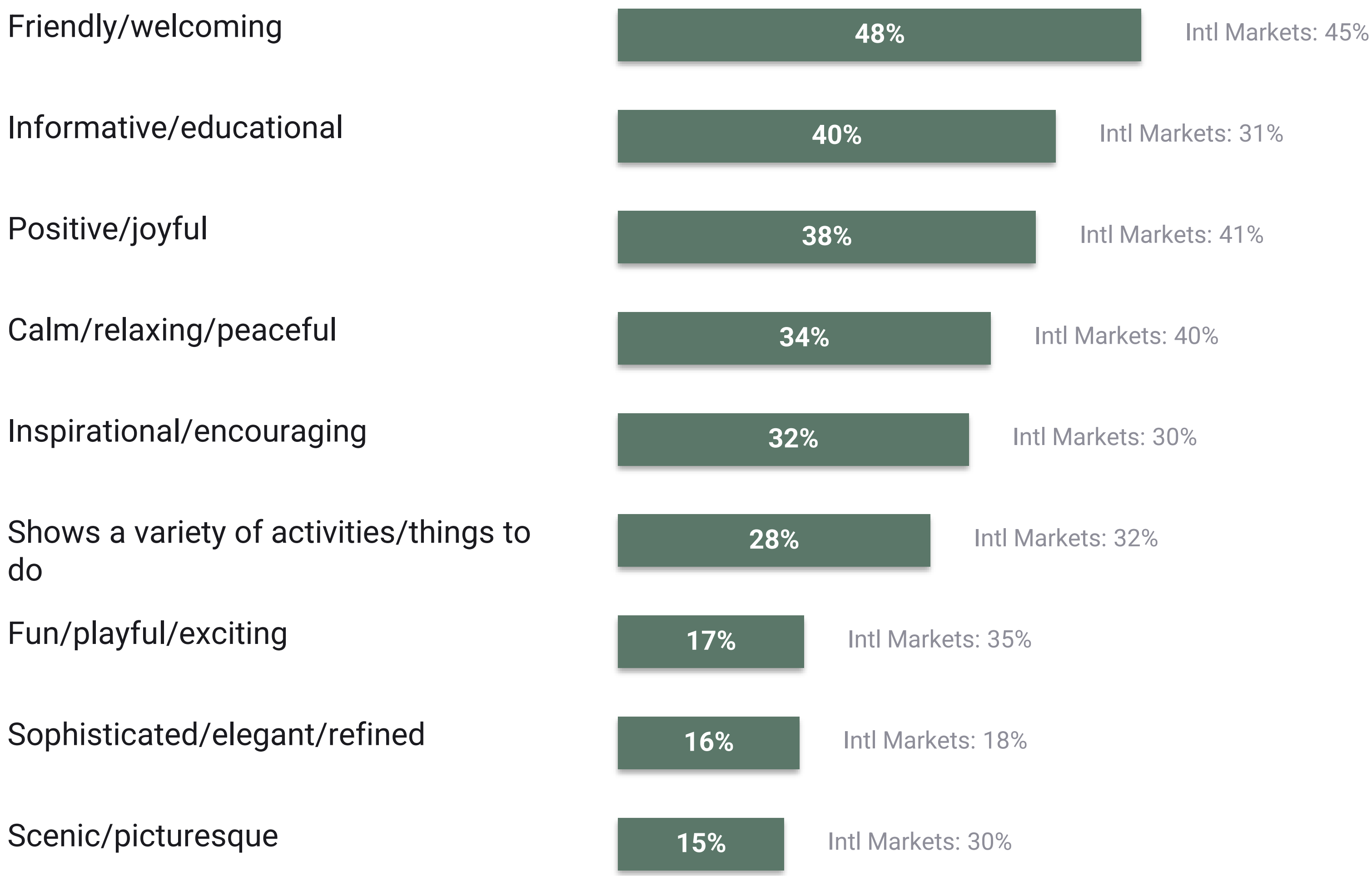
Germany

67% Familiarity — Intl Markets: 67%	**72%** Appeal — Intl Markets: 75%
28% Promotional Buzz — Intl Markets: 29%	**36%** Likely to Visit (5yr) — Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

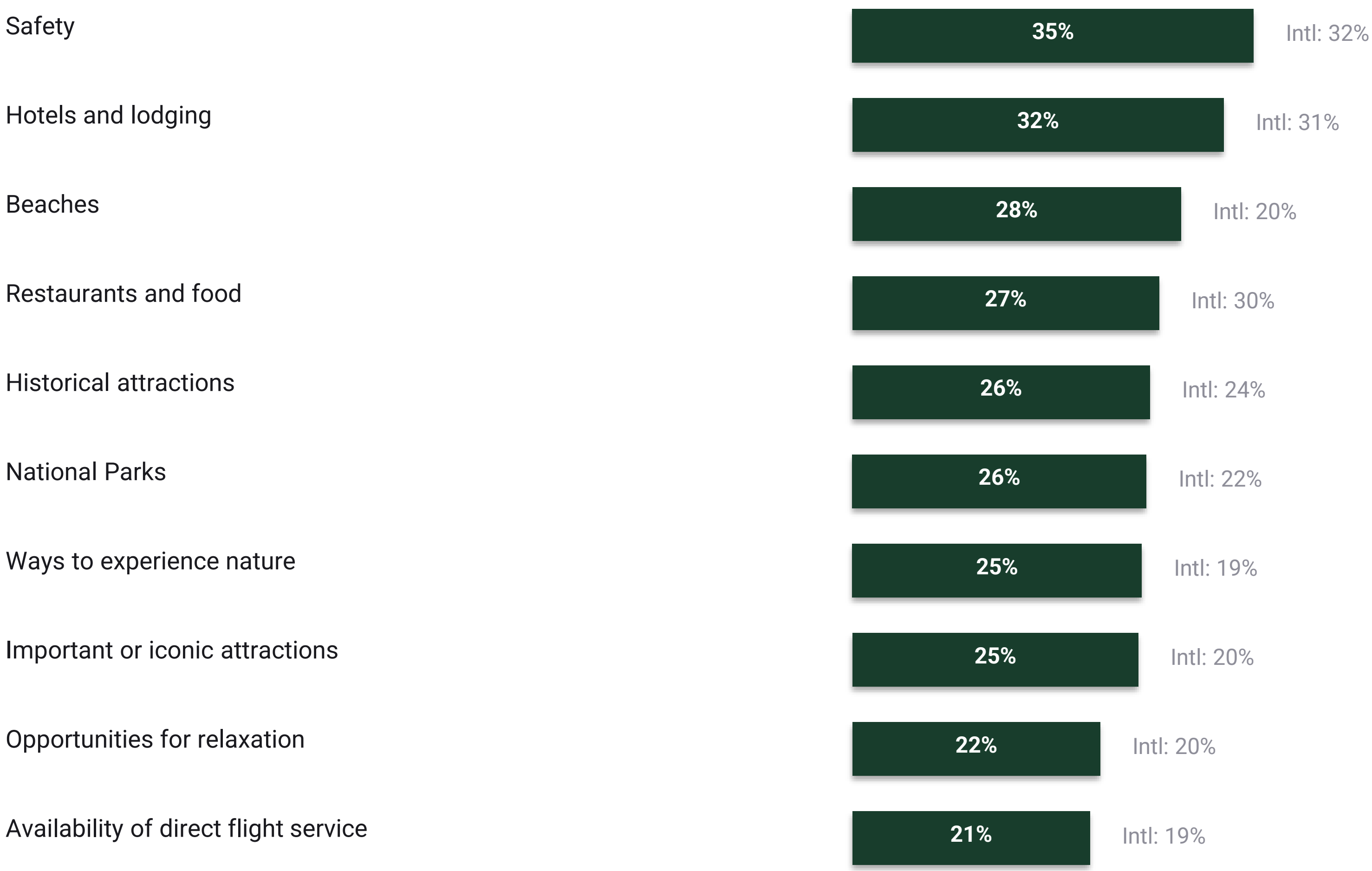
Germany



Source: Future Partners, Mar 2026

Top Information Sources

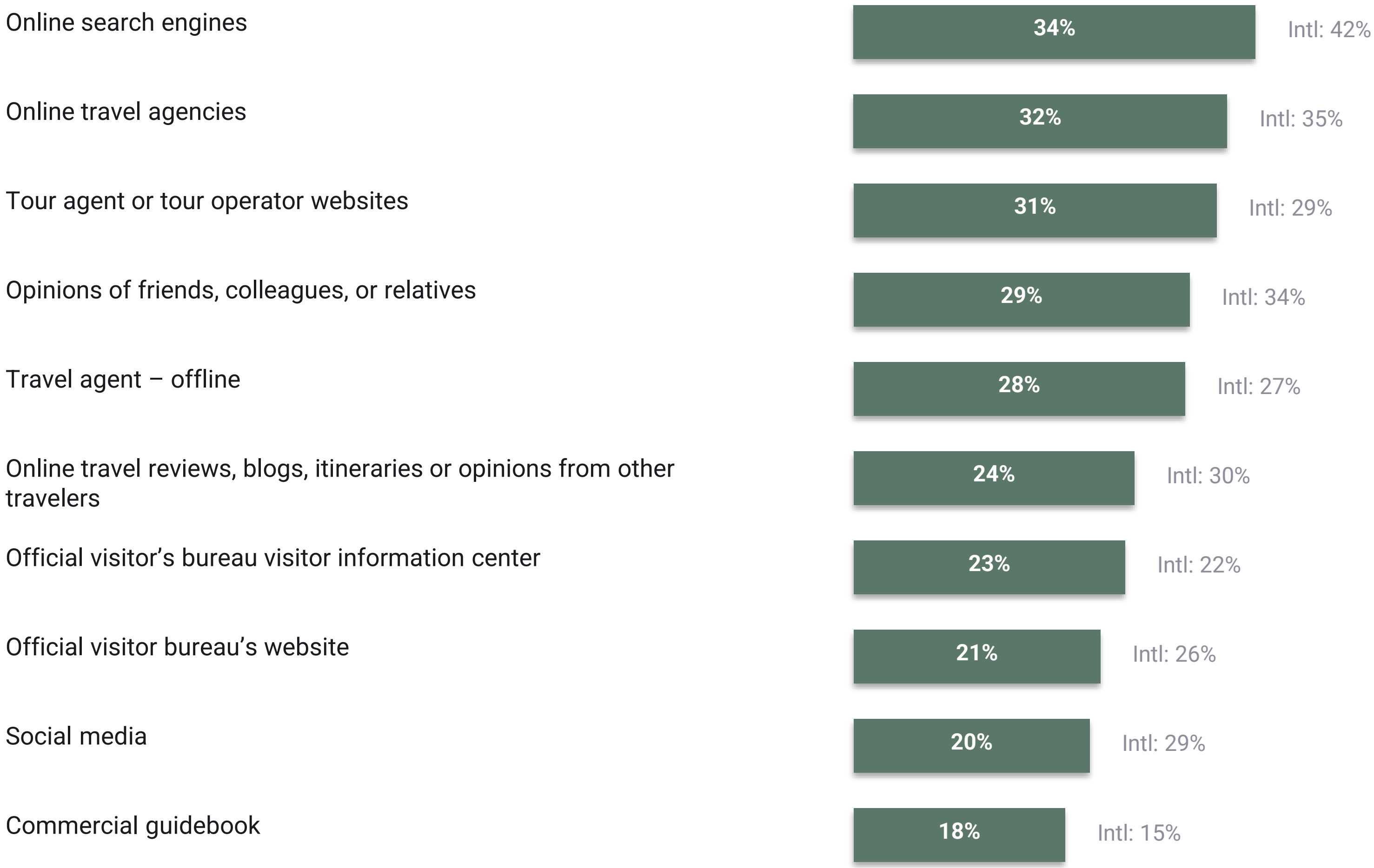
Germany



Source: Future Partners, Mar 2026

Planning Resources

Germany



U.S. Travel Planning & Budget

Germany

U.S. Trip Planning

24%
Likely to Visit US (2yr)
Intl Markets: 36%

15 wks
Planning Window
Intl Markets: 14 wks

14 wks
Booking Window
Intl Markets: 12 wks

U.S. Trip Profile

12.5
Avg Days in the U.S.
Intl Markets: 12.3

4.5
Avg Destinations in the U.S.
Intl Markets: 4.4

2.0
Avg Number of People Traveling with
Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

$1,693	$633	$677	$488	$636	$4,127
Hotels	Shopping	Dining	Sightseeing	Transport	Total
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

Enablers & Barriers to Visiting

Germany

Enablers

Enabler	Germany	Intl
To see beautiful landscapes/scenery	37%	Intl: 37%
To experience American cities	36%	Intl: 41%
To visit National Parks	36%	Intl: 32%
To experience American culture/lifestyle	31%	Intl: 34%
To go shopping	28%	Intl: 33%
To try local food, cuisine	28%	Intl: 29%
There is a variety of different places to visit	28%	Intl: 37%
It’s a bucket list destination	27%	Intl: 26%
Diversity of the people and cultures	25%	Intl: 24%
There is a variety of activities and attractions	25%	Intl: 32%

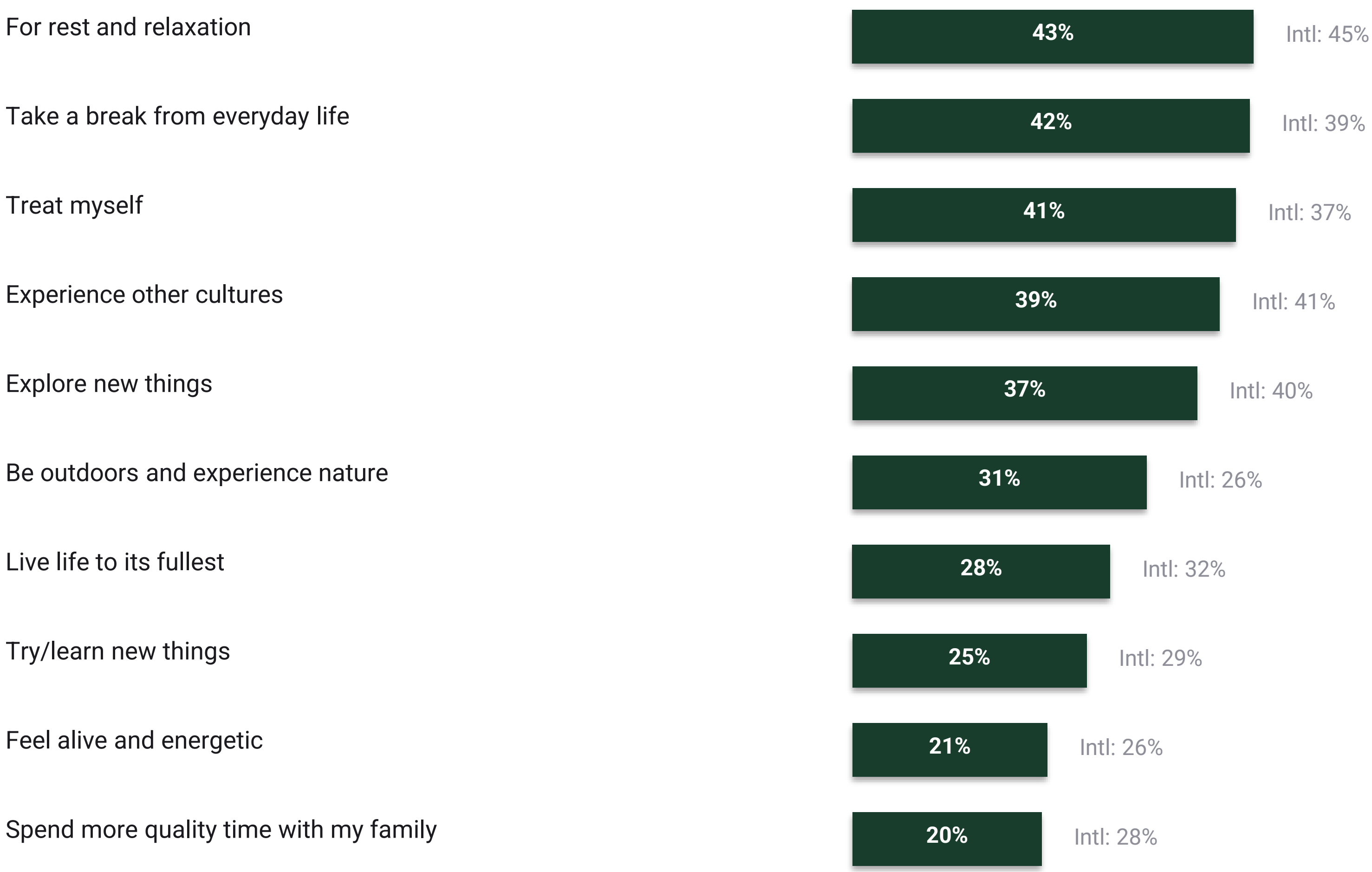
Barriers

Barrier	Germany	Intl
Political issues/unrest	66%	Intl: 64%
Safety concerns/it's dangerous	47%	Intl: 43%
More interested in other places	30%	Intl: 38%
Too far away/long flight	30%	Intl: 18%
Too expensive/bad exchange rate	29%	Intl: 31%
I dislike American culture	16%	Intl: 22%
I dislike American people	12%	Intl: 14%
Been there, done that	7%	Intl: 10%
Visa difficulties	0%	Intl: 7%

Source: Future Partners, Mar 2026

Travel Motivations

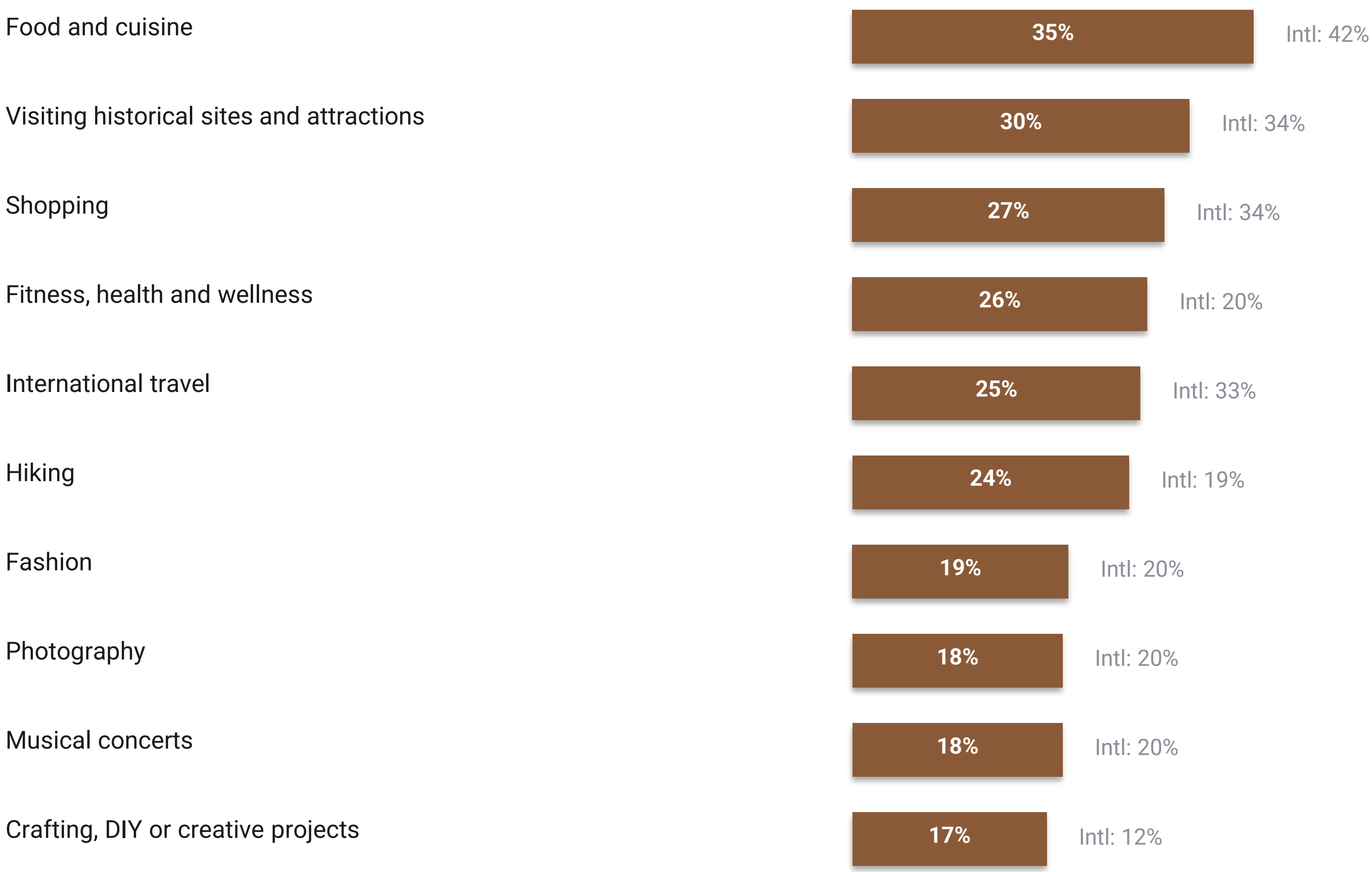
Germany



Source: Future Partners, Mar 2026

Hobbies & Passions

Germany



Source: Future Partners, Mar 2026

Travel Trends & Outlook

Germany

If a U.S. destination has a problem with over-tourism, I am less likely to visit it.

51%

Intl: 53%

Global wars/strife will impact the destinations I visit in 2025.

46%

Intl: 54%

Climate change will have a significant impact on my leisure travel in the next five (5) years.

36%

Intl: 42%

I'll be more proactive in reducing the impact of my travel on the environment.

35%

Intl: 43%

With higher temperatures each year, I will try to seek out cooler places.

30%

Intl: 44%

I am likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination).

30%

Intl: 42%

I anticipate that backlash against tourism will increase in my community in the next year.

28%

Intl: 34%

Luxury travel experiences are an important part of my leisure trips.

28%

Intl: 39%

I often bring work with me to do when I am on holiday.

21%

Intl: 27%

Germany Intl Markets

CANADA

Source Market Analysis | Alabama

#4 by Spending | #1 by Visits

Sweet Home Alabama
www.Alabama.Travel

TravelSouth USA
All Y'all Are Welcome

Canada | Key Findings

1. **2026 Alabama projected spending:** $38.9M (+6.6% YOY). Projected visitors: 57K (+5% YOY). Ranks #4 by spending and #1 by visits among Alabama source markets.
2. **Macro Context:** Canada 2026 GDP growth projected at 1.5%%. Exchange rate: 1.37 CAD/USD.
3. **CAGR Comparison:** 2023-2027 projected spending CAGR (-1.8%) exceeds 2015-2019 (-2.5%).
4. **Visitor Perceptions:** 66% familiarity with the American South, 70% appeal, 38% likely to visit in the next 5 years.
5. **U.S. Trip Profile:** Average spending $2,949 for a 2-week trip. Average length of stay: 8.4 days. Average destinations: 2.8.
6. **Top Motivation:** Treat myself (49%)
7. **Top Enabler:** To visit friends and/or family (39%)
8. **Preferred Tone:** Friendly/welcoming (54%)
9. **Top Barrier:** Political issues/unrest (90%)

Source: Tourism Economics, Feb 2026; Future Partners, Mar 2026

Canada

$38.9M
2026 Alabama Spending
+6.6% YOY vs. 2025

57K
2026 Alabama Visitors
+5% YOY vs. 2025

$16.4B
2026 USA Spending
+7.6% YOY vs. 2025

20.9M
2026 USA Visitors
+6.6% YOY vs. 2025

$36.5M
2025 Alabama Spending
-23.5% YOY vs. 2024

54.3K
2025 Alabama Visitors
-20.7% YOY vs. 2024

$15.2B
2025 USA Spending
-21.5% YOY vs. 2024

19.6M
2025 USA Visitors
-23.1% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015-2019 CAGR

-2.5%
Spending

-0.1%
Visits

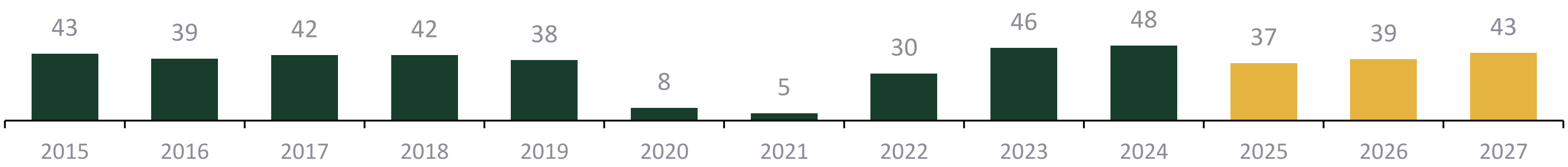
2023-2027 PROJECTED CAGR

-1.8%
Spending

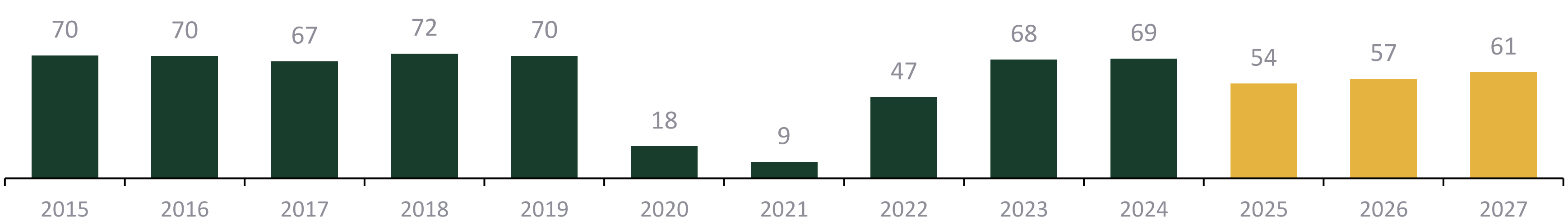
-2.8%
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Historic   Forecast

Visitor Perceptions | The American South

Canada

66%

Familiarity

Intl Markets: 67%

70%

Appeal

Intl Markets: 75%

24%

Promotional Buzz

Intl Markets: 29%

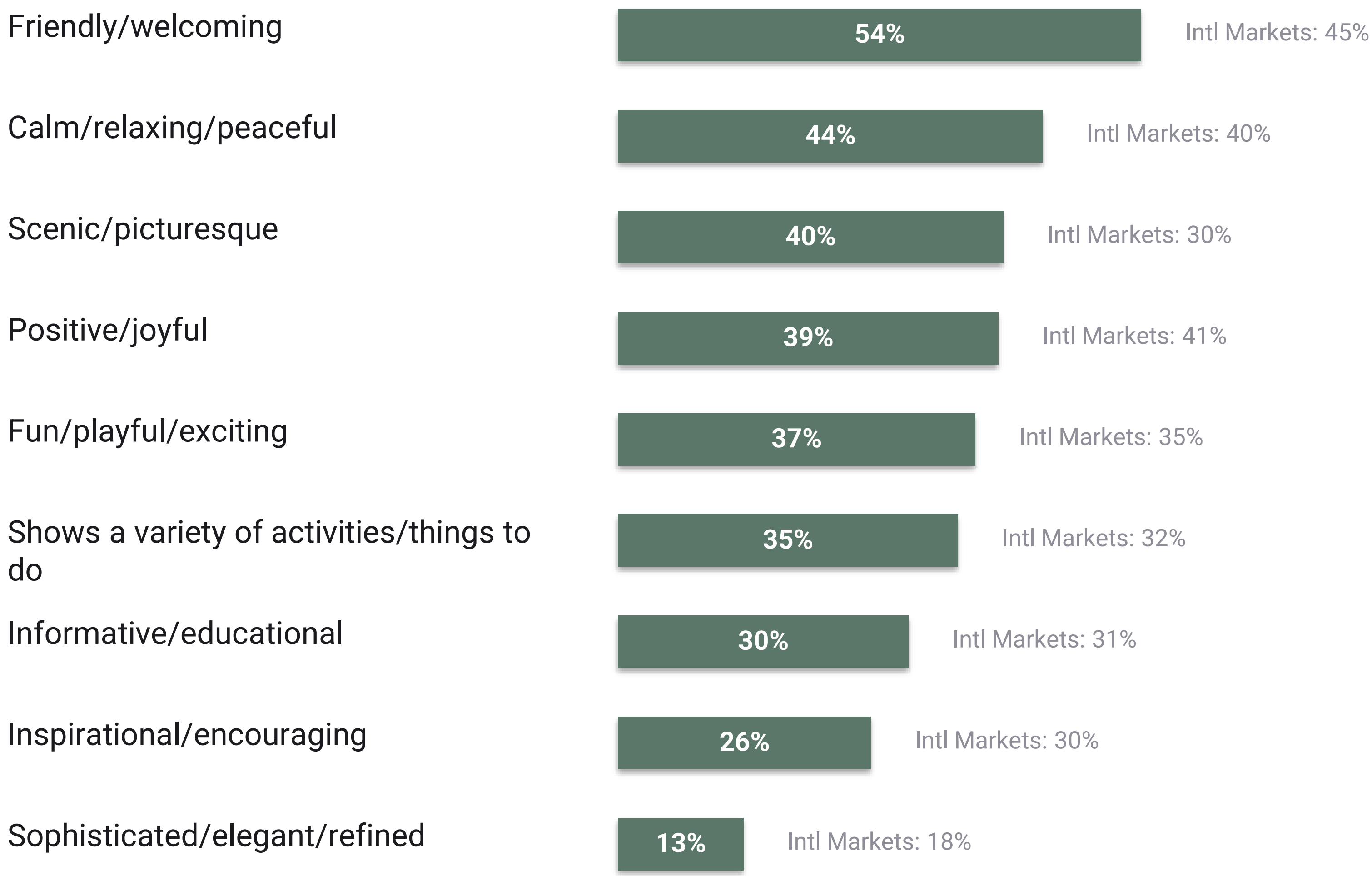
38%

Likely to Visit (5yr)

Intl Markets: 41%

Desired Travel Promotion Tone

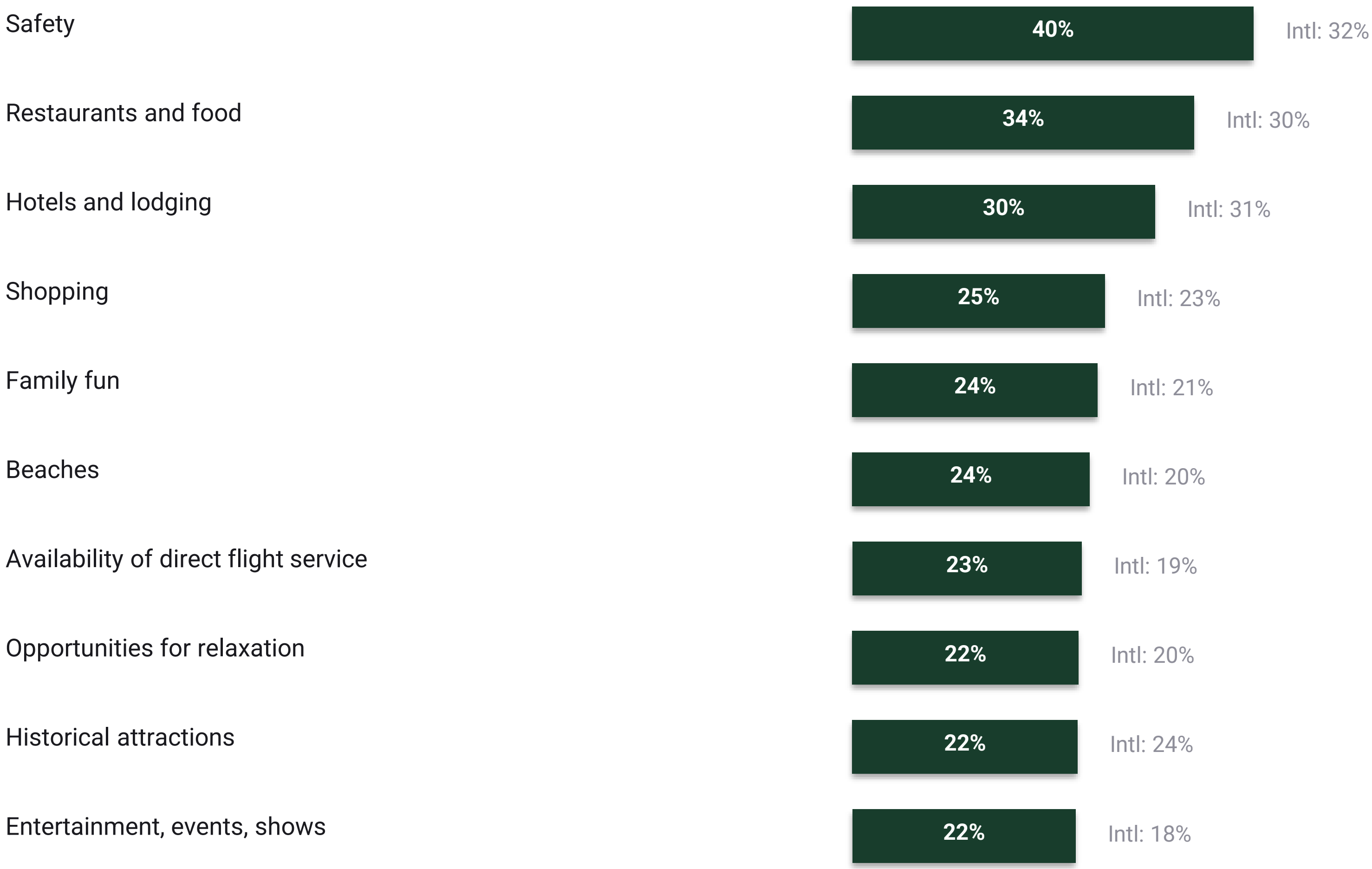
Canada



Source: Future Partners, Mar 2026

Top Information Sources

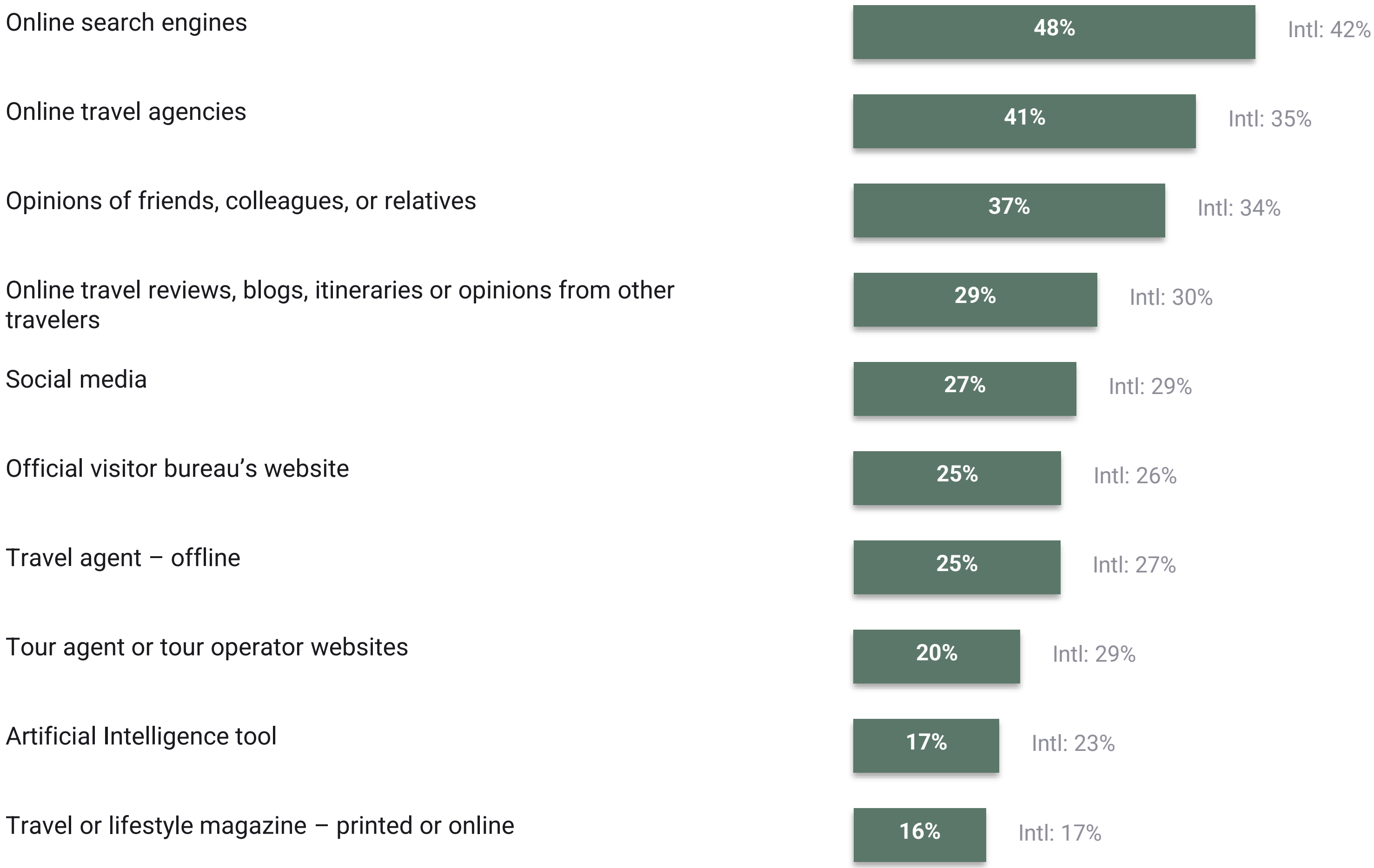
Canada



Source: Future Partners, Mar 2026

Planning Resources

Canada



Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

Canada

U.S. Trip Planning

36%	12 wks	11 wks
Likely to Visit US (2yr)	**Planning Window**	**Booking Window**
Intl Markets: 36%	Intl Markets: 14 wks	Intl Markets: 12 wks

U.S. Trip Profile

8.4	2.8	2.1
Avg Days in the U.S.	**Avg Destinations in the U.S.**	**Avg Number of People Traveling with**
Intl Markets: 12.3	Intl Markets: 4.4	Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

$1,095	$481	$510	$383	$480	$2,949
Hotels	**Shopping**	**Dining**	**Sightseeing**	**Transport**	**Total**
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

Source: Future Partners, Mar 2026

Enablers & Barriers to Visiting

Canada

Enablers

To visit friends and/or family	39%	Intl: 24%
To go shopping	34%	Intl: 33%
To see beautiful landscapes/scenery	33%	Intl: 37%
There is a variety of different places to visit	33%	Intl: 37%
To try local food, cuisine	32%	Intl: 29%
There is a variety of activities and attractions	31%	Intl: 32%
To experience American cities	29%	Intl: 41%
To visit National Parks	26%	Intl: 32%
To visit theme parks	25%	Intl: 34%
To experience American professional sports	18%	Intl: 19%

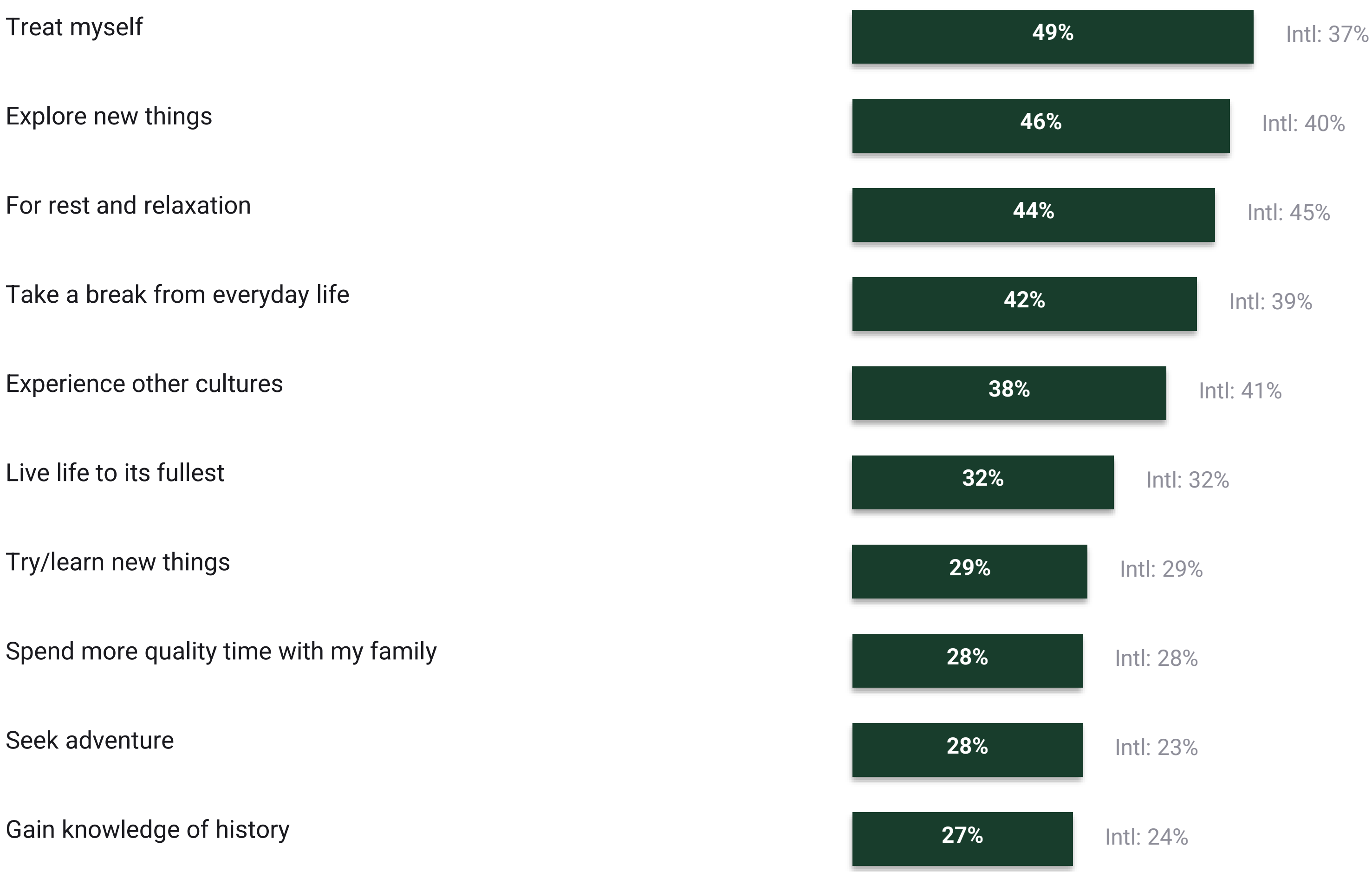
Barriers

Political issues/unrest	90%	Intl: 64%
Safety concerns/it's dangerous	56%	Intl: 43%
Too expensive/bad exchange rate	40%	Intl: 31%
More interested in other places	32%	Intl: 38%
I dislike American culture	20%	Intl: 22%
I dislike American people	13%	Intl: 14%
Been there, done that	13%	Intl: 10%
Too far away/long flight	3%	Intl: 18%
Visa difficulties	0%	Intl: 7%

Source: Future Partners, Mar 2026

Travel Motivations

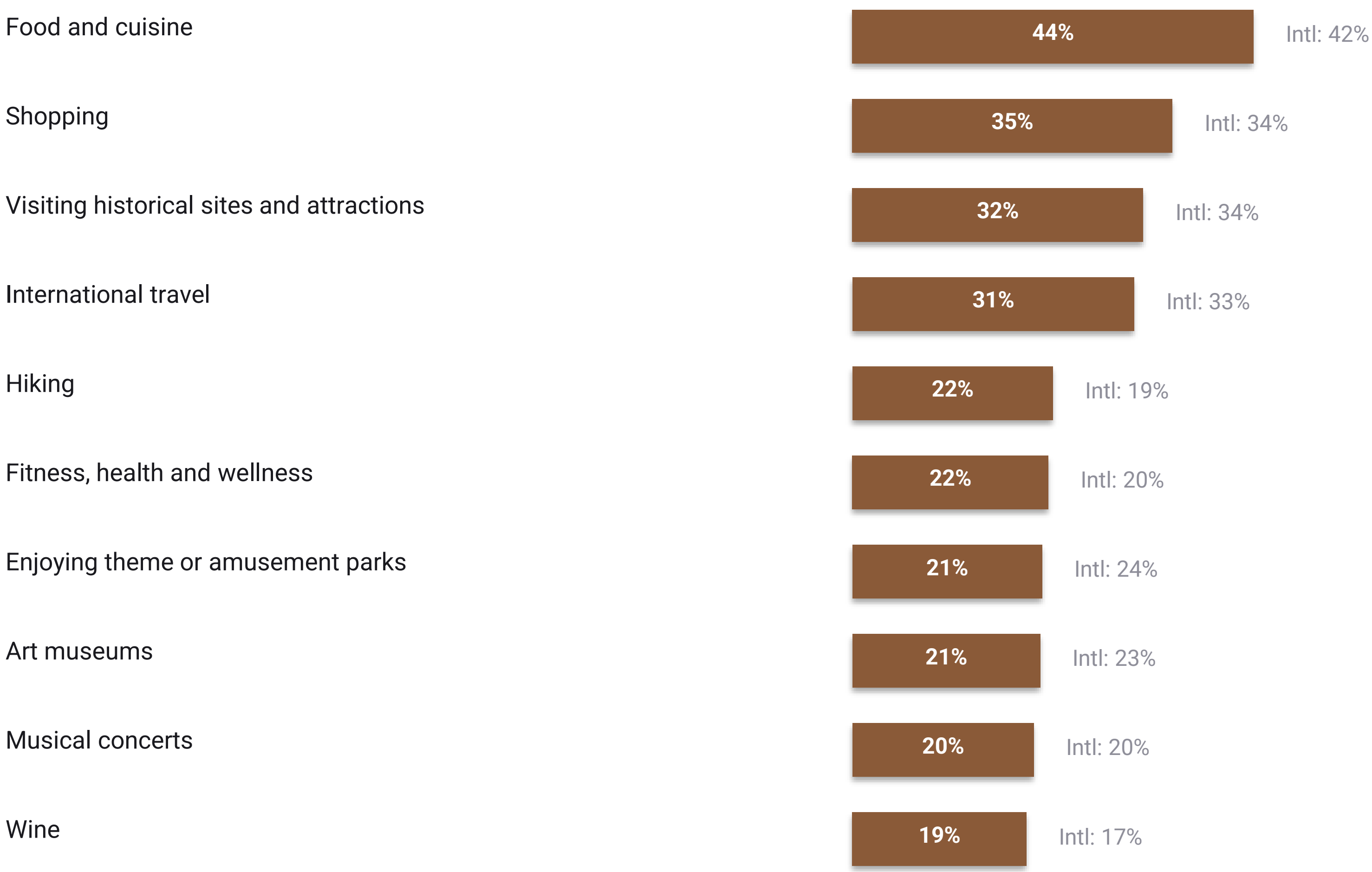
Canada



Source: Future Partners, Mar 2026

Hobbies & Passions

Canada



Source: Future Partners, Mar 2026

Travel Trends & Outlook

Canada

Global wars/strife will impact the destinations I visit in 2025.

59%

Intl: 54%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it.

53%

Intl: 53%

I am likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination).

40%

Intl: 42%

Climate change will have a significant impact on my leisure travel in the next five (5) years.

37%

Intl: 42%

Luxury travel experiences are an important part of my leisure trips.

36%

Intl: 39%

I anticipate that backlash against tourism will increase in my community in the next year.

35%

Intl: 34%

I'll be more proactive in reducing the impact of my travel on the environment.

34%

Intl: 43%

With higher temperatures each year, I will try to seek out cooler places.

33%

Intl: 44%

I often bring work with me to do when I am on holiday.

24%

Intl: 27%

Canada Intl Markets

Source: Future Partners, Mar 2026

BRAZIL

Source Market Analysis | Alabama

#5 by Spending | #11 by Visits

Sweet Home Alabama
www.Alabama.Travel

Travel South USA
All Y'all Are Welcome

Brazil | Key Findings

1. **2026 Alabama projected spending:** $34.4M (+8.9% YOY). Projected visitors: 8.4K (+5% YOY). Ranks #5 by spending and #11 by visits among Alabama source markets.
2. **Macro Context:** Brazil 2026 GDP growth projected at 1.9%%. Exchange rate: 5.15 BRL/USD.
3. **CAGR Comparison:** 2023-2027 projected spending CAGR (13.5%) exceeds 2015-2019 (0.1%).
4. **Visitor Perceptions:** 72% familiarity with the American South, 82% appeal, 49% likely to visit in the next 5 years.
5. **U.S. Trip Profile:** Average spending $4,812 for a 2-week trip. Average length of stay: 14.8 days. Average destinations: 5.3.
6. **Top Motivation:** For rest and relaxation (54%)
7. **Top Enabler:** To go shopping (54%)
8. **Preferred Tone:** Positive/joyful (51%)
9. **Top Barrier:** Political issues/unrest (70%)

Source: Tourism Economics, Feb 2026; Future Partners, Mar 2026

Brazil

$34.4M
2026 Alabama Spending
+8.9% YOY vs. 2025

8.4K
2026 Alabama Visitors
+5% YOY vs. 2025

$8.4B
2026 USA Spending
+7.2% YOY vs. 2025

3M
2026 USA Visitors
+3.8% YOY vs. 2025

$31.6M
2025 Alabama Spending
+13.7% YOY vs. 2024

8K
2025 Alabama Visitors
+1.3% YOY vs. 2024

$7.9B
2025 USA Spending
+11.4% YOY vs. 2024

2.9M
2025 USA Visitors
0% YOY vs. 2024

Growth Trajectory

2015–2019 CAGR

0.1% Spending

-2.2% Visits

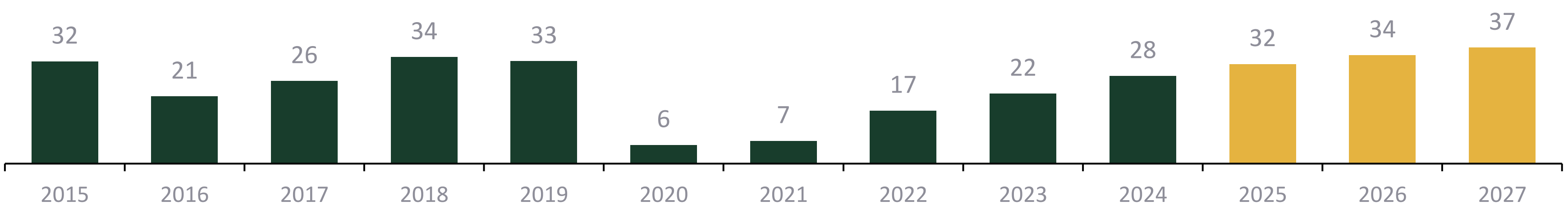
2023–2027 PROJECTED CAGR

13.5% Spending

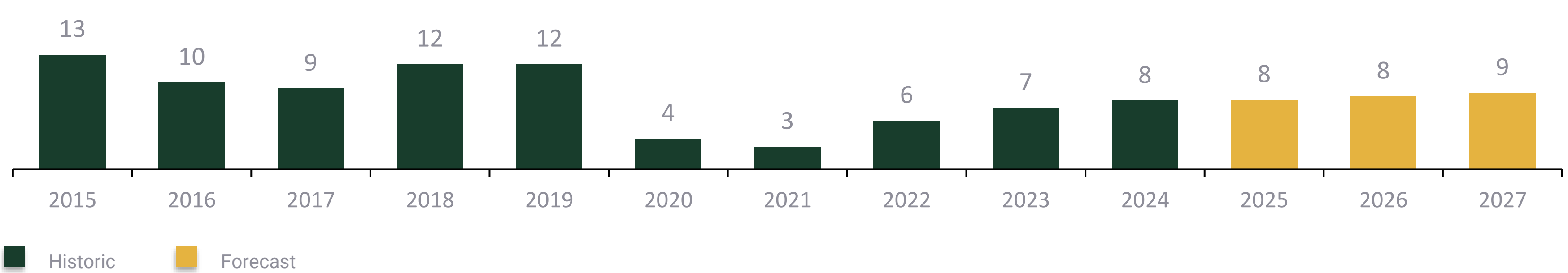
5.5% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

Brazil

72%
Familiarity
Intl Markets: 67%

82%
Appeal
Intl Markets: 75%

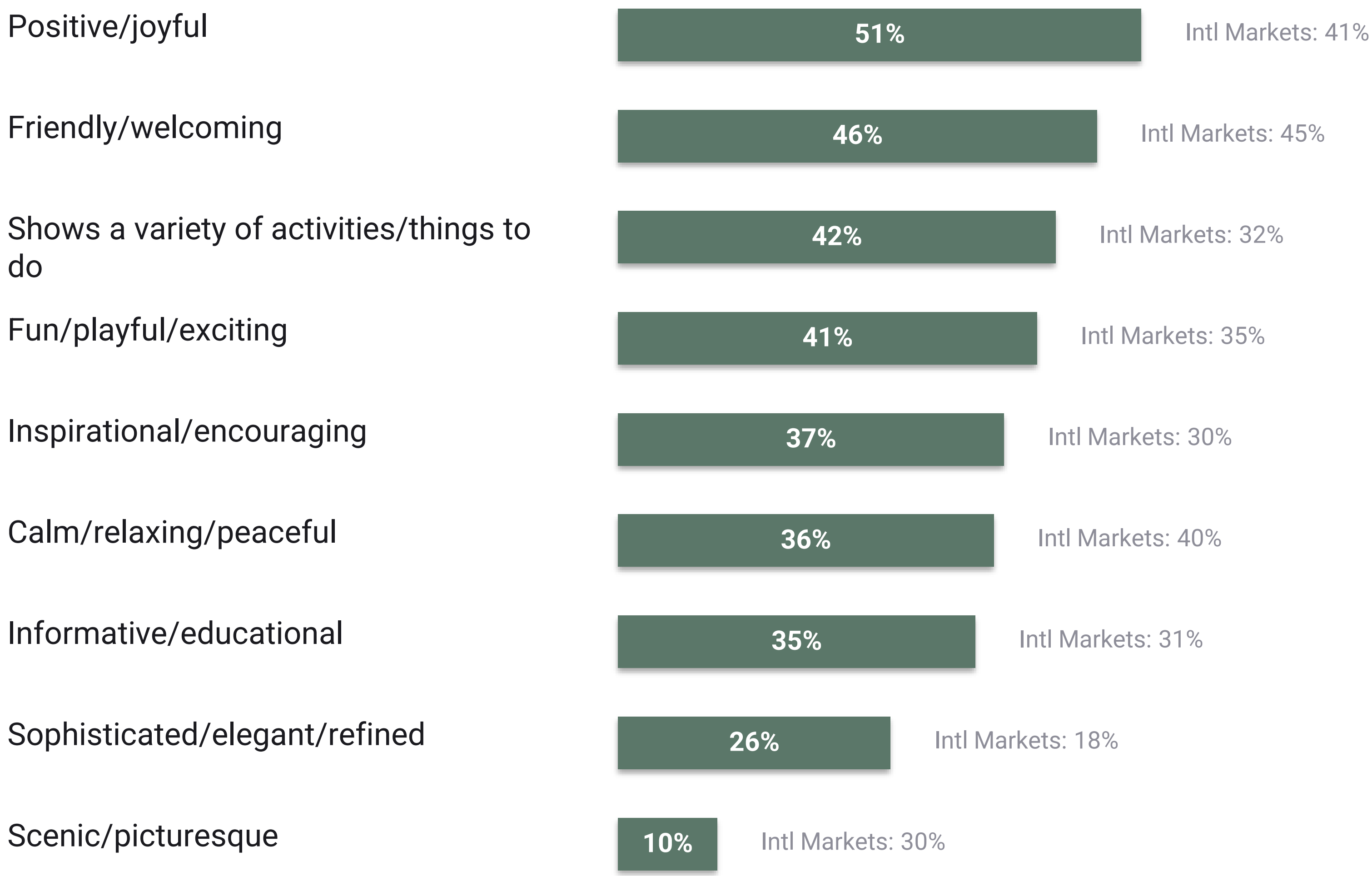
30%
Promotional Buzz
Intl Markets: 29%

49%
Likely to Visit (5yr)
Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

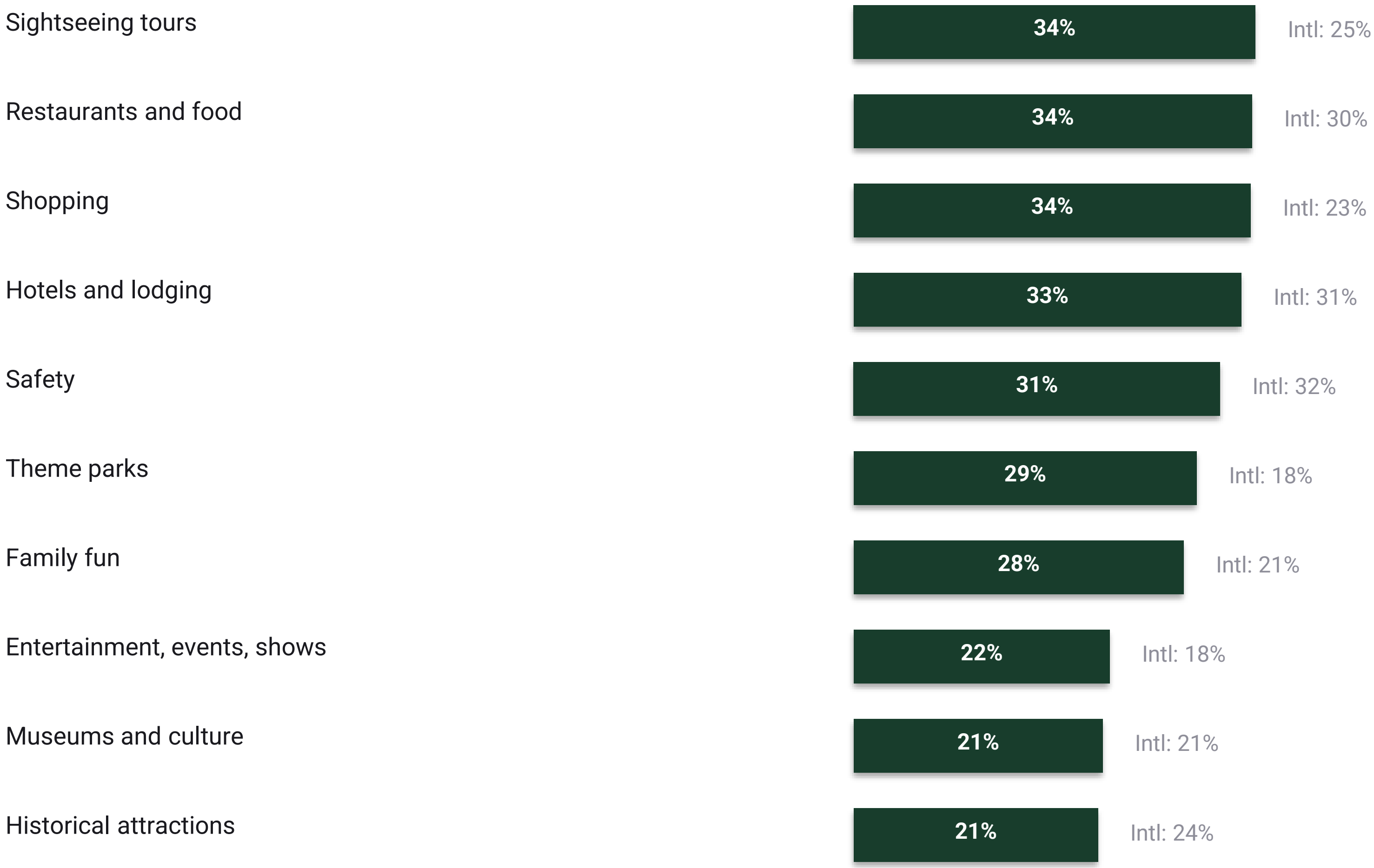
Brazil



Source: Future Partners, Mar 2026

Top Information Sources

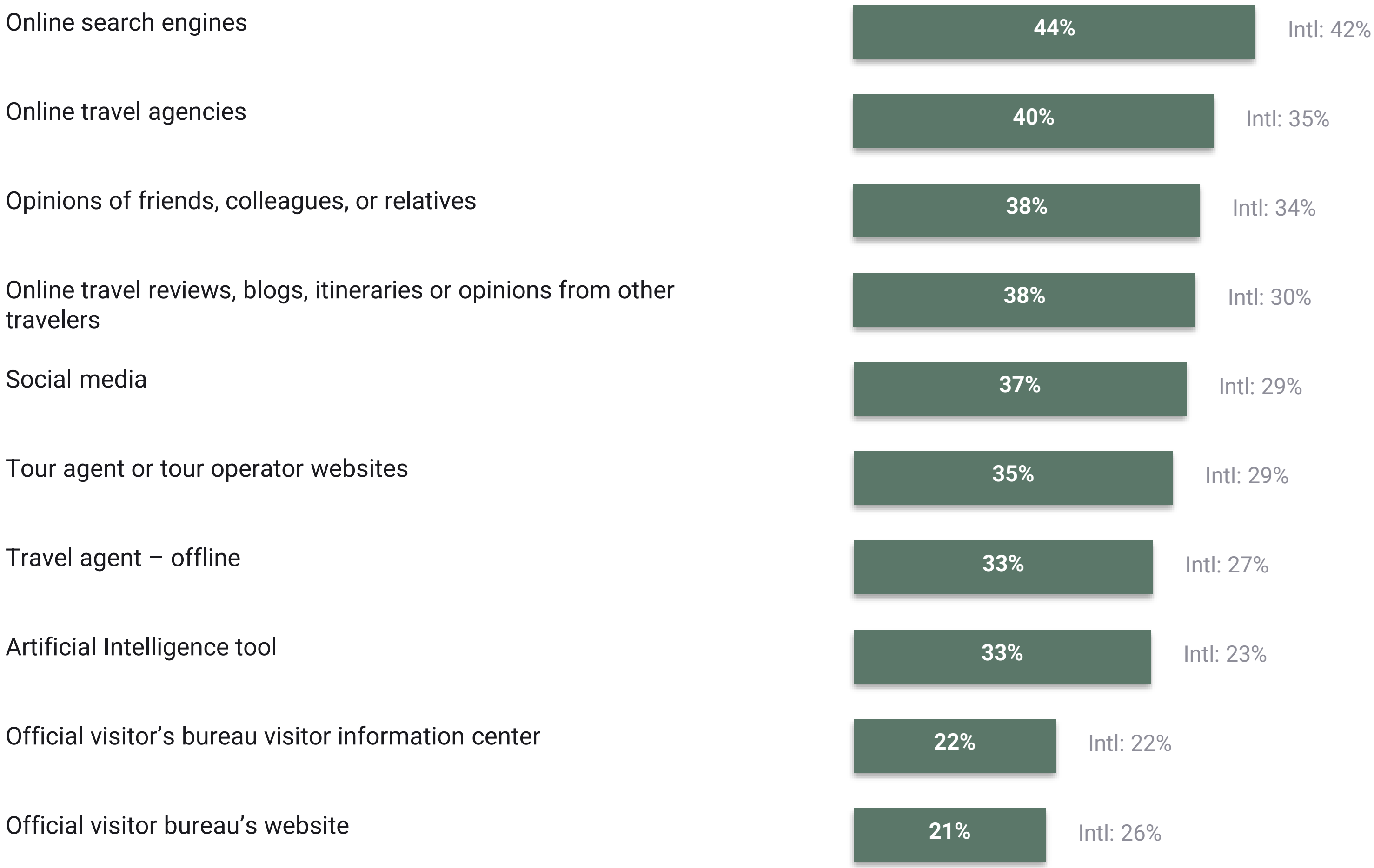
Brazil



Source: Future Partners, Mar 2026

Planning Resources

Brazil



Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

Brazil

U.S. Trip Planning

52%	16 wks	14 wks
Likely to Visit US (2yr)	Planning Window	Booking Window
Intl Markets: 36%	Intl Markets: 14 wks	Intl Markets: 12 wks

U.S. Trip Profile

14.8	5.3	2.9
Avg Days in the U.S.	Avg Destinations in the U.S.	Avg Number of People Traveling with
Intl Markets: 12.3	Intl Markets: 4.4	Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

$1,391	$1,127	$774	$897	$623	$4,812
Hotels	Shopping	Dining	Sightseeing	Transport	Total
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

Enablers & Barriers to Visiting

Brazil

Enablers

To go shopping	54%	Intl: 33%
To visit theme parks	44%	Intl: 34%
There is a variety of different places to visit	43%	Intl: 37%
To experience American cities	41%	Intl: 41%
There is a variety of activities and attractions	37%	Intl: 32%
To experience American culture/lifestyle	36%	Intl: 34%
To see beautiful landscapes/scenery	34%	Intl: 37%
To visit National Parks	32%	Intl: 32%
To try local food, cuisine	31%	Intl: 29%
It’s a bucket list destination	29%	Intl: 26%

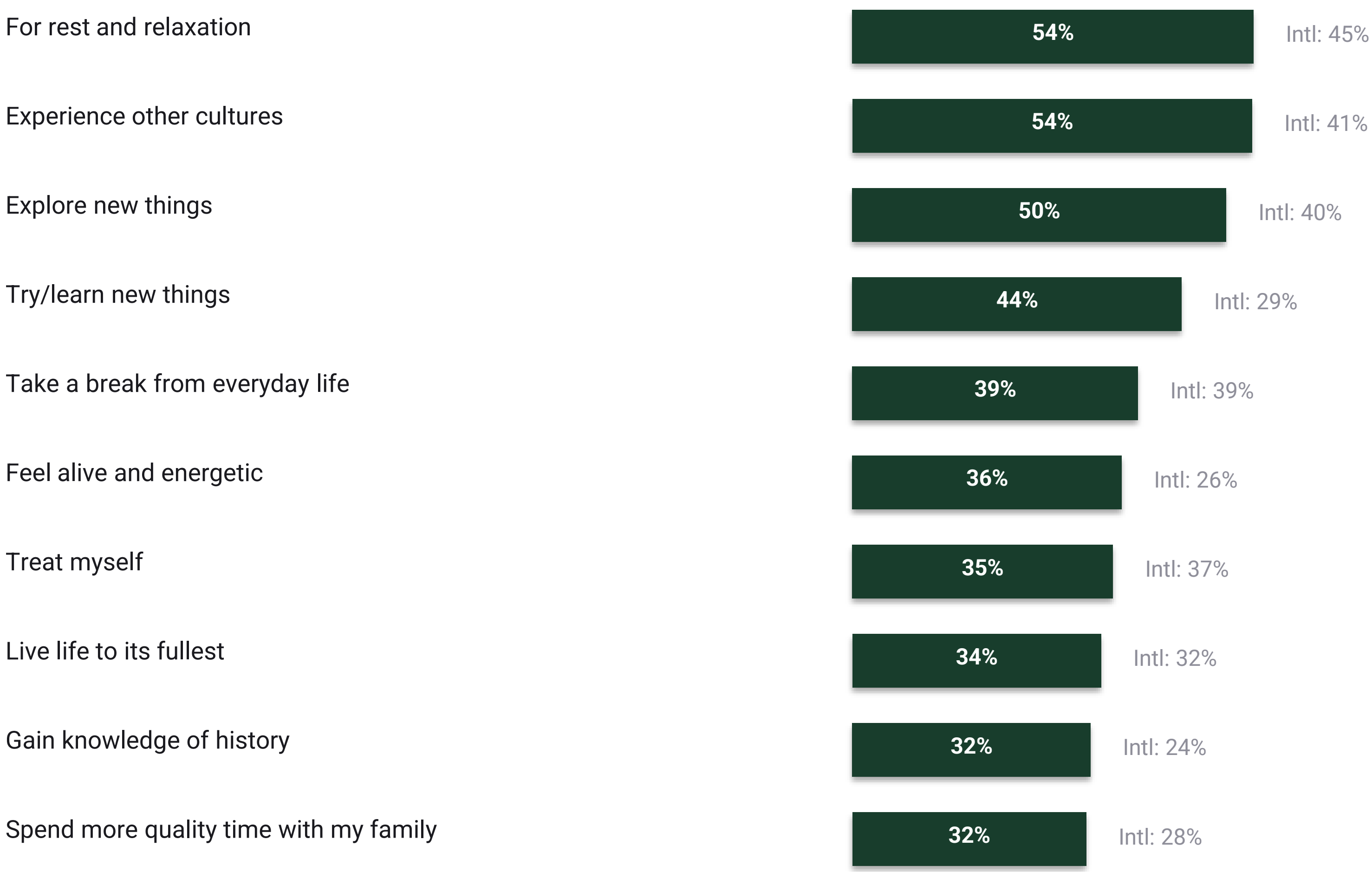
Barriers

Political issues/unrest	70%	Intl: 64%
Visa difficulties	48%	Intl: 7%
More interested in other places	41%	Intl: 38%
Safety concerns/it's dangerous	35%	Intl: 43%
Too expensive/bad exchange rate	28%	Intl: 31%
I dislike American culture	22%	Intl: 22%
I dislike American people	15%	Intl: 14%
Been there, done that	7%	Intl: 10%
Too far away/long flight	2%	Intl: 18%

Source: Future Partners, Mar 2026

Travel Motivations

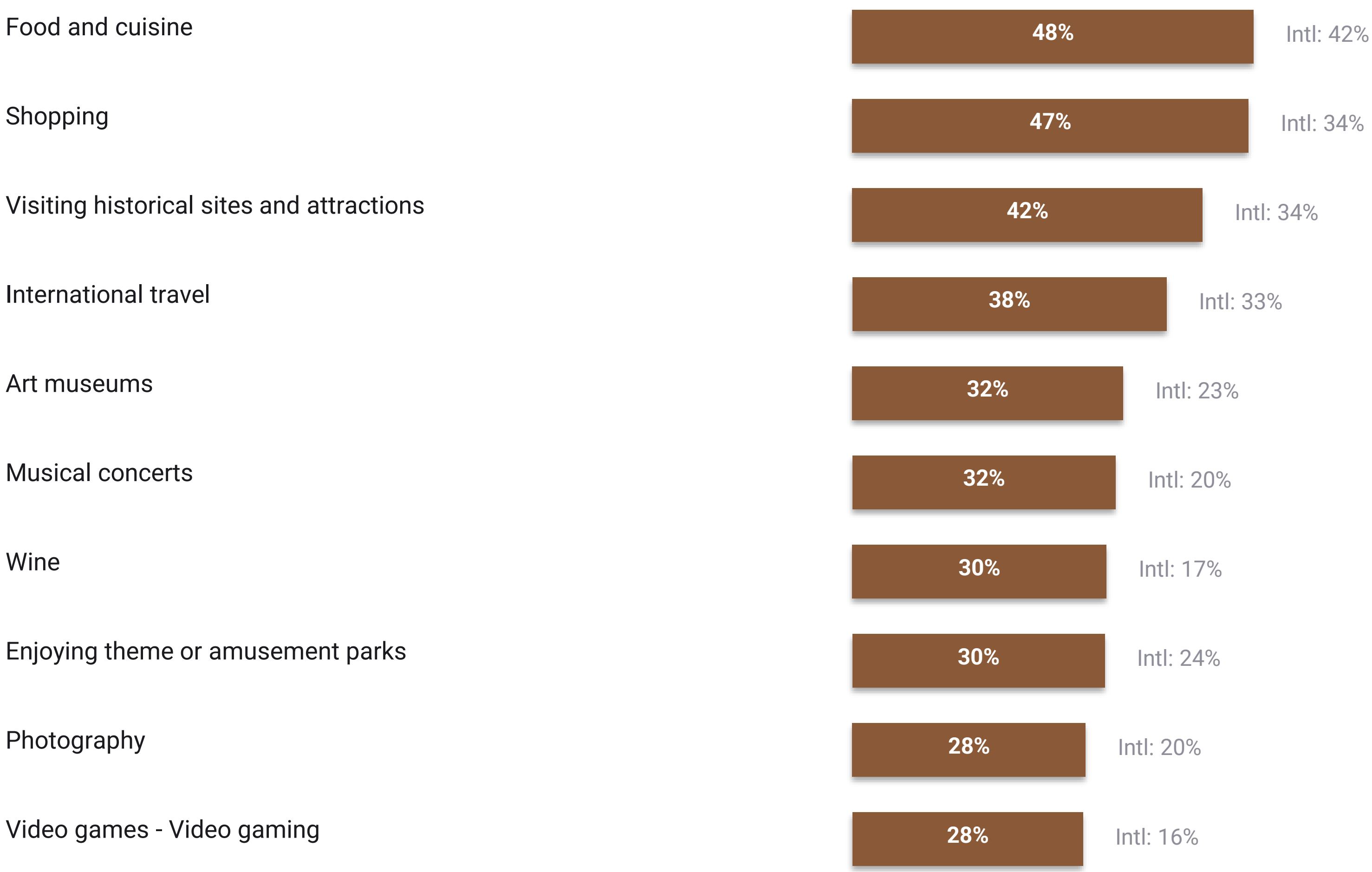
Brazil



Source: Future Partners, Mar 2026

Hobbies & Passions

Brazil



Source: Future Partners, Mar 2026

Travel Trends & Outlook

Brazil

I am likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination).

66%

Intl: 42%

Global wars/strife will impact the destinations I visit in 2025.

64%

Intl: 54%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it.

59%

Intl: 53%

I'll be more proactive in reducing the impact of my travel on the environment.

54%

Intl: 43%

Climate change will have a significant impact on my leisure travel in the next five (5) years.

54%

Intl: 42%

With higher temperatures each year, I will try to seek out cooler places.

50%

Intl: 44%

Luxury travel experiences are an important part of my leisure trips.

44%

Intl: 39%

I anticipate that backlash against tourism will increase in my community in the next year.

40%

Intl: 34%

I often bring work with me to do when I am on holiday.

33%

Intl: 27%

Brazil Intl Markets

Source: Future Partners, Mar 2026

Sweet Home Alabama

www.Alabama.Travel

International Visitor Profile

Compiled by Esra Calvert Consulting on behalf of Travel South USA.
Data partners include Tourism Economics, Future Partners, Brand USA, and third-party sources.

Travel South USA

All Y'all Are Welcome