



International Visitor Profile

Key Findings

- 1 2026 projected spending:** \$122.0M (+5.7% YOY). Projected visitors: 110.7K (+3.5% YOY).
- 2 Top 10 Source Markets by Spending:** UK + Ireland (\$10.6M), India (\$8.7M), Canada (\$8.0M), Brazil (\$7.5M), Mexico (\$7.0M), DACH Region (\$6.9M), China (\$6.8M), Australia (\$5.5M), Japan (\$4.9M), France (\$3.1M).
- 3 Top 5 Growth Markets (Spending YOY):** Taiwan (+15.2%), Bulgaria (+15.0%), Israel (+13.1%), Singapore (+12.3%), Indonesia (+11.4%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-10.9%), Turkey (-2.1%), Greece (-0.3%).
- 5** UK + Ireland leads by spending (\$10.6M). Mexico leads by visits (24.9K).
- 6 CAGR:** 2023-2027 projected spending CAGR (8.0%) exceeds 2015-2019 (1.6%).
- 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%)

Arkansas

\$122.0M

2026 Projected Spending

+5.7% YOY vs. 2025

\$107.0M

2026 Overseas Spending

+5.6% YOY vs. 2025

\$115.4M

2025 Projected Spending

0.0% YOY vs. 2024

\$101.3M

2025 Overseas Spending

+1.8% YOY vs. 2024

110.7K

2026 Projected Visitors

+3.5% YOY vs. 2025

66.7K

2026 Overseas Visitors

+3.2% YOY vs. 2025

107.0K

2025 Projected Visitors

-4.3% YOY vs. 2024

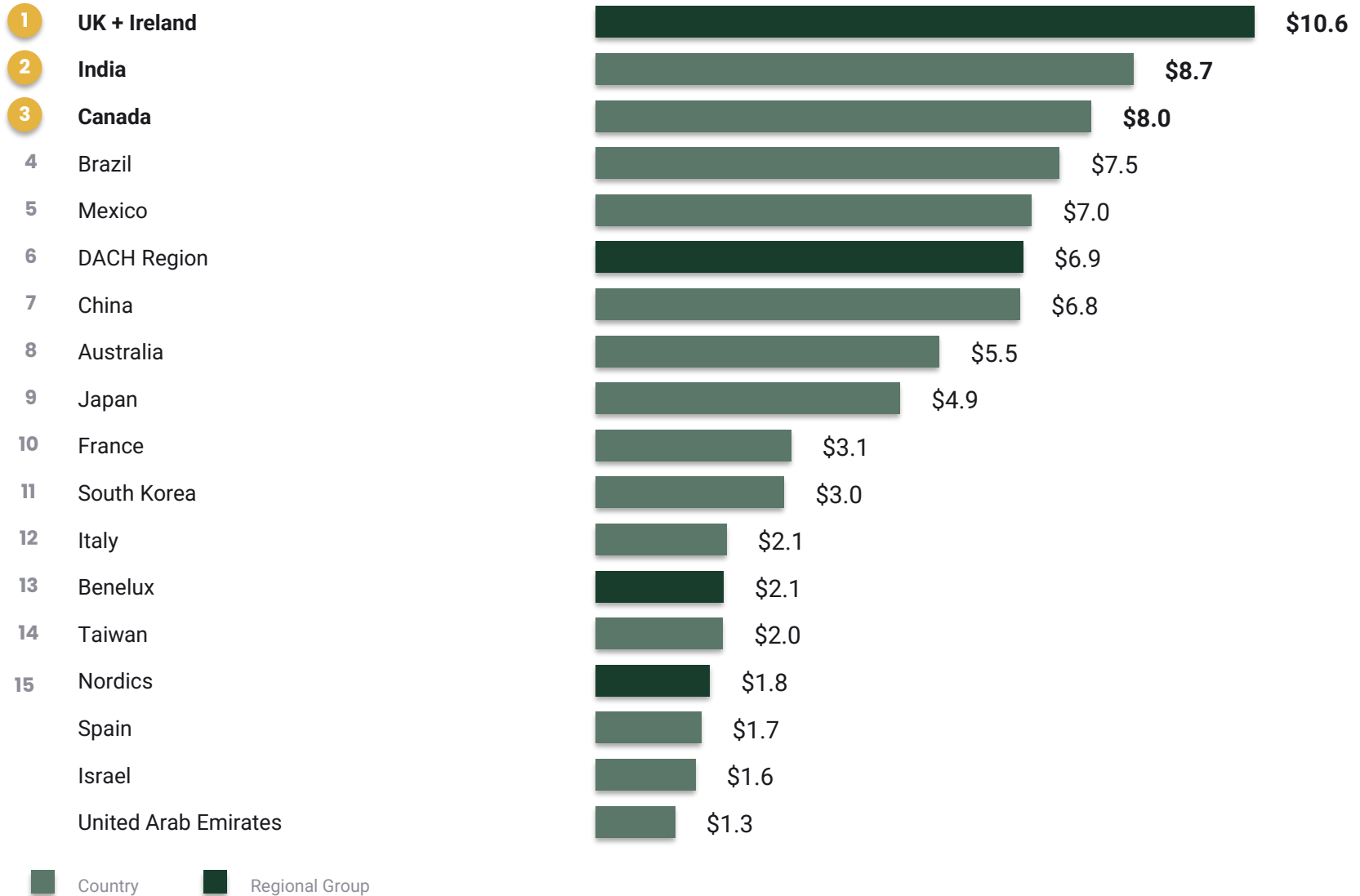
64.6K

2025 Overseas Visitors

-2.7% YOY vs. 2024

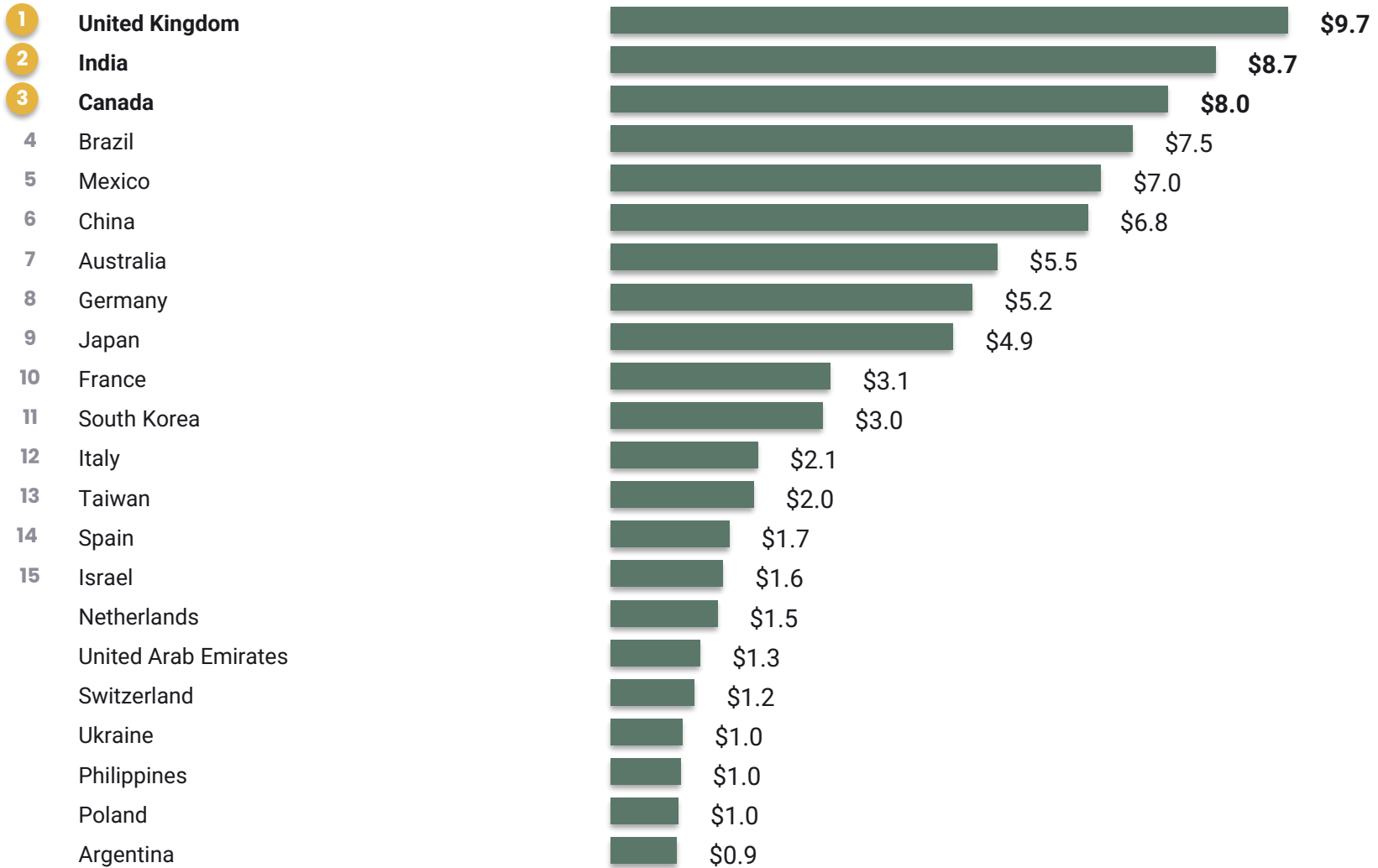
Top Source Markets | 2026 Projections

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



Top Source Markets | 2026 Projections | Detailed

Spending (\$ millions) by individual country



Top Markets Detail | 2026 Projections

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

| # | Market | Spending (\$M) | Visits (K) | Spend Δ% | Visits Δ% |
|----|----------------------|----------------|------------|----------|-----------|
| 1 | United Kingdom | \$9.7 | 6.6 | +2.6% | +4.0% |
| 2 | India | \$8.7 | 5.1 | +5.9% | +1.2% |
| 3 | Canada | \$8.0 | 19.1 | +6.7% | +5.1% |
| 4 | Brazil | \$7.5 | 2.9 | +8.8% | +5.1% |
| 5 | Mexico | \$7.0 | 24.9 | +6.8% | +2.6% |
| 6 | China | \$6.8 | 2.9 | +3.6% | +3.1% |
| 7 | Australia | \$5.5 | 2.8 | +5.5% | +3.3% |
| 8 | Germany | \$5.2 | 2.5 | +7.7% | +3.5% |
| 9 | Japan | \$4.9 | 3.7 | +7.0% | +7.7% |
| 10 | France | \$3.1 | 2.8 | +3.5% | +1.4% |
| 11 | South Korea | \$3.0 | 2.9 | +5.2% | +5.9% |
| 12 | Italy | \$2.1 | 1.5 | +4.2% | +1.8% |
| 13 | Taiwan | \$2.0 | 1.1 | +15.2% | +6.1% |
| 14 | Spain | \$1.7 | 1.4 | +10.4% | +2.7% |
| 15 | Israel | \$1.6 | 1.6 | +13.1% | +1.6% |
| 16 | Netherlands | \$1.5 | 1.1 | +6.9% | +3.9% |
| 17 | United Arab Emirates | \$1.3 | 0.4 | +3.3% | +9.3% |
| 18 | Switzerland | \$1.2 | 0.8 | +10.9% | +5.5% |
| 19 | Ukraine | \$1.0 | 0.1 | +6.3% | +1.1% |
| 20 | Philippines | \$1.0 | 0.7 | +11.0% | +5.7% |
| 21 | Poland | \$1.0 | 0.6 | +1.2% | -3.2% |
| 22 | Argentina | \$0.9 | 0.8 | +5.7% | +3.2% |

% Change | 2025 Projections vs. 2024

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

| # | Market | Spending %Δ | Visits %Δ |
|----|----------------------|-------------|-----------|
| 1 | United Kingdom | +14.5% | +1.4% |
| 2 | India | -4.8% | -4.4% |
| 3 | Canada | -22.1% | -21.1% |
| 4 | Brazil | +14.4% | +0.7% |
| 5 | Mexico | +4.5% | +8.7% |
| 6 | China | +4.5% | -3.7% |
| 7 | Australia | -15.7% | -6.8% |
| 8 | Germany | +6.9% | -10.5% |
| 9 | Japan | +10.7% | +4.9% |
| 10 | France | -3.4% | -7.3% |
| 11 | South Korea | -16.5% | -6.1% |
| 12 | Italy | +13.8% | +6.2% |
| 13 | Taiwan | +33.9% | +9.3% |
| 14 | Spain | +12.5% | +0.8% |
| 15 | Israel | -5.2% | +15.2% |
| 16 | Netherlands | +13.2% | -7.3% |
| 17 | United Arab Emirates | +3.9% | -3.9% |
| 18 | Switzerland | -22.1% | -10.6% |
| 19 | Ukraine | +35.7% | +6.1% |
| 20 | Philippines | -8.7% | -14.8% |
| 21 | Poland | -3.6% | +3.8% |
| 22 | Argentina | +14.8% | +16.7% |

 Decline  Growth

Growth Trajectory

2015-2019 CAGR

1.6%

Spending

1.4%

Visits

2023-2027 PROJECTED CAGR

8.0%

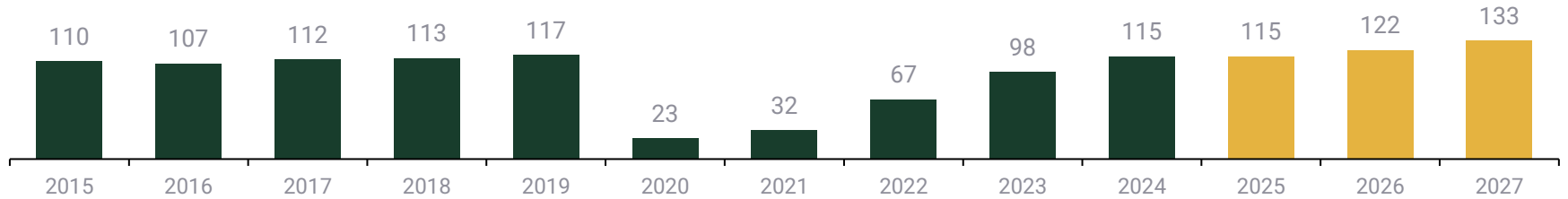
Spending

3.5%

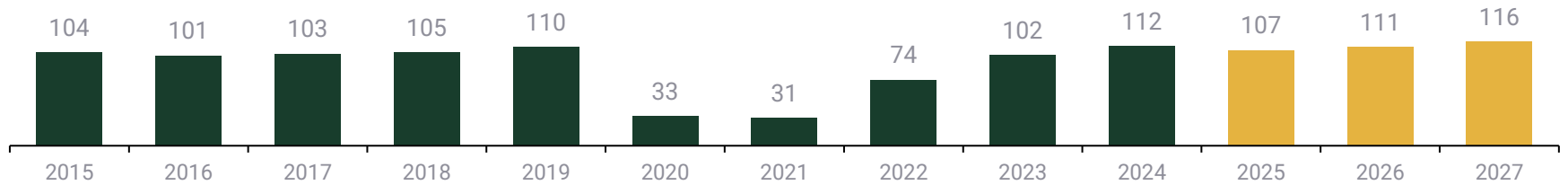
Visits

CAGR is Compound Annual Growth Rate.

Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Macro Context

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

United Kingdom

1.3%

GDP % Change

1.35

GBP/USD

India

6.2%

GDP % Change

90.92

INR/USD

Canada

1.5%

GDP % Change

1.37

CAD/USD

Brazil

1.9%

GDP % Change

5.15

BRL/USD

Mexico

1.5%

GDP % Change

17.23

MXN/USD

China

4.2%

GDP % Change

6.84

CNY/USD

Australia

2.1%

GDP % Change

0.71

AUD/USD

Germany

0.9%

GDP % Change

1.18

EUR/USD

Japan

0.6%

GDP % Change

156.13

JPY/USD

France

0.9%

GDP % Change

1.18

EUR/USD

Visitor Perceptions | The American South

International Markets

67%

Familiarity

75%

Appeal

29%

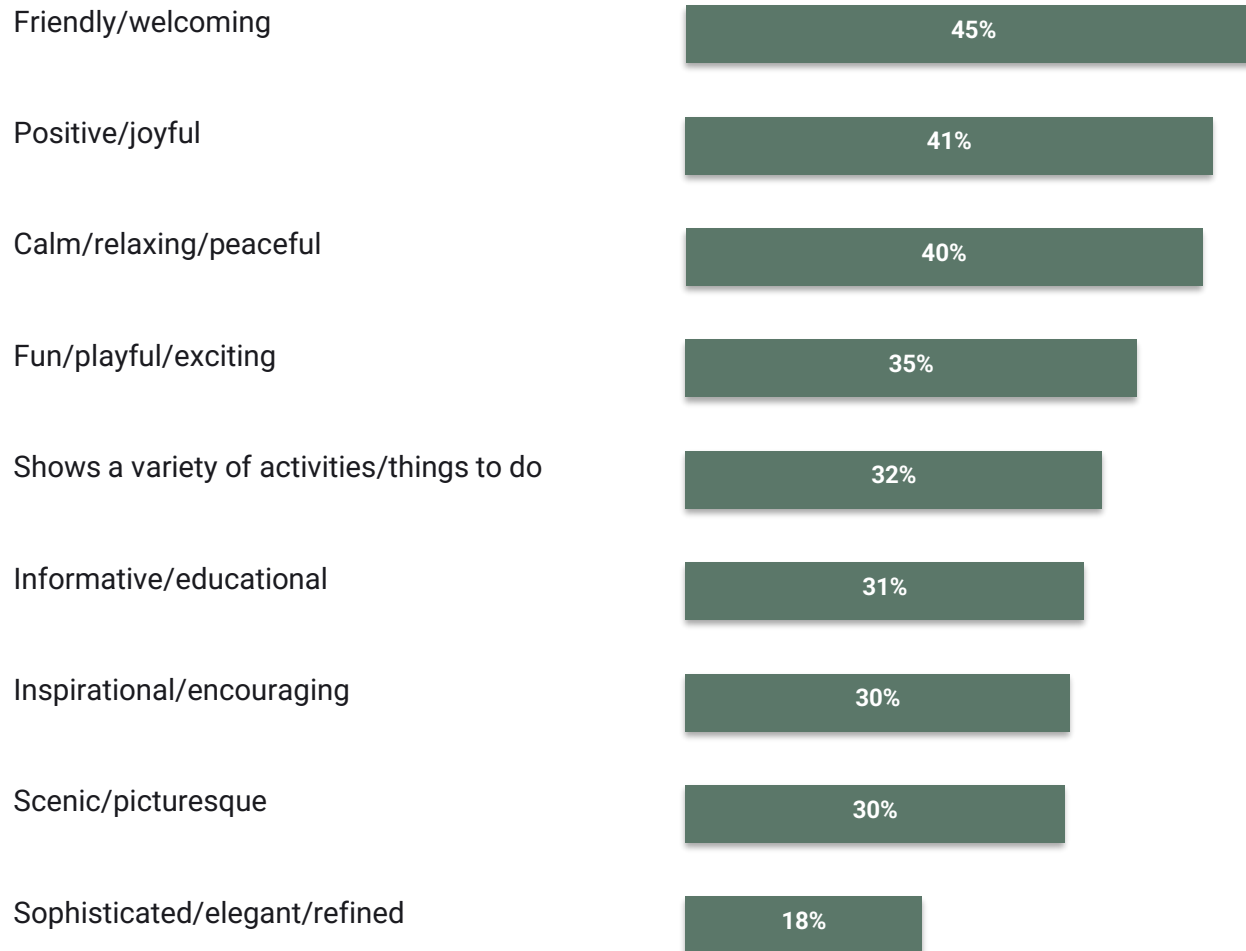
Promotional Buzz

41%

Likely to Visit (5yr)

Desired Travel Promotion Tone

International Markets



U.S. Travel Planning & Budget

Total international

U.S. Trip Planning

36%

Likely to Visit US (2yr)

Intl Markets: 36%

14 wks

Planning Window

Intl Markets: 14 wks

12 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

12.3

Avg Days in the U.S.

Intl Markets: 12.3

4.4

Avg Destinations in the U.S.

Intl Markets: 4.4

2.6

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,568

Hotels

Intl: \$1,568

\$1,001

Shopping

Intl: \$1,001

\$826

Dining

Intl: \$826

\$881

Sightseeing

Intl: \$881

\$772

Transport

Intl: \$772

\$5,049

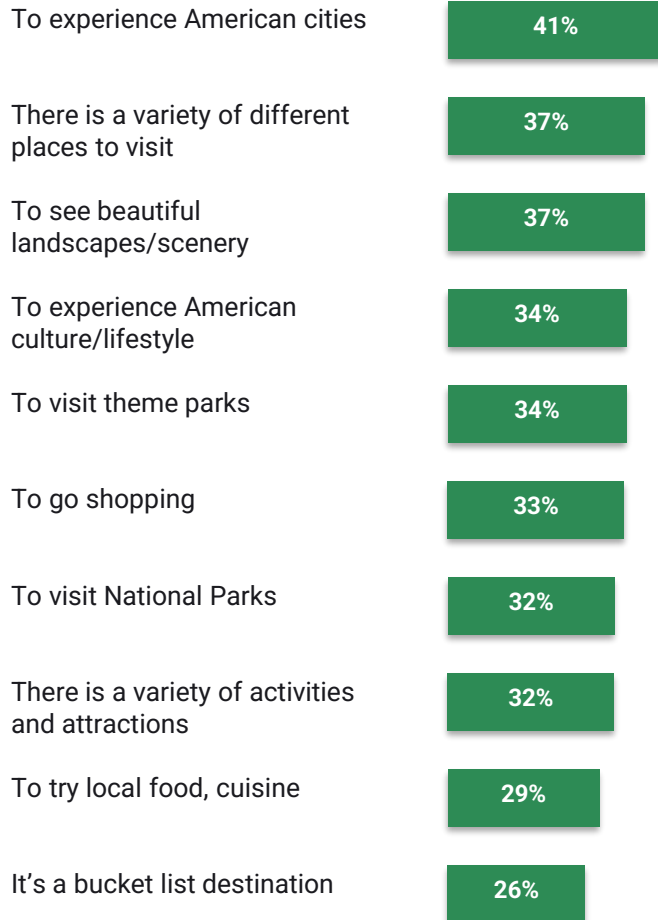
Total

Intl: \$5,049

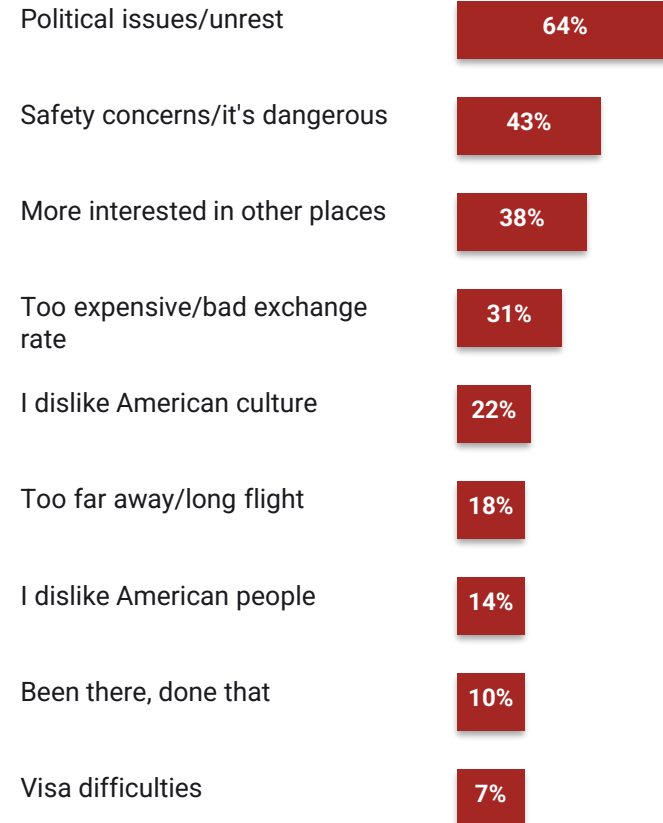
Enablers & Barriers to Visiting

International Markets

Enablers

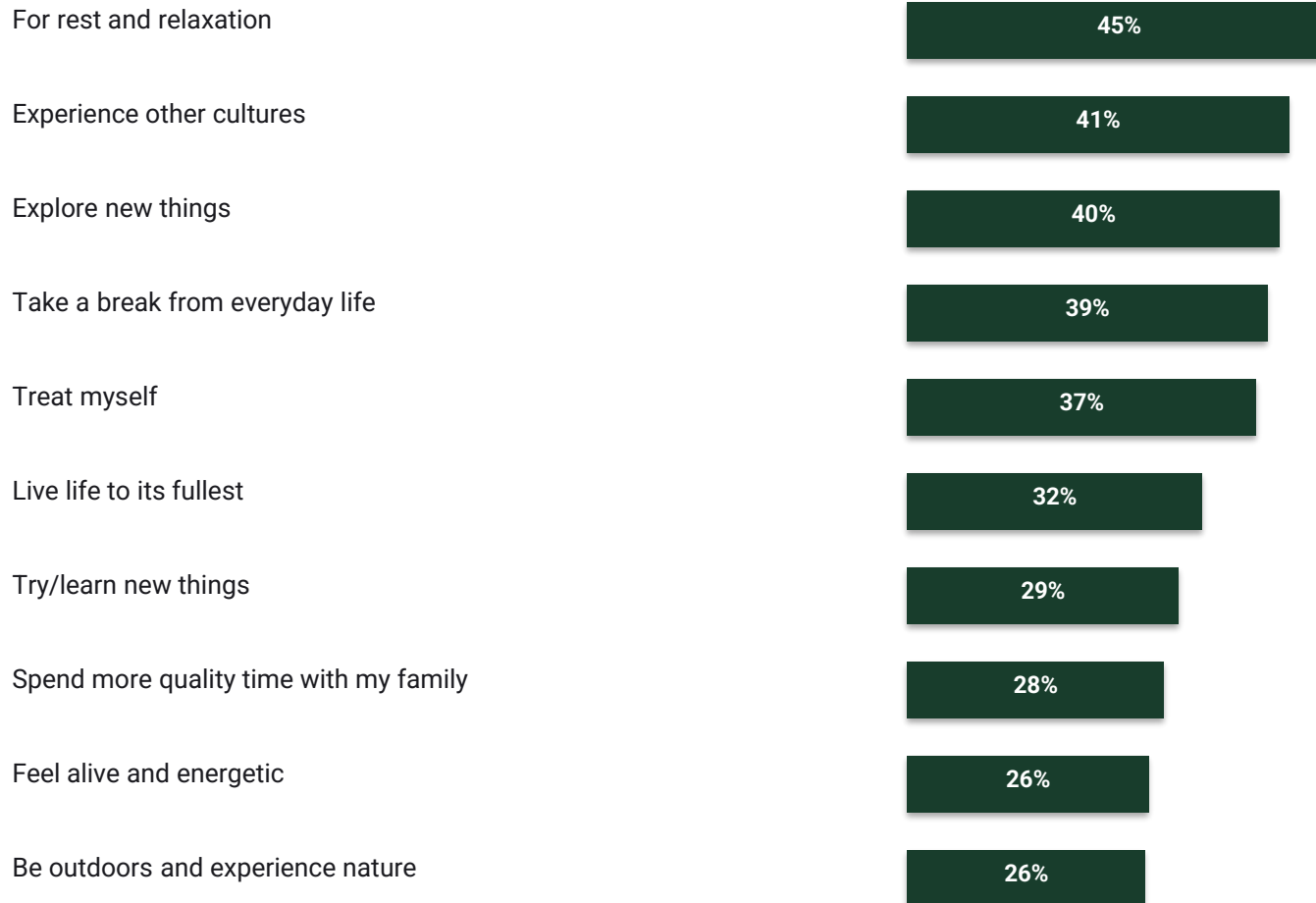


Barriers



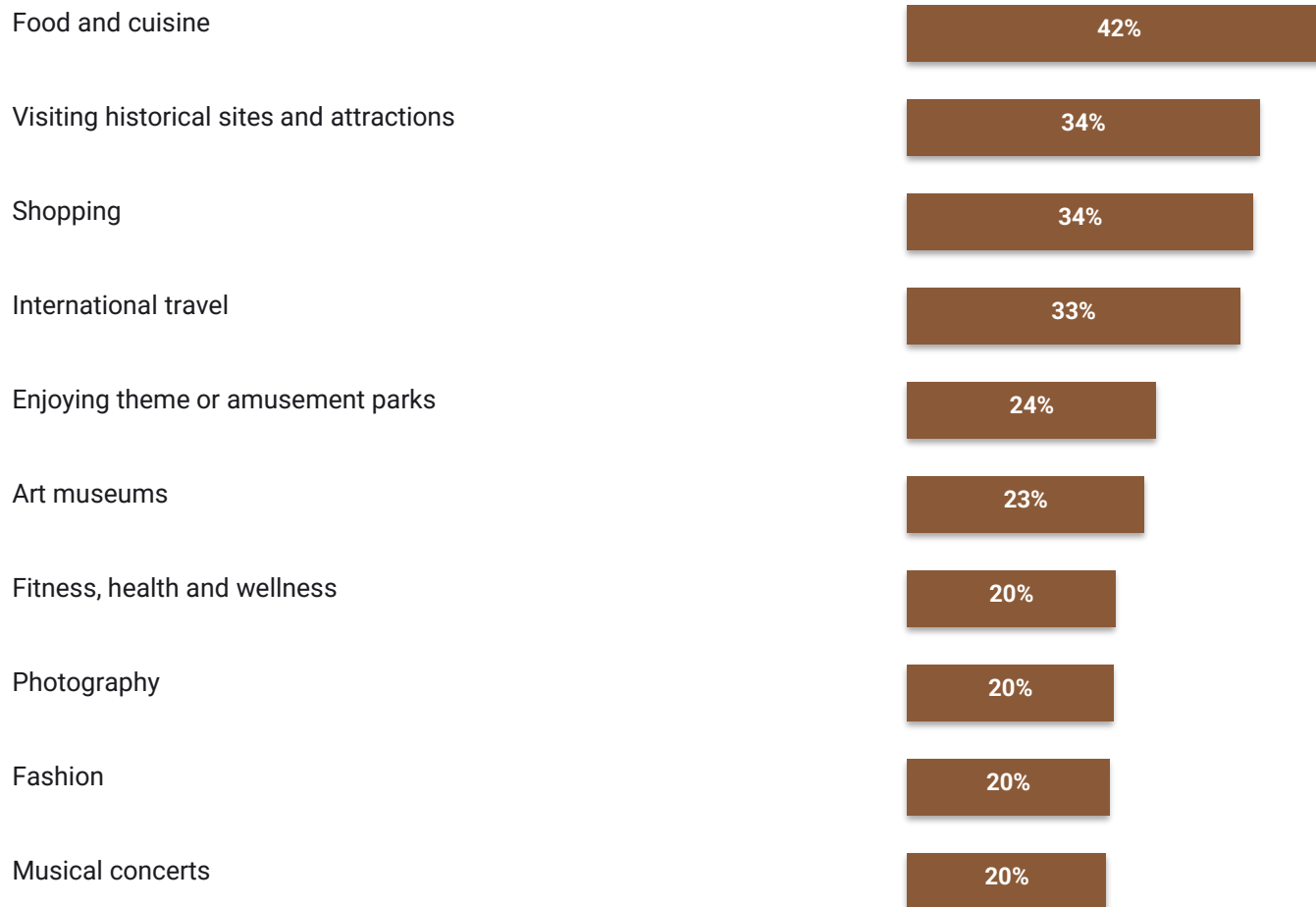
Travel Motivations

International Markets



Hobbies & Passions

International Markets



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%



Top Five Markets by Spending

International Visitor Economy & Profiles by Country

UNITED KINGDOM

Source Market Analysis | Arkansas

#1 by Spending | #3 by Visits



TravelSouth
All Y'all Are Welcome USA

United Kingdom | Key Findings

- 1 2026 Arkansas projected spending:** \$9.7M (+2.1% YOY). Projected visitors: 6.6K (+3.1% YOY). Ranks #1 by spending and #3 by visits among Arkansas 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 (6.1%) exceeds 2015-2019 (1.9%).
- 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%)

United Kingdom

\$9.7M

2026 Arkansas Spending

+2.1% YOY vs. 2025

6.6K

2026 Arkansas Visitors

+3.1% YOY vs. 2025

\$11.9B

2026 USA Spending

+3.3% YOY vs. 2025

5.8M

2026 USA Visitors

+3.5% YOY vs. 2025

\$9.5M

2025 Arkansas Spending

+14.5% YOY vs. 2024

6.4K

2025 Arkansas Visitors

+1.6% YOY vs. 2024

\$11.5B

2025 USA Spending

+9.4% YOY vs. 2024

5.6M

2025 USA Visitors

-0.1% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

1.9%

Spending

0.4%

Visits

2023-2027 PROJECTED CAGR

6.1%

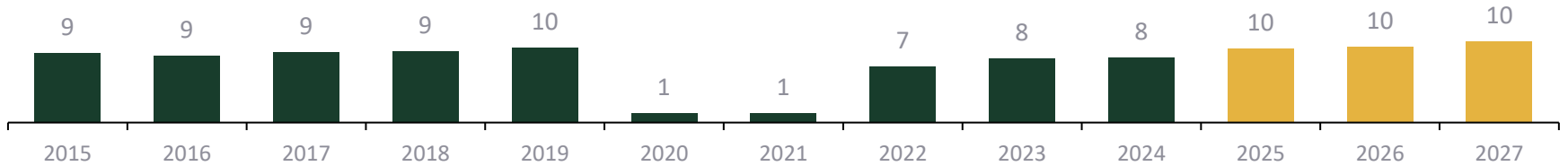
Spending

2.7%

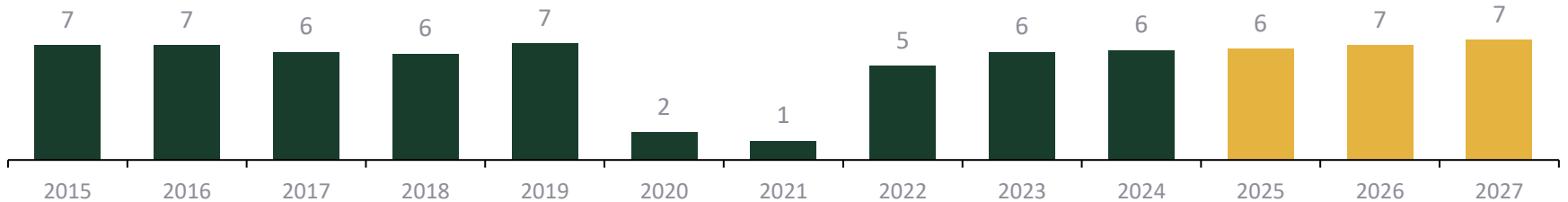
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



Historic Forecast

Visitor Perceptions | The American South

United Kingdom

74%

Familiarity

Intl Markets: 67%

78%

Appeal

Intl Markets: 75%

26%

Promotional Buzz

Intl Markets: 29%

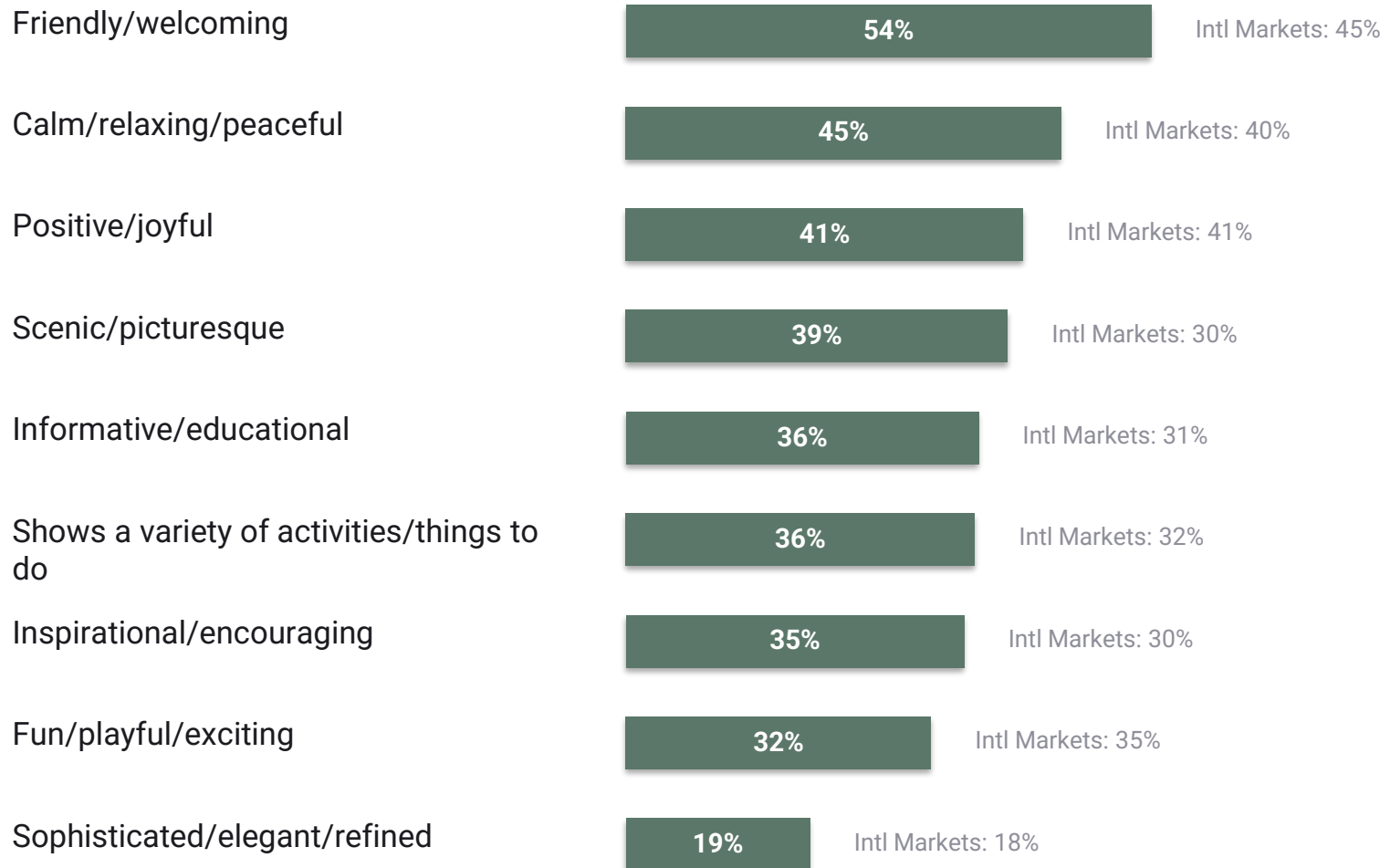
41%

Likely to Visit (5yr)

Intl Markets: 41%

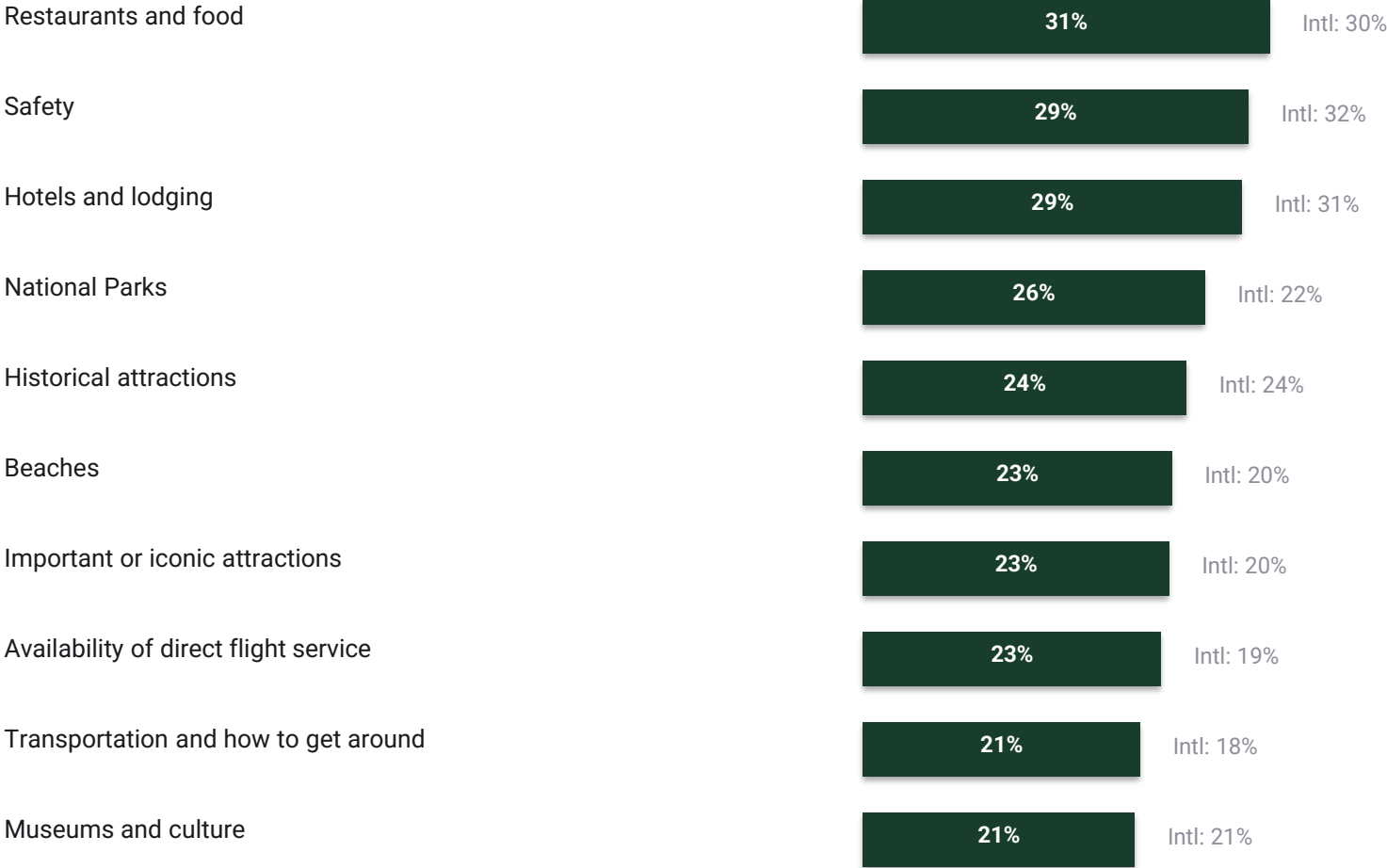
Desired Travel Promotion Tone

United Kingdom



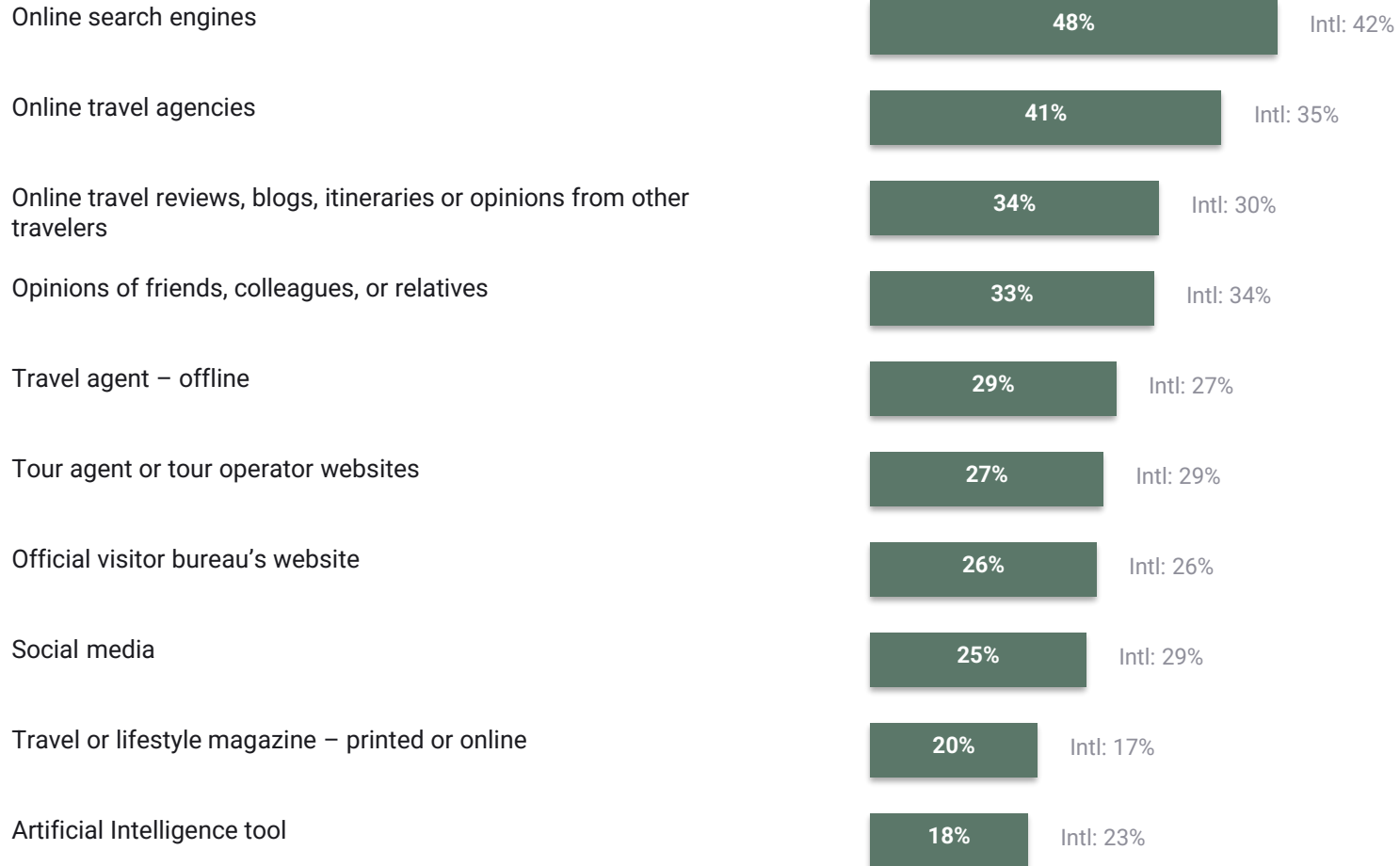
Top Information Sources

United Kingdom



Planning Resources

United Kingdom



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

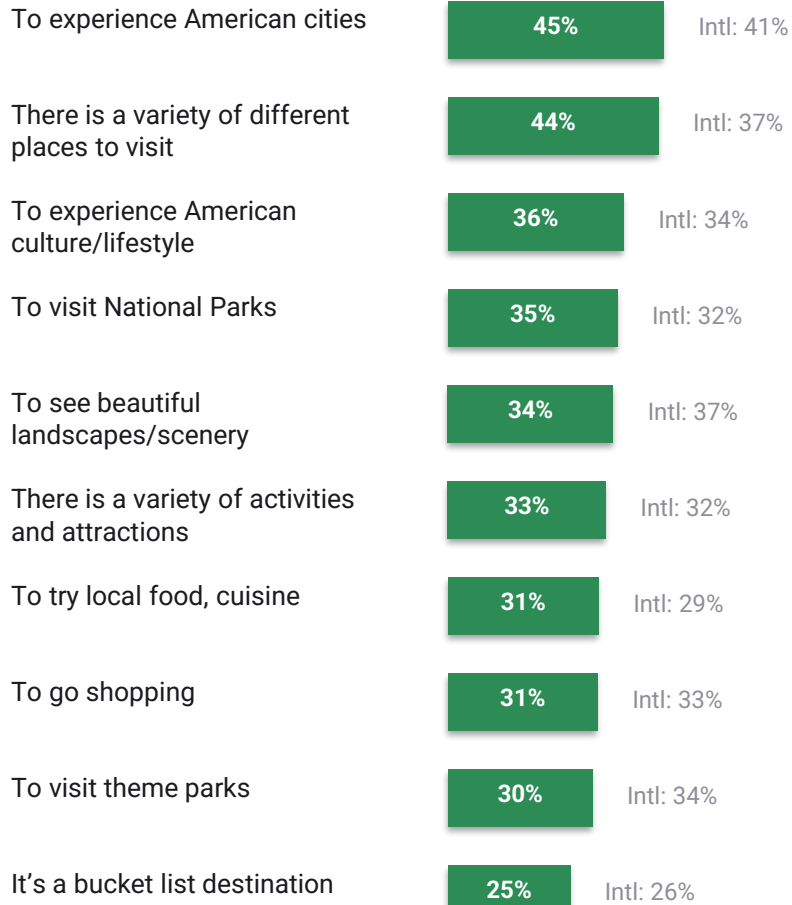
Total

Intl: \$5,049

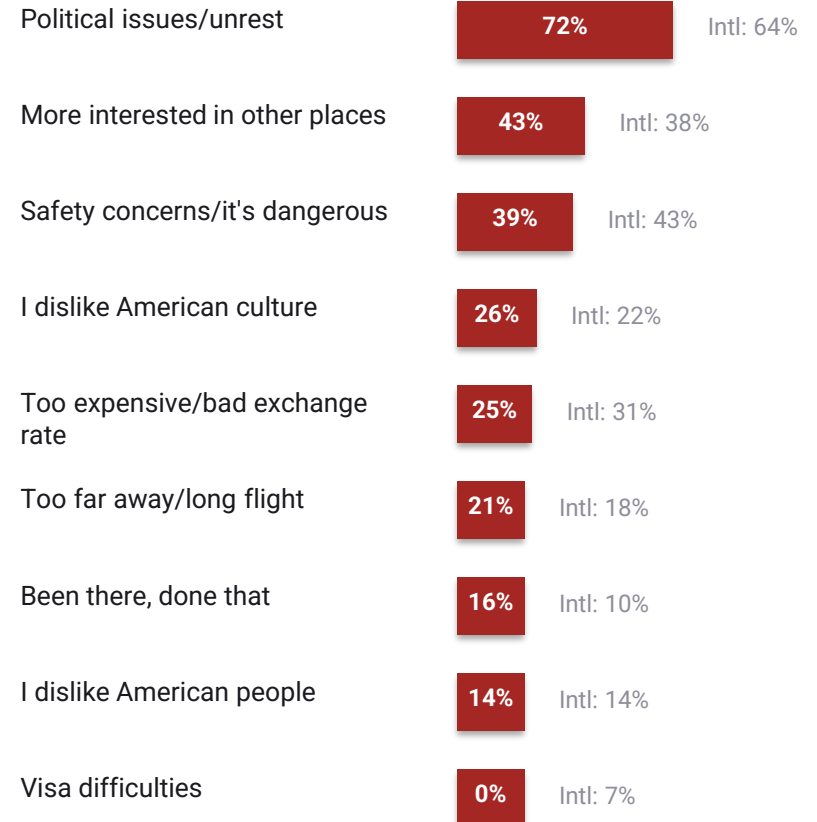
Enablers & Barriers to Visiting

United Kingdom

Enablers

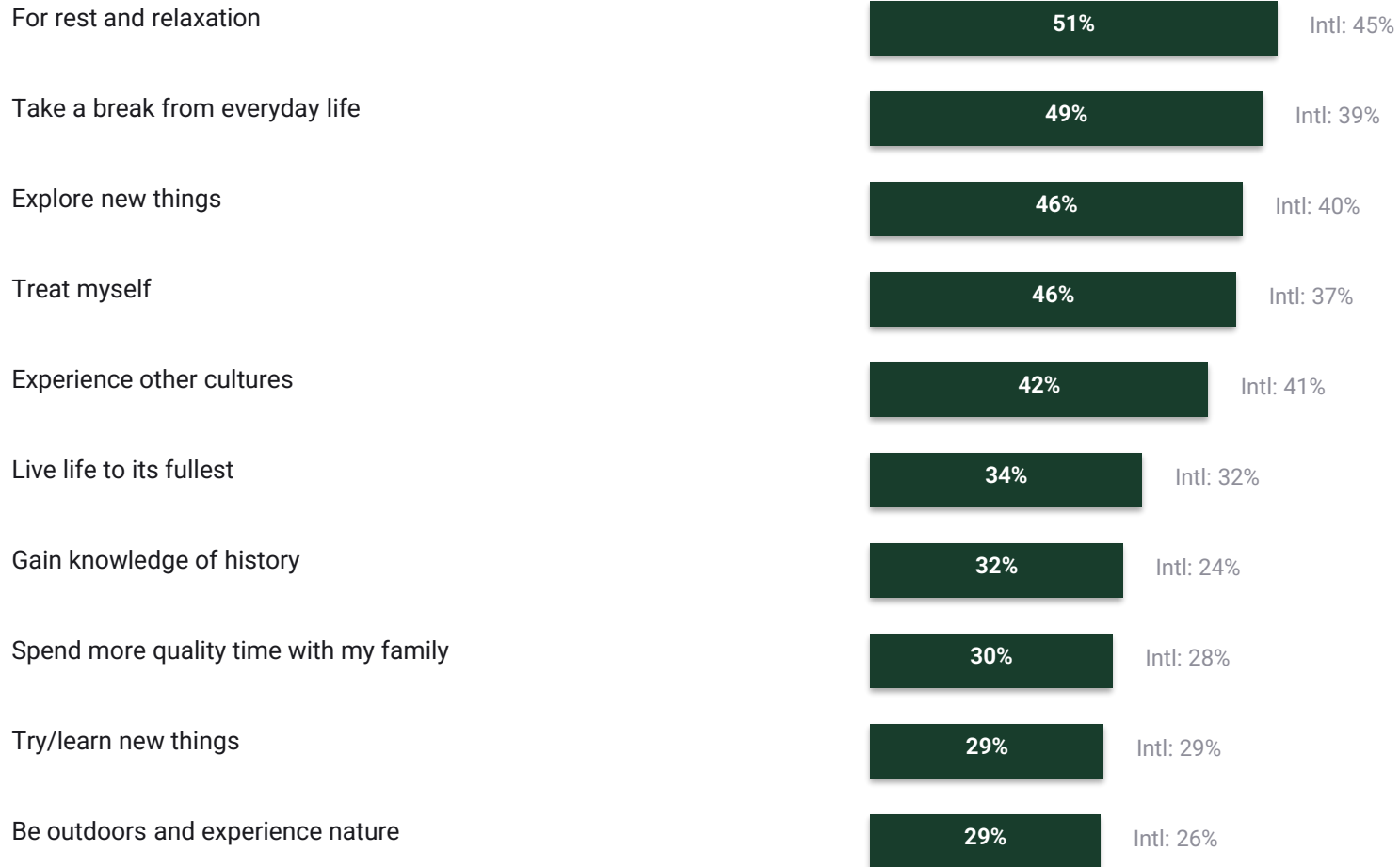


Barriers



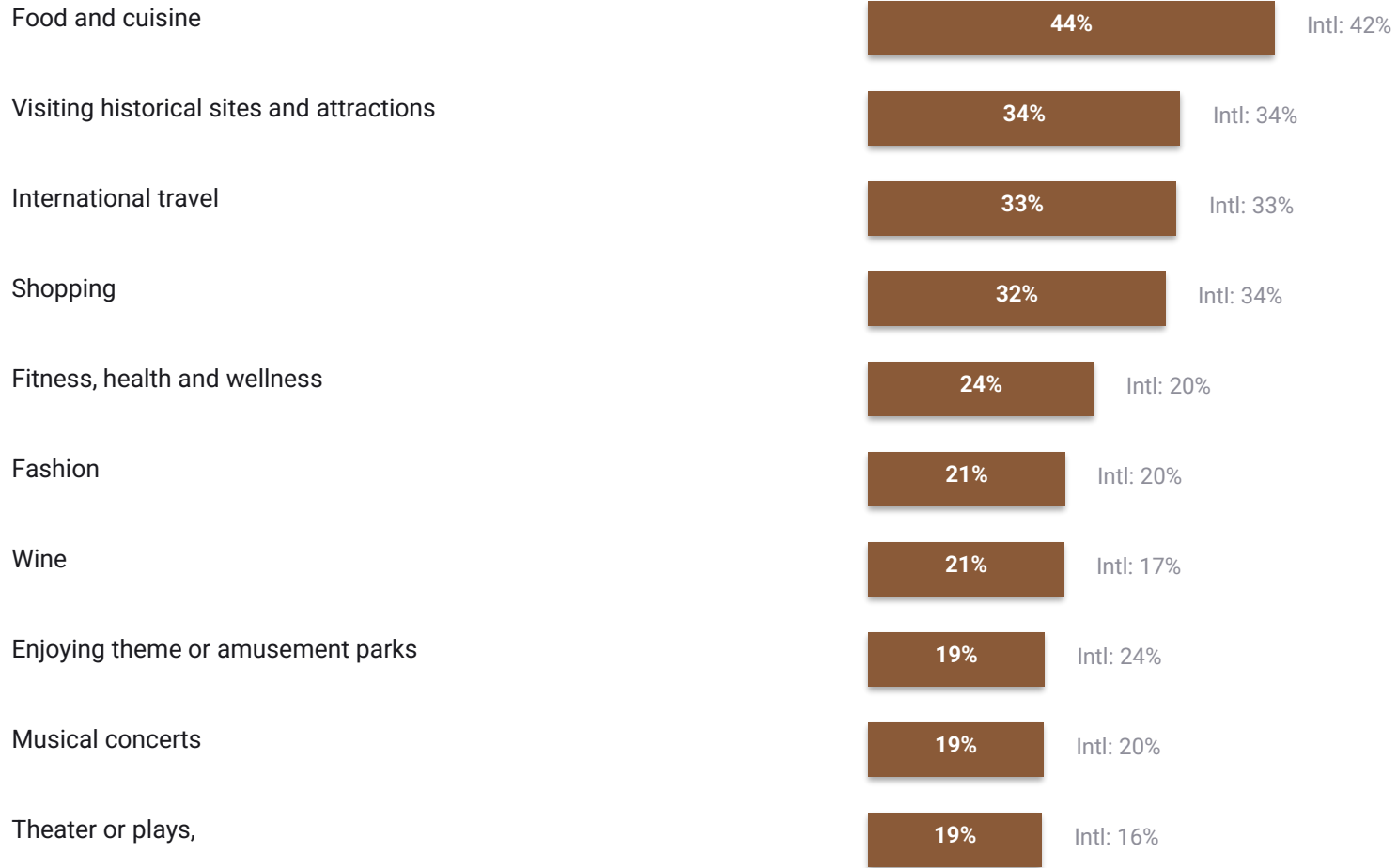
Travel Motivations

United Kingdom



Hobbies & Passions

United Kingdom



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

INDIA

Source Market Analysis | Arkansas

#2 by Spending | #4 by Visits



TravelSouth
All Y'all Are Welcome USA

India | Key Findings

- 1 2026 Arkansas projected spending:** \$8.7M (+6.1% YOY). Projected visitors: 5.1K (0% YOY). Ranks #2 by spending and #4 by visits among Arkansas source markets.
- 2 Macro Context:** India 2026 GDP growth projected at 6.2%. Exchange rate: 90.92 INR/USD.
- 3 CAGR Comparison:** 2023-2027 projected spending CAGR (10.5%) exceeds 2015-2019 (6%).
- 4 Visitor Perceptions:** 90% familiarity with the American South, 90% appeal, 74% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$6,617 for a 2-week trip. Average length of stay: 15.4 days. Average destinations: 7.7.
- 6 Top Motivation:** Explore new things (49%)
- 7 Top Enabler:** To experience American cities (52%)
- 8 Preferred Tone:** Positive/joyful (59%)
- 9 Top Barrier:** Political issues/unrest (66%)

India

\$8.7M

2026 Arkansas Spending

+6.1% YOY vs. 2025

5.1K

2026 Arkansas Visitors

0% YOY vs. 2025

\$7.1B

2026 USA Spending

+5.7% YOY vs. 2025

3.3M

2026 USA Visitors

+2.3% YOY vs. 2025

\$8.2M

2025 Arkansas Spending

-4.7% YOY vs. 2024

5.1K

2025 Arkansas Visitors

-3.8% YOY vs. 2024

\$6.8B

2025 USA Spending

-2.9% YOY vs. 2024

3.2M

2025 USA Visitors

-3.7% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

6%

Spending

6.7%

Visits

2023-2027 PROJECTED CAGR

10.5%

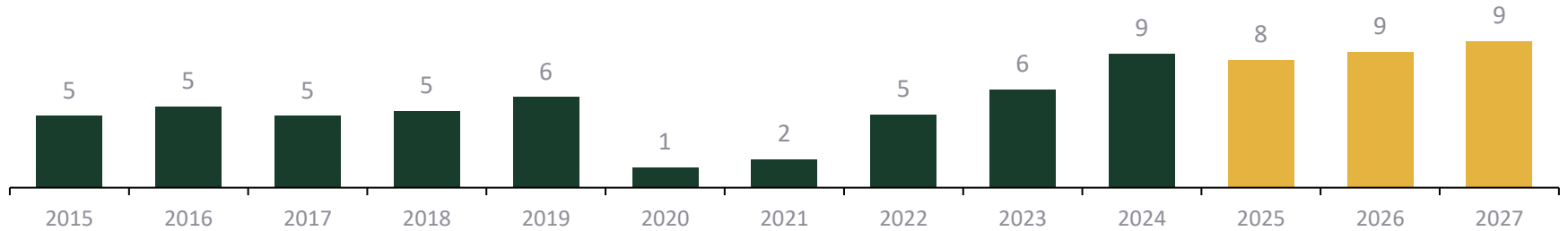
Spending

6.6%

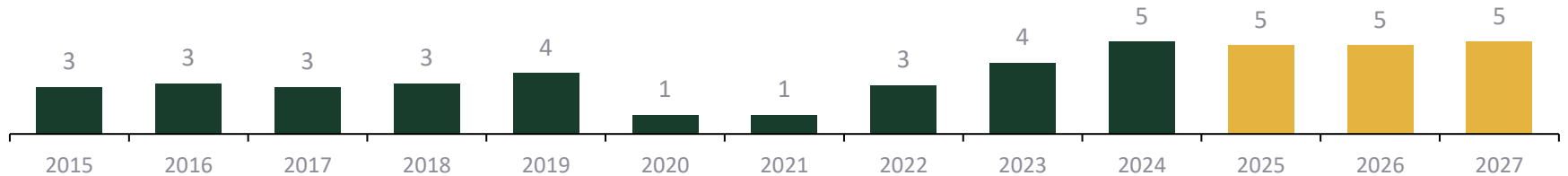
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



Historic Forecast

Visitor Perceptions | The American South

India

90%

Familiarity

Intl Markets: 67%

90%

Appeal

Intl Markets: 75%

62%

Promotional Buzz

Intl Markets: 29%

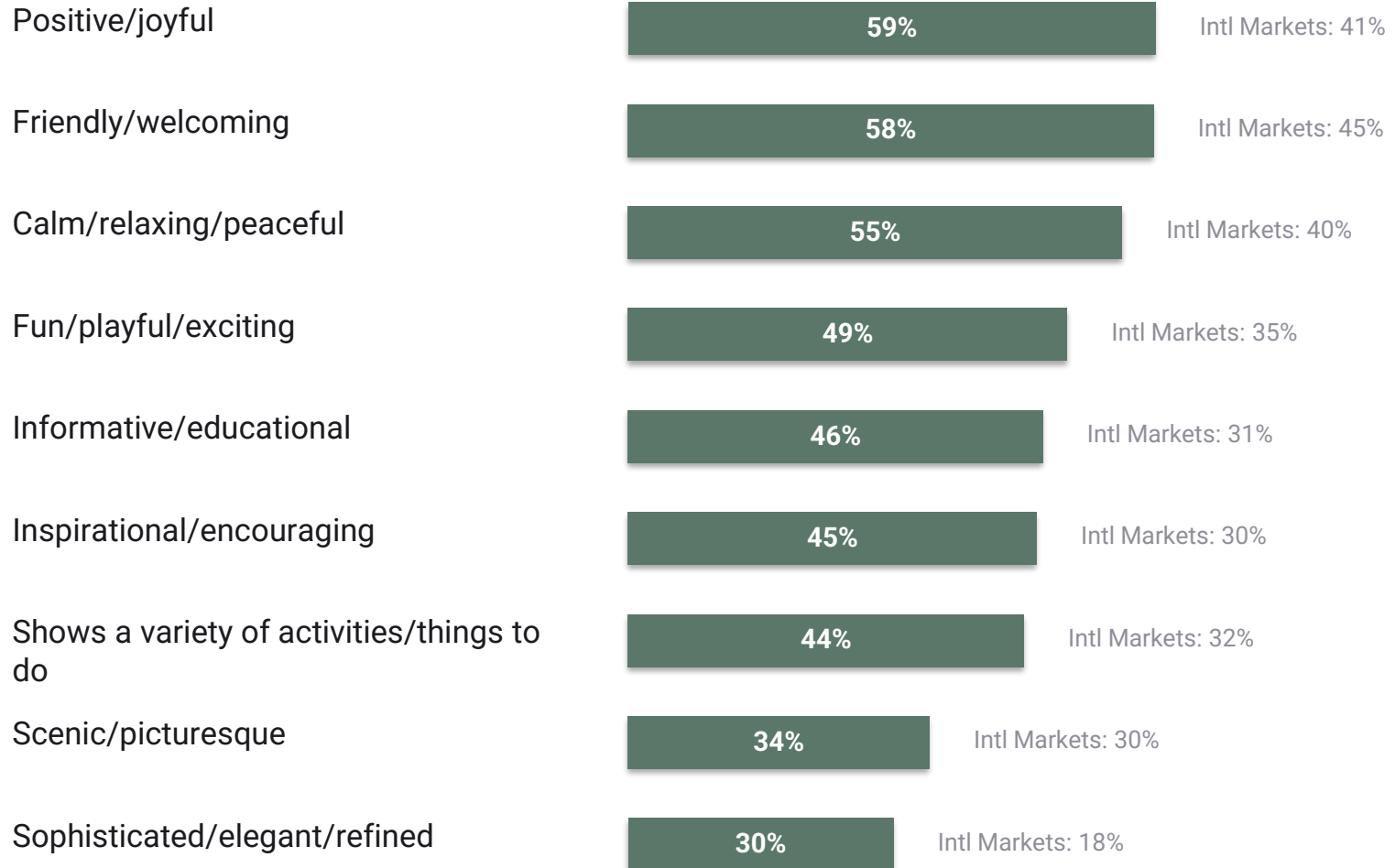
74%

Likely to Visit (5yr)

Intl Markets: 41%

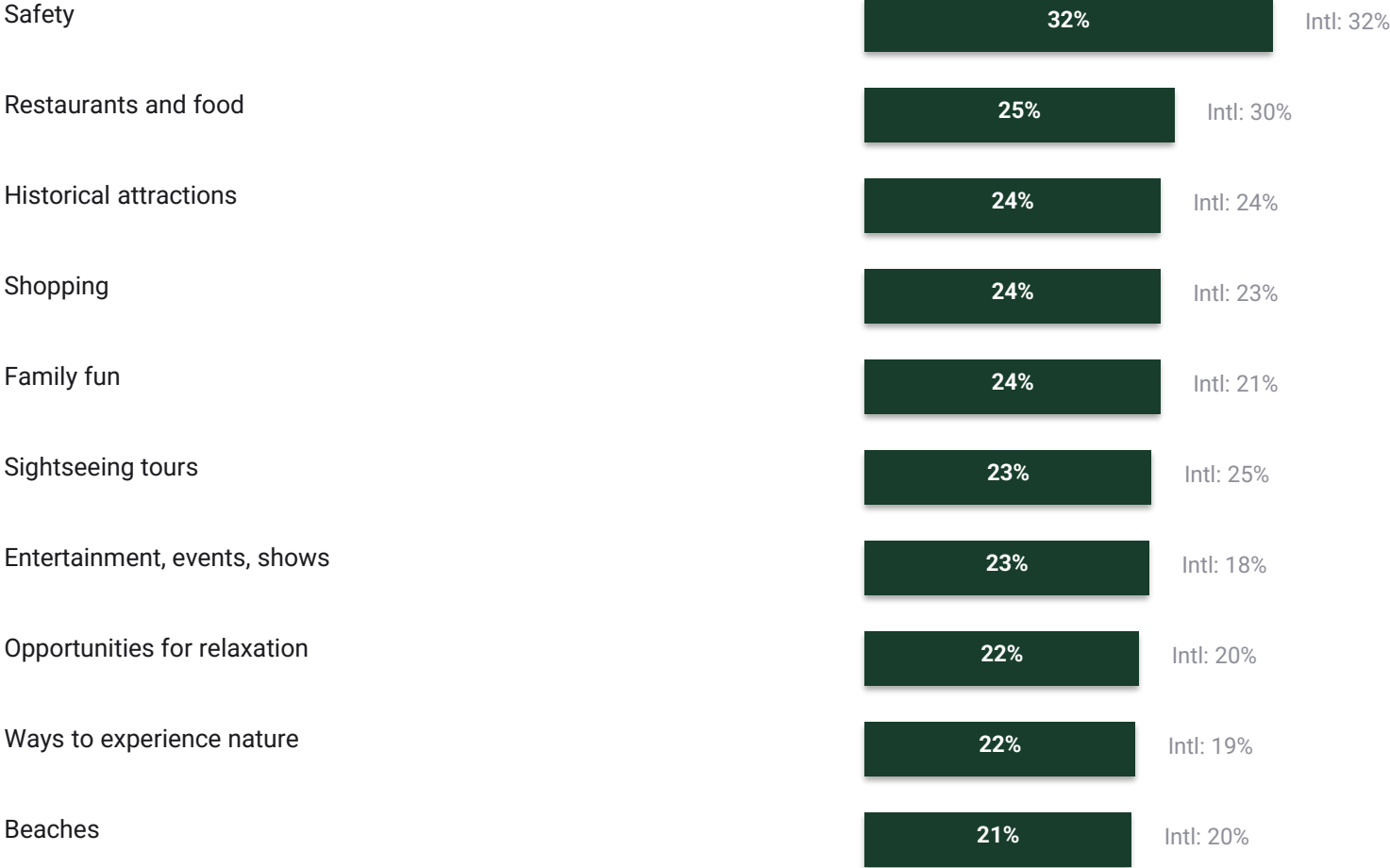
Desired Travel Promotion Tone

India



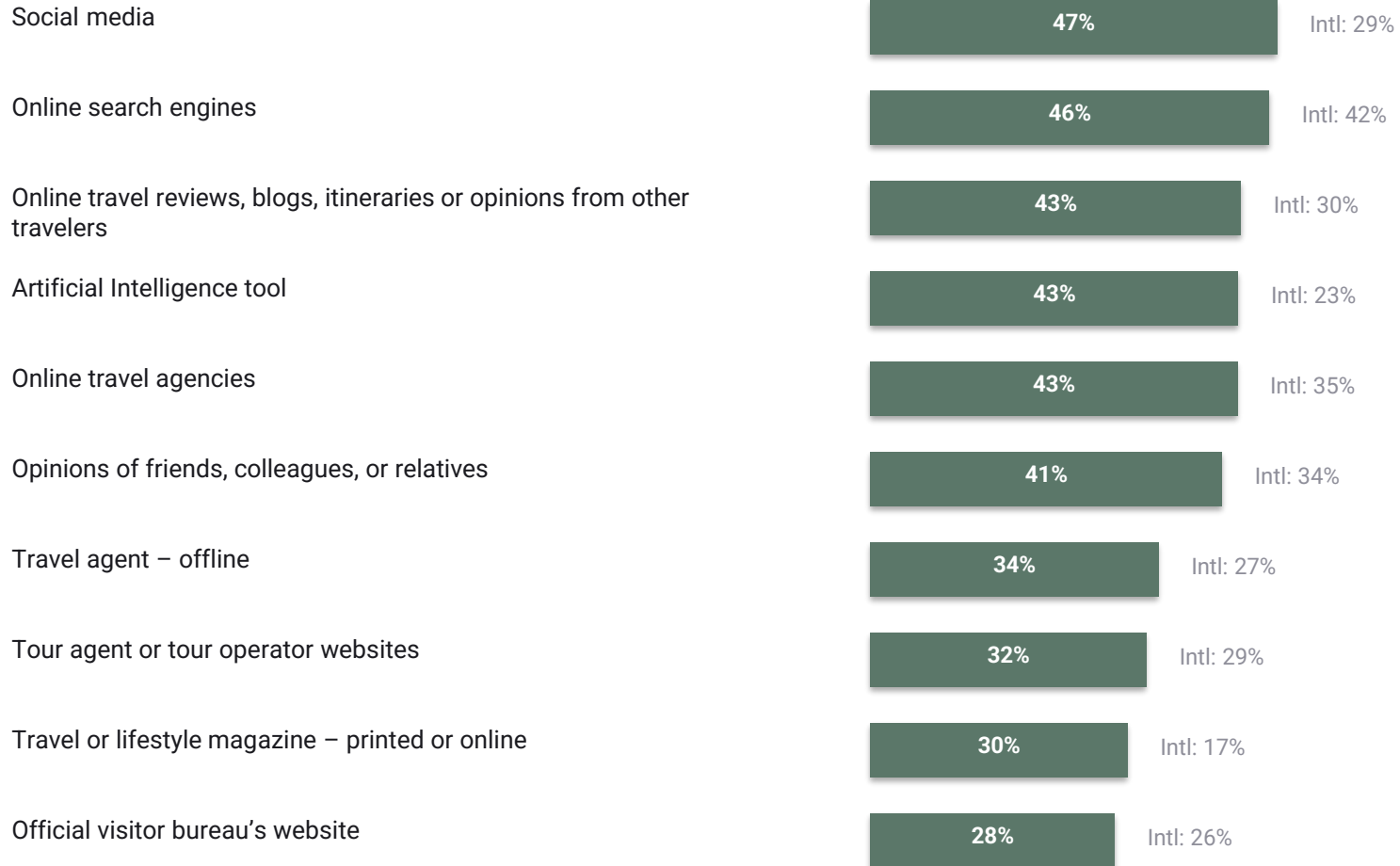
Top Information Sources

India



Planning Resources

India



U.S. Travel Planning & Budget

India

U.S. Trip Planning

66%

Likely to Visit US (2yr)

Intl Markets: 36%

11 wks

Planning Window

Intl Markets: 14 wks

10 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

15.4

Avg Days in the U.S.

Intl Markets: 12.3

7.7

Avg Destinations in the U.S.

Intl Markets: 4.4

5.7

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,727

Hotels

Intl: \$1,568

\$1,581

Shopping

Intl: \$1,001

\$971

Dining

Intl: \$826

\$1,021

Sightseeing

Intl: \$881

\$1,317

Transport

Intl: \$772

\$6,617

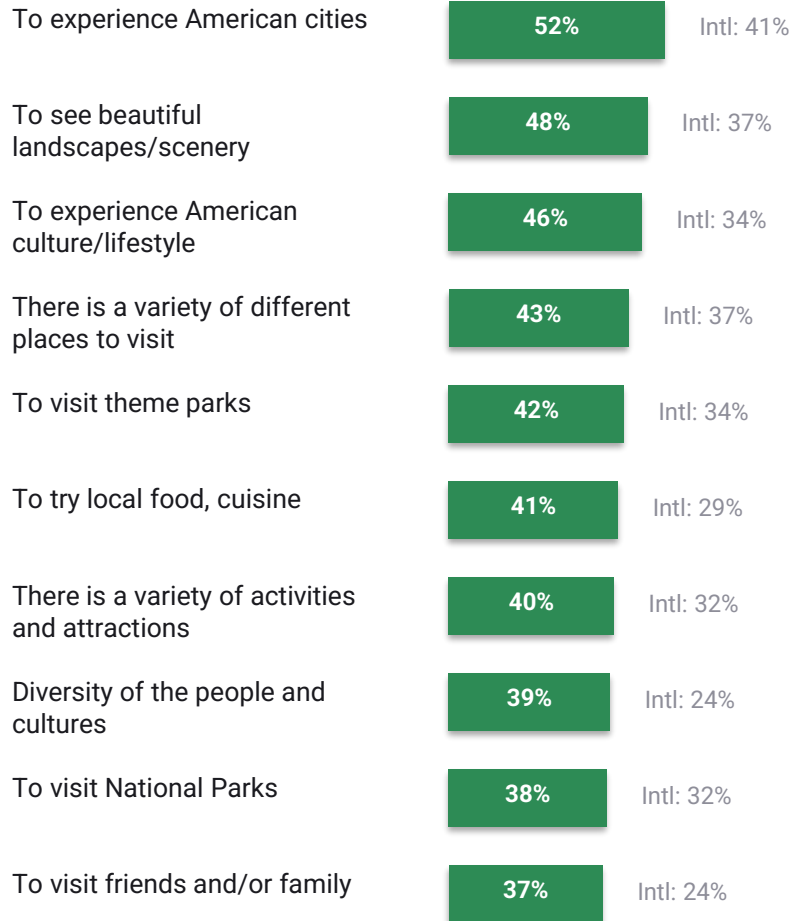
Total

Intl: \$5,049

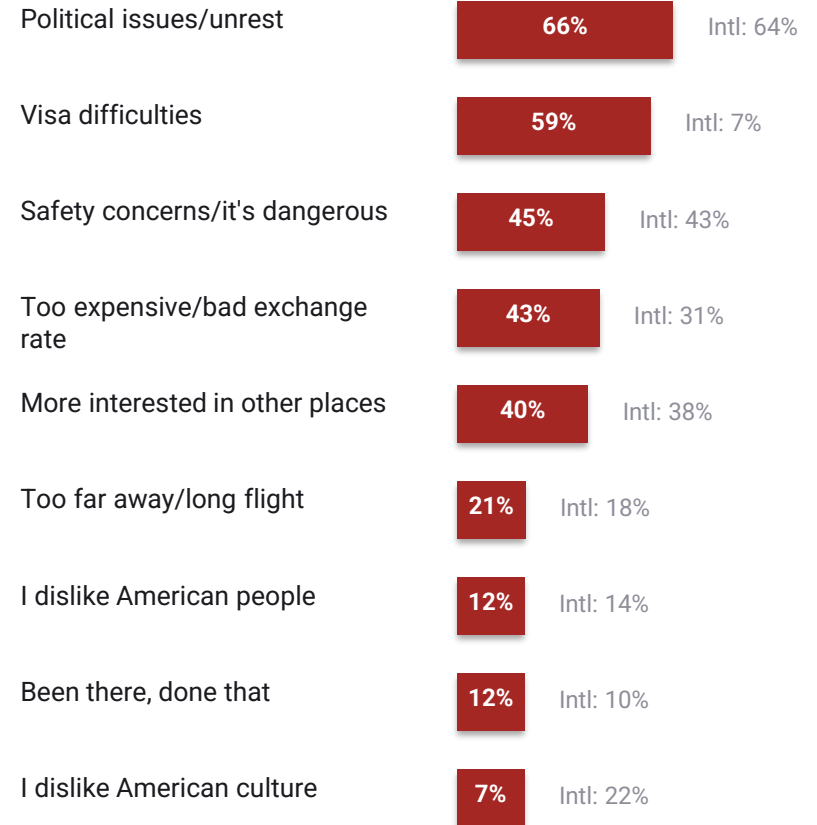
Enablers & Barriers to Visiting

India

Enablers

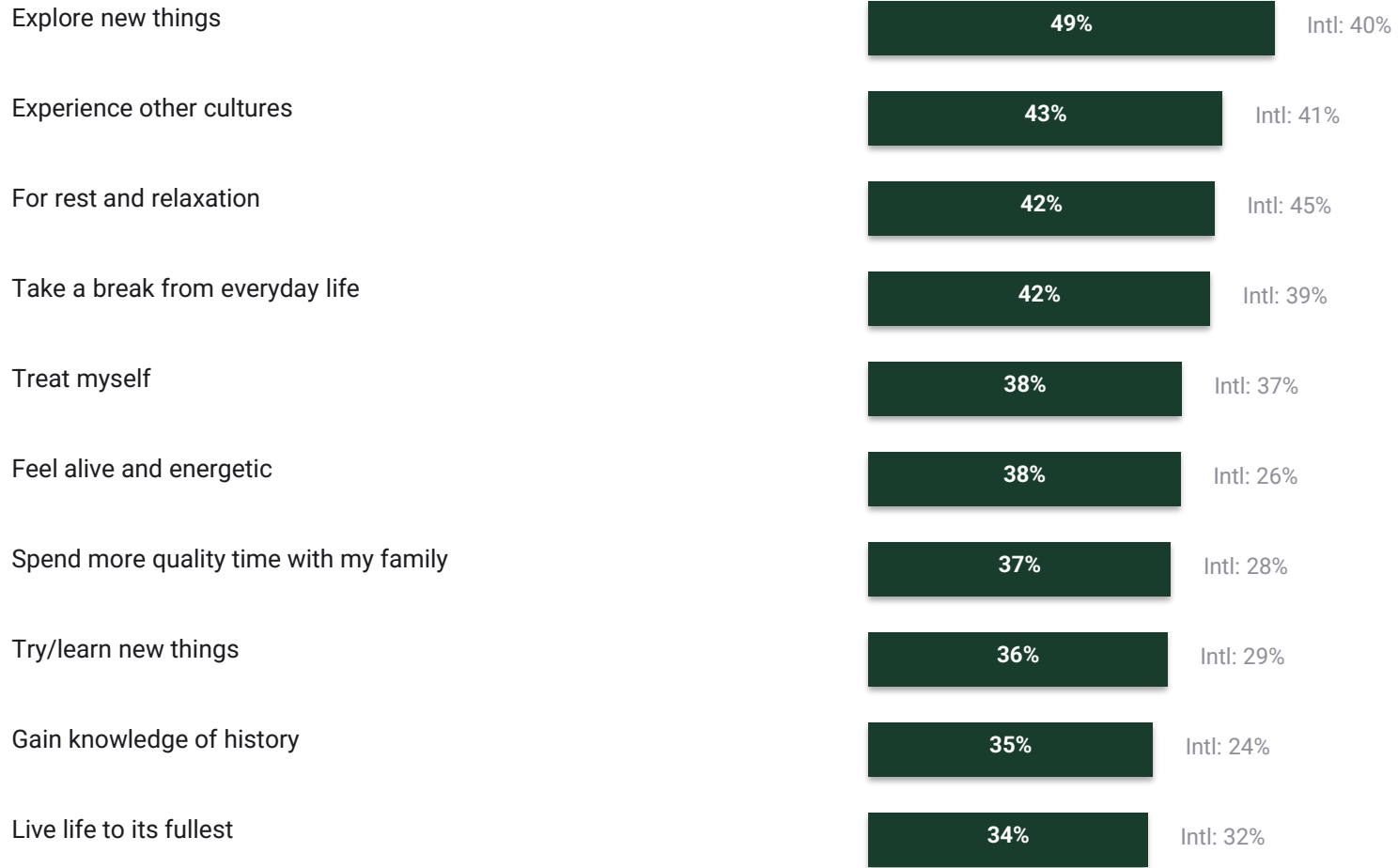


Barriers



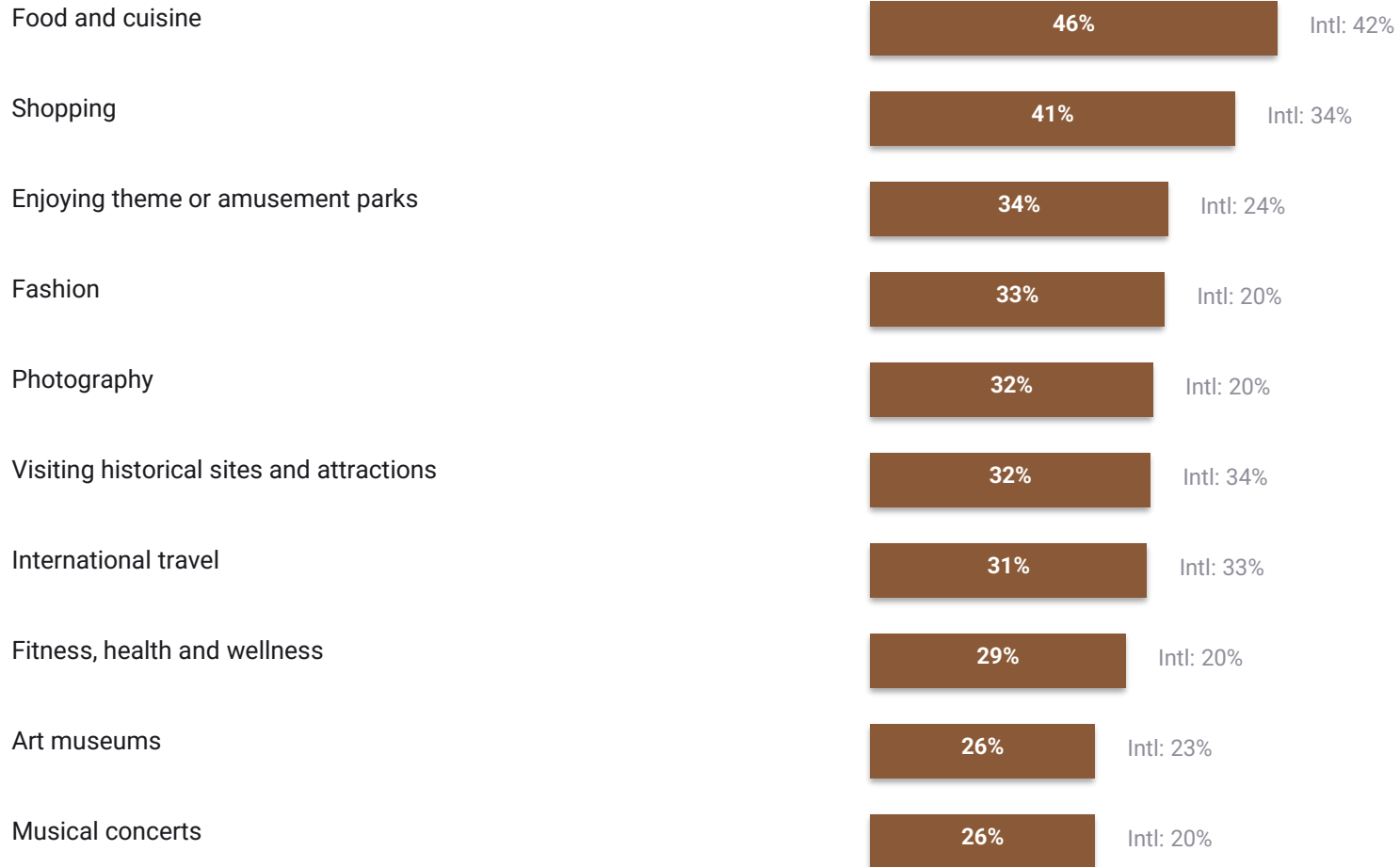
Travel Motivations

India



Hobbies & Passions

India



Travel Trends & Outlook

India

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

68%



Intl: 43%

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

67%



Intl: 42%

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

66%



Intl: 44%

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

64%



Intl: 54%

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

64%



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%

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

54%



Intl: 34%

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

53%



Intl: 27%

India

Intl Markets

CANADA

Source Market Analysis | Arkansas

#3 by Spending | #2 by Visits



TravelSouth
All Y'all Are Welcome USA

Canada | Key Findings

- 1 2026 Arkansas projected spending:** \$8M (+6.7% YOY). Projected visitors: 19.1K (+5.5% YOY). Ranks #3 by spending and #2 by visits among Arkansas 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 (0.3%) exceeds 2015-2019 (-5.4%).
- 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%)

Canada

\$8M

2026 Arkansas Spending

+6.7% YOY vs. 2025

19.1K

2026 Arkansas Visitors

+5.5% YOY vs. 2025

\$16.4B

2026 USA Spending

+7.6% YOY vs. 2025

20.9M

2026 USA Visitors

+6.6% YOY vs. 2025

\$7.5M

2025 Arkansas Spending

-21.9% YOY vs. 2024

18.1K

2025 Arkansas Visitors

-21.3% YOY vs. 2024

\$15.2B

2025 USA Spending

-21.5% YOY vs. 2024

19.6M

2025 USA Visitors

-23.1% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

-5.4%

Spending

0%

Visits

2023-2027 PROJECTED CAGR

0.3%

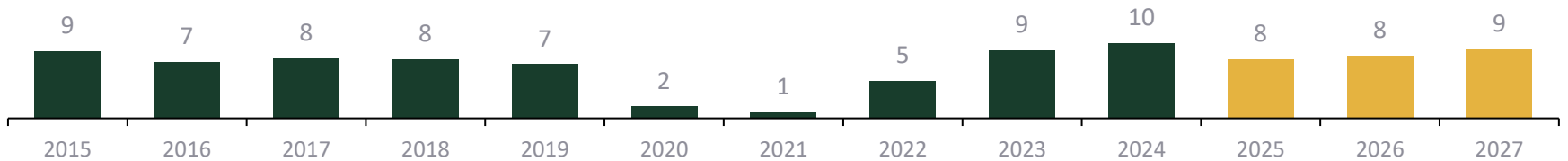
Spending

-3.3%

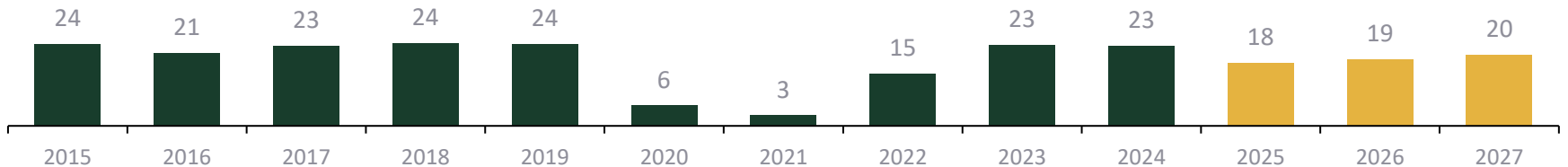
Visits

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%

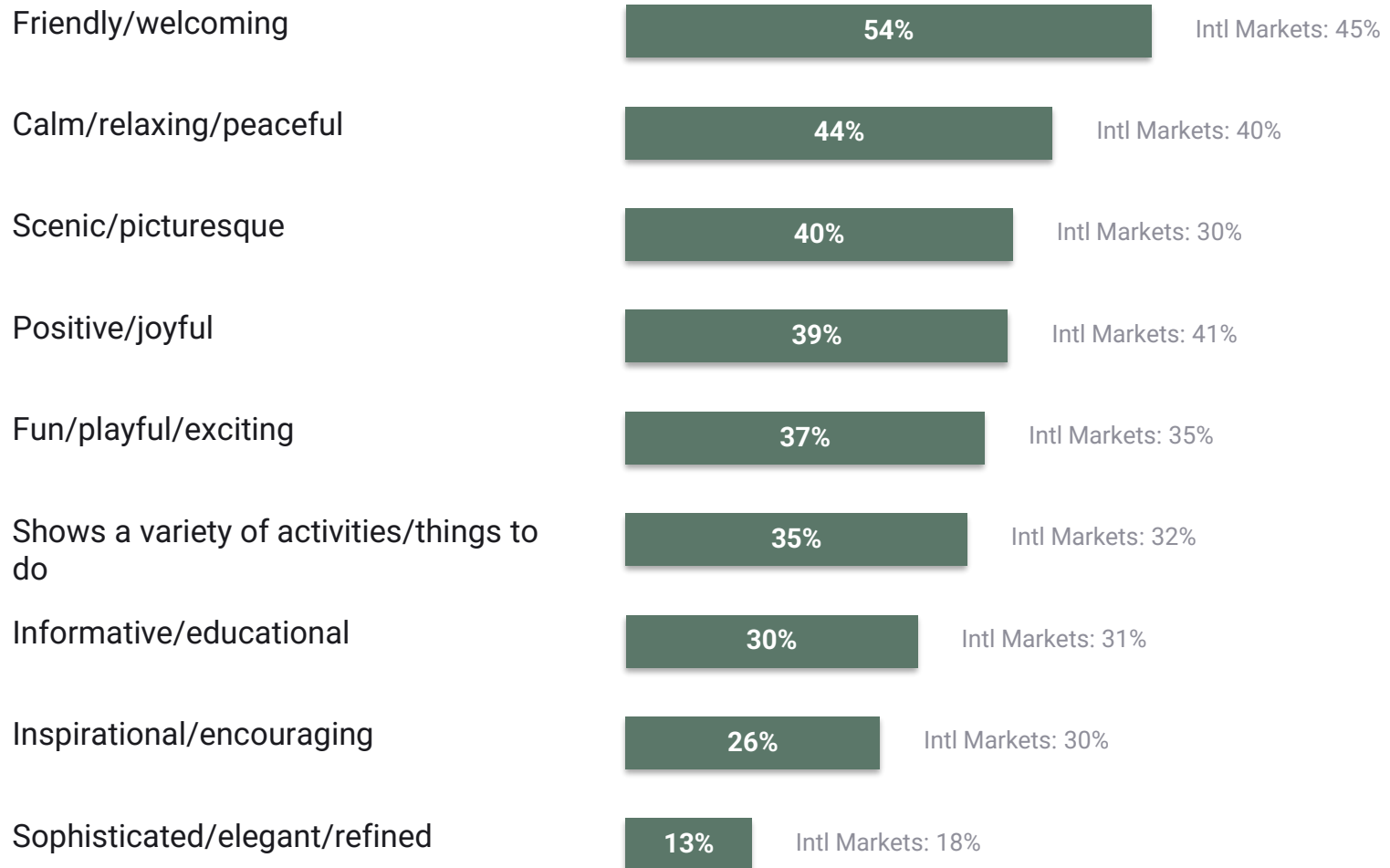
38%

Likely to Visit (5yr)

Intl Markets: 41%

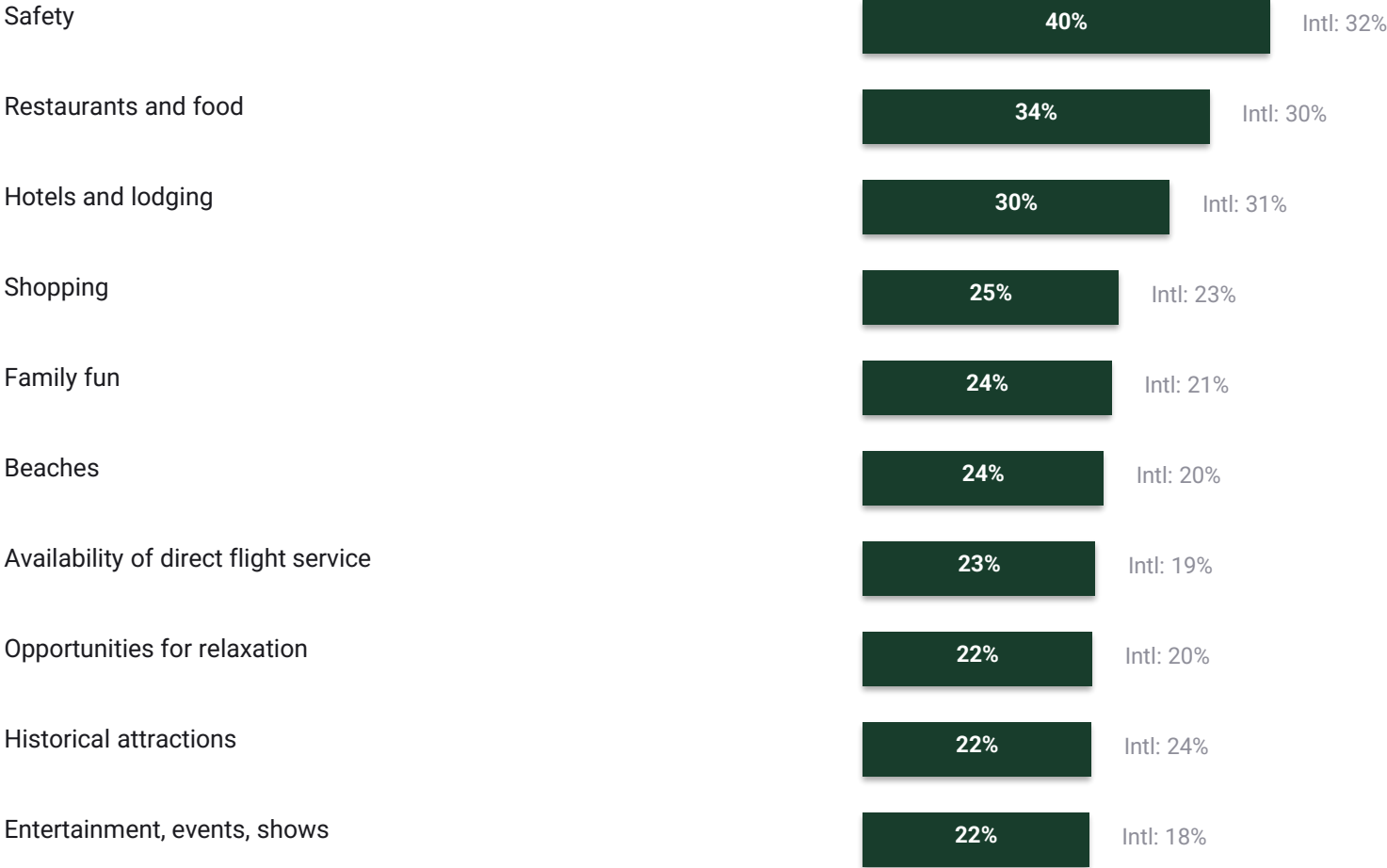
Desired Travel Promotion Tone

Canada



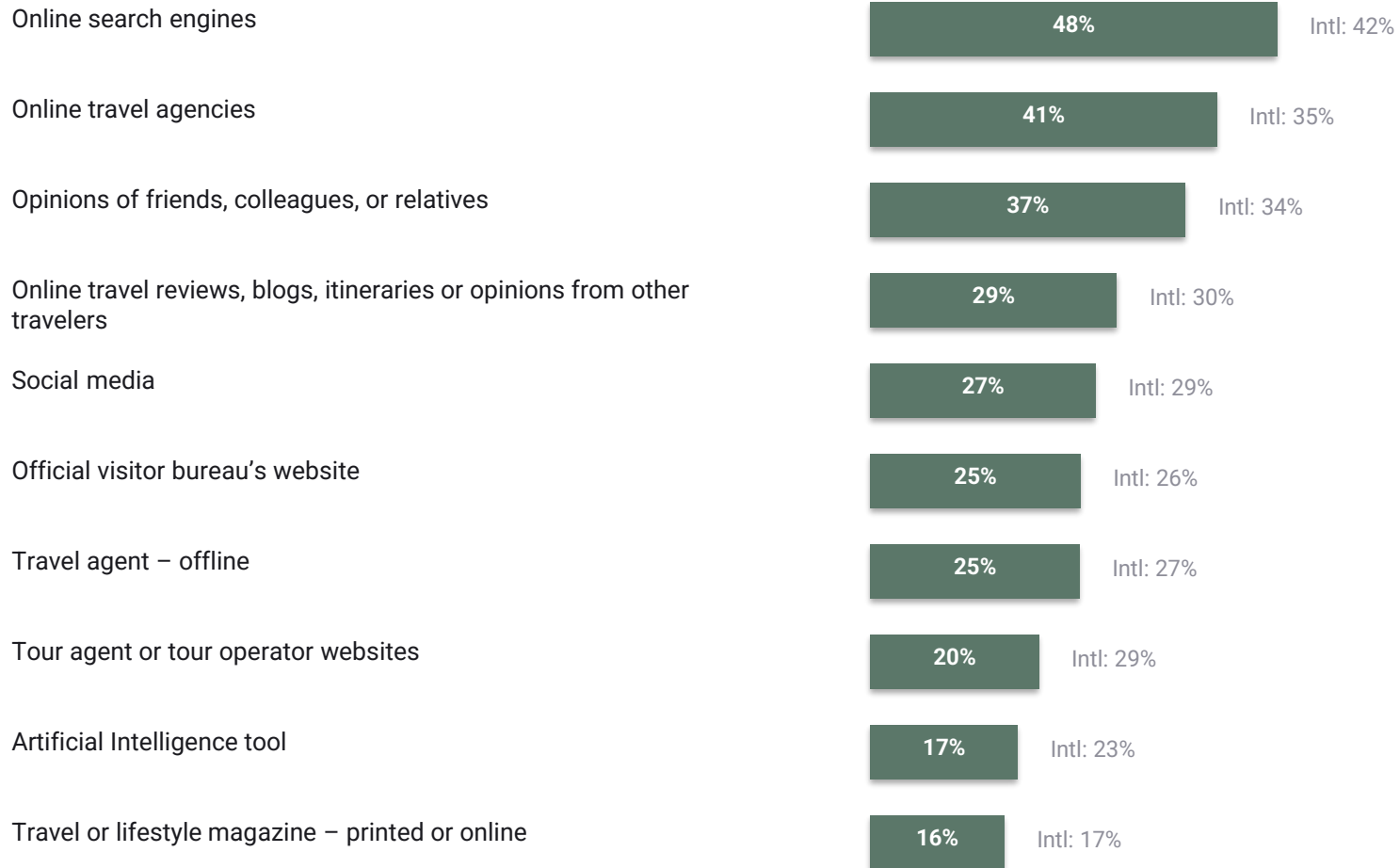
Top Information Sources

Canada



Planning Resources

Canada



U.S. Travel Planning & Budget

Canada

U.S. Trip Planning

36%

Likely to Visit US (2yr)

Intl Markets: 36%

12 wks

Planning Window

Intl Markets: 14 wks

11 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

8.4

Avg Days in the U.S.

Intl Markets: 12.3

2.8

Avg Destinations in the U.S.

Intl Markets: 4.4

2.1

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,095

Hotels

Intl: \$1,568

\$481

Shopping

Intl: \$1,001

\$510

Dining

Intl: \$826

\$383

Sightseeing

Intl: \$881

\$480

Transport

Intl: \$772

\$2,949

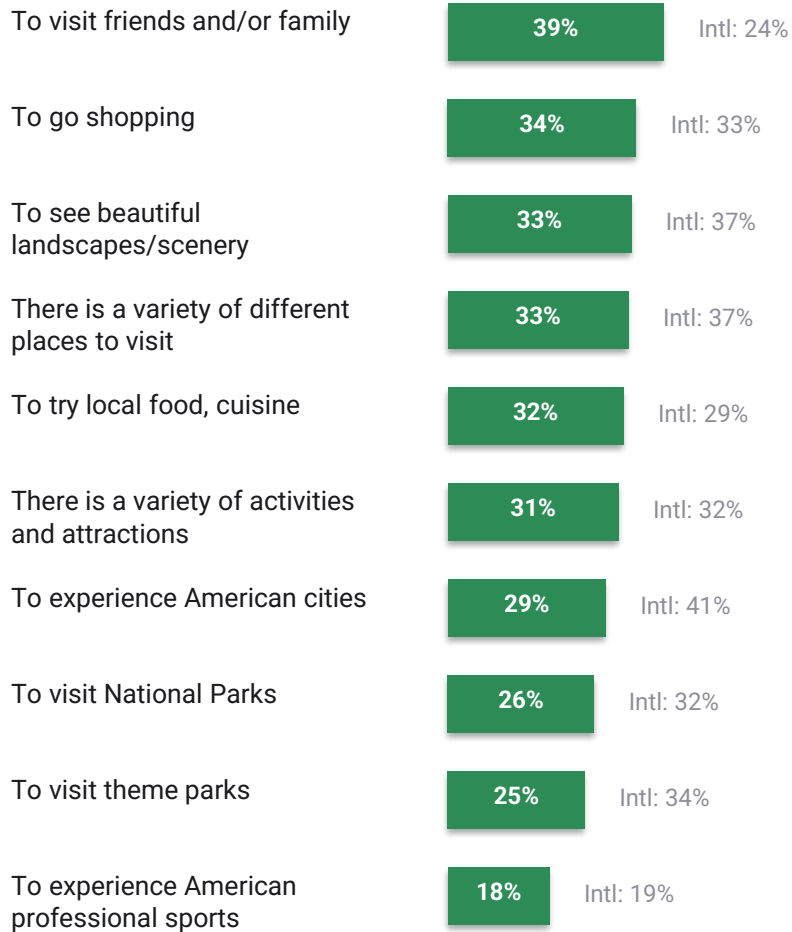
Total

Intl: \$5,049

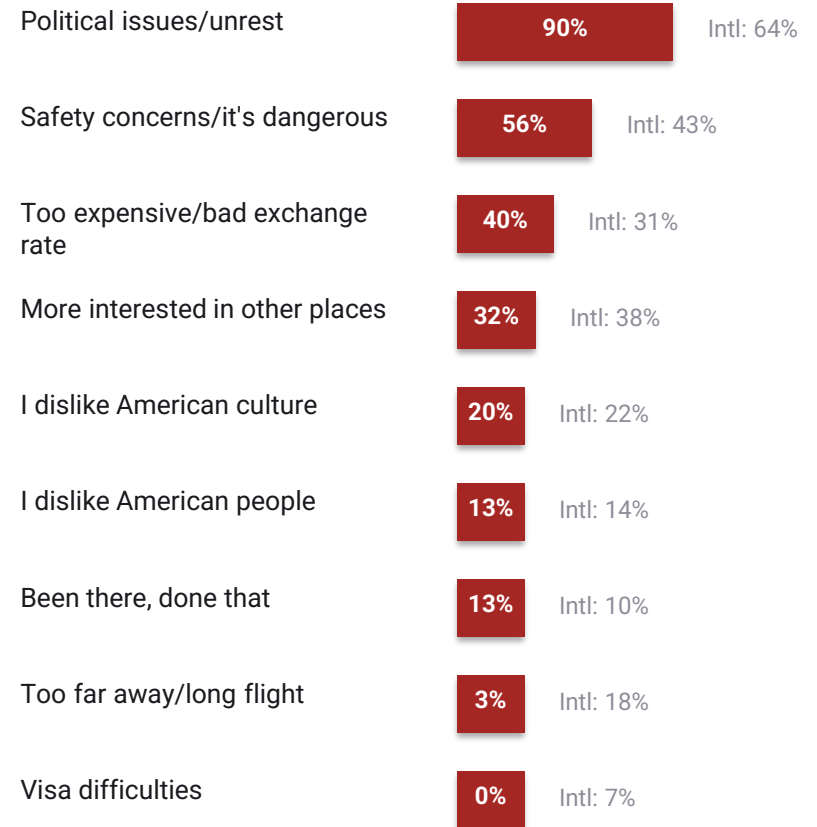
Enablers & Barriers to Visiting

Canada

Enablers

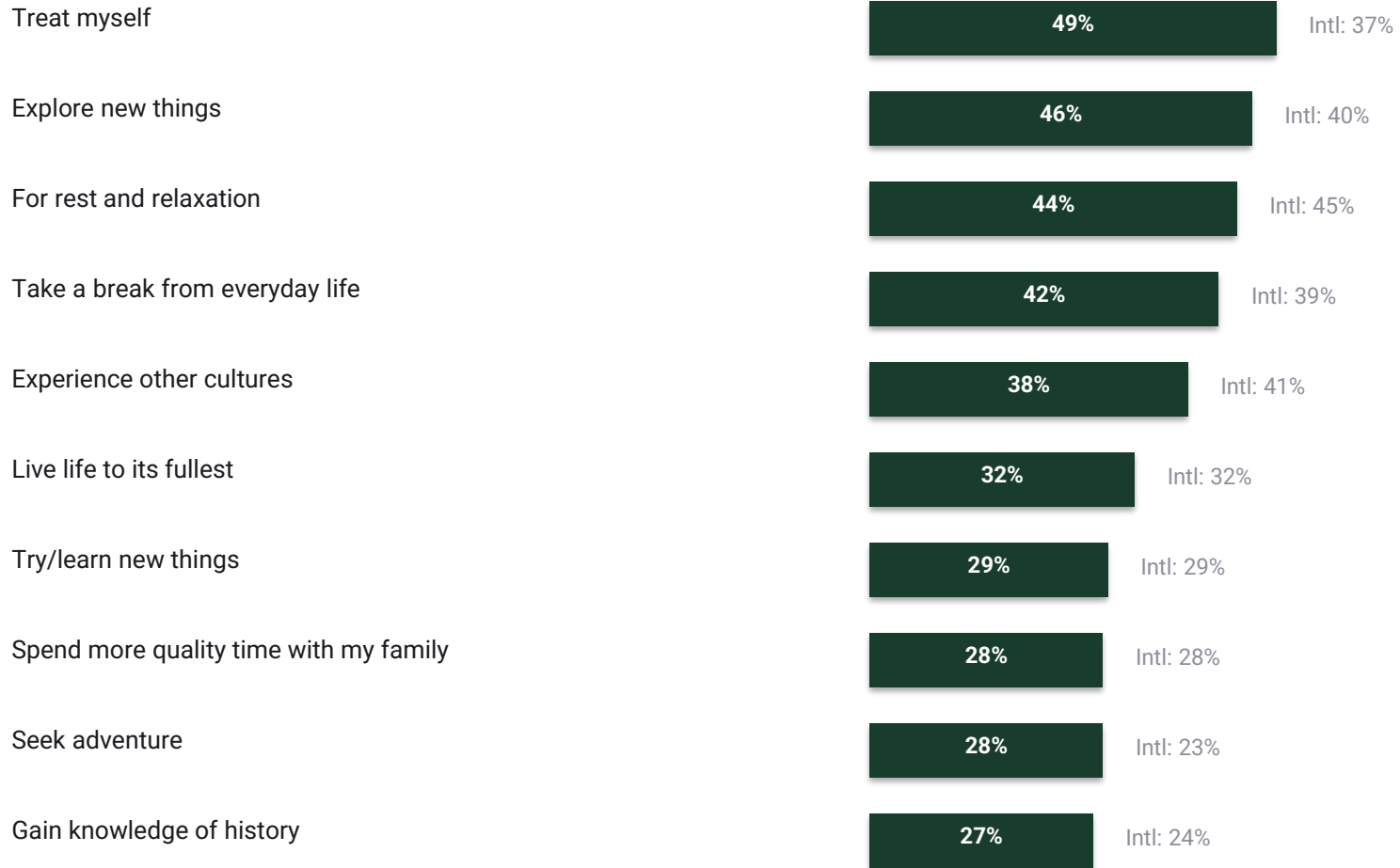


Barriers



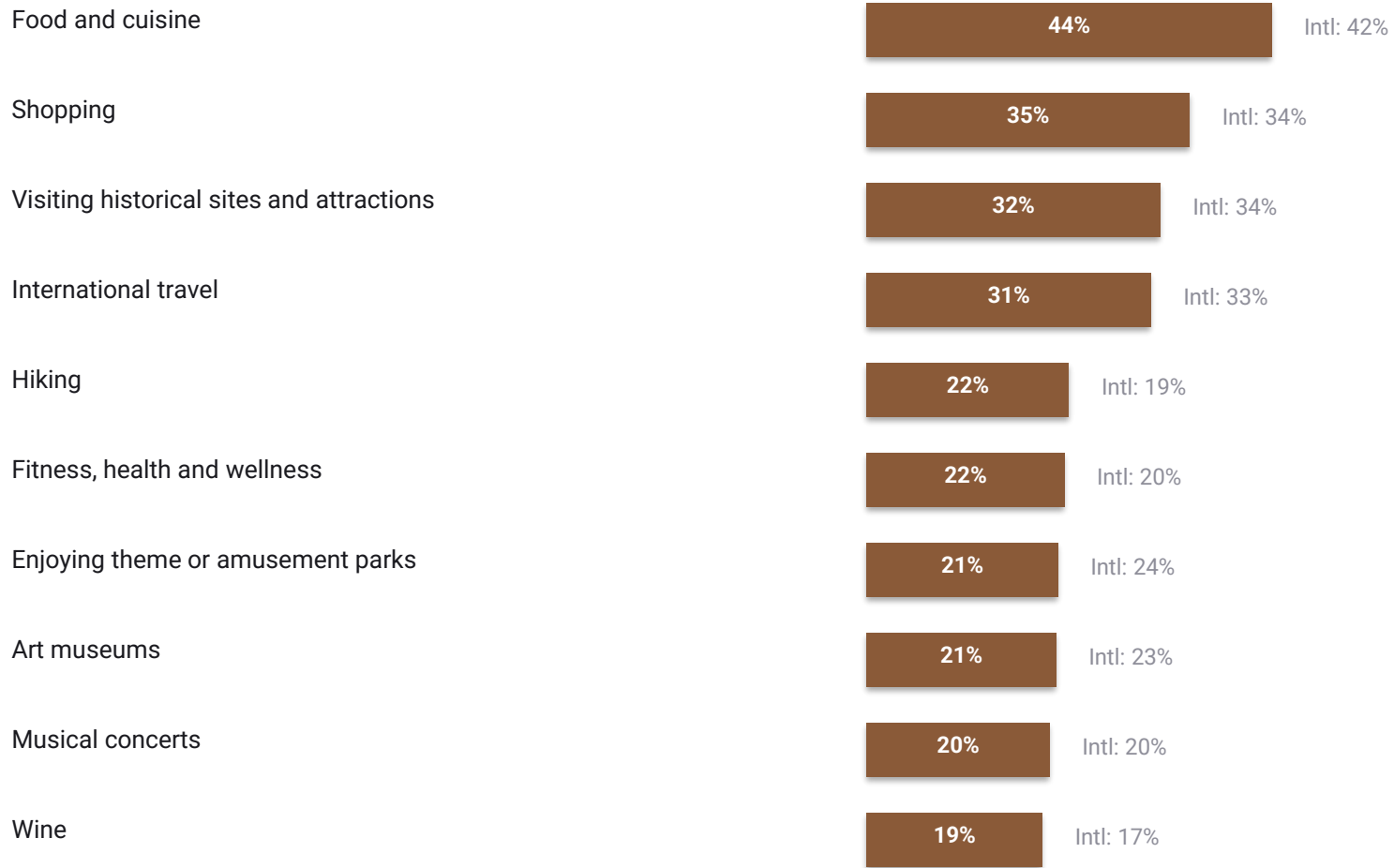
Travel Motivations

Canada



Hobbies & Passions

Canada



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

BRAZIL

Source Market Analysis | Arkansas

#4 by Spending | #6 by Visits



TravelSouth
All Y'all Are Welcome USA

Brazil | Key Findings

- 1 2026 Arkansas projected spending:** \$7.5M (+8.7% YOY). Projected visitors: 2.9K (+3.6% YOY). Ranks #4 by spending and #6 by visits among Arkansas 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 (13.6%) exceeds 2015-2019 (-7.7%).
- 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%)

Brazil

\$7.5M

2026 Arkansas Spending

+8.7% YOY vs. 2025

2.9K

2026 Arkansas Visitors

+3.6% YOY vs. 2025

\$8.4B

2026 USA Spending

+7.2% YOY vs. 2025

3M

2026 USA Visitors

+3.8% YOY vs. 2025

\$6.9M

2025 Arkansas Spending

+15% YOY vs. 2024

2.8K

2025 Arkansas Visitors

0% 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

-7.7%

Spending

-10%

Visits

2023-2027 PROJECTED CAGR

13.6%

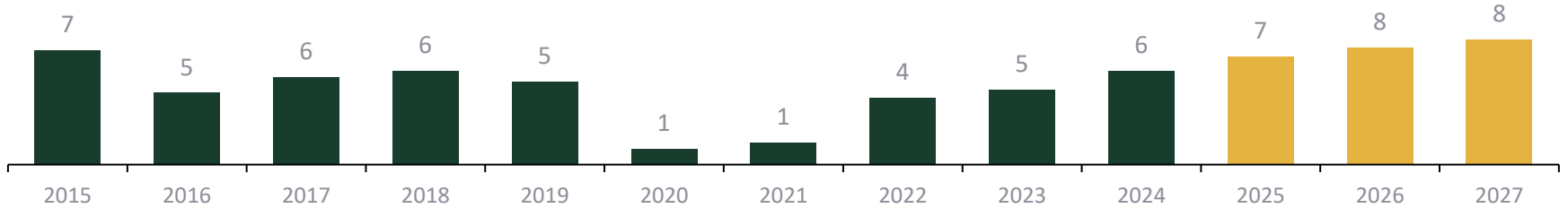
Spending

5.5%

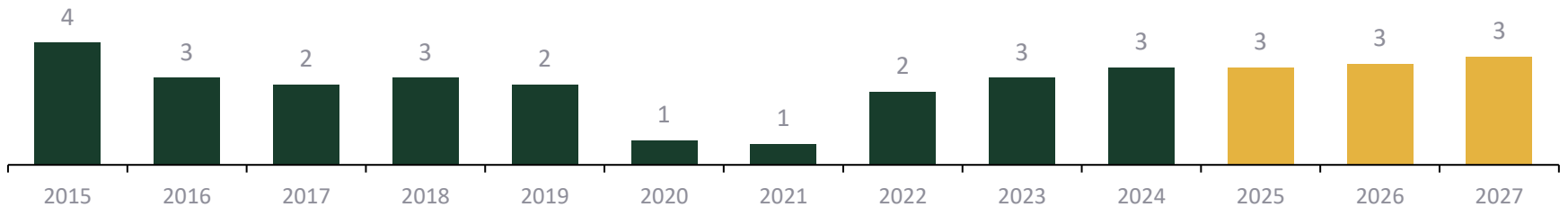
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

Brazil

72%

Familiarity

Intl Markets: 67%

82%

Appeal

Intl Markets: 75%

30%

Promotional Buzz

Intl Markets: 29%

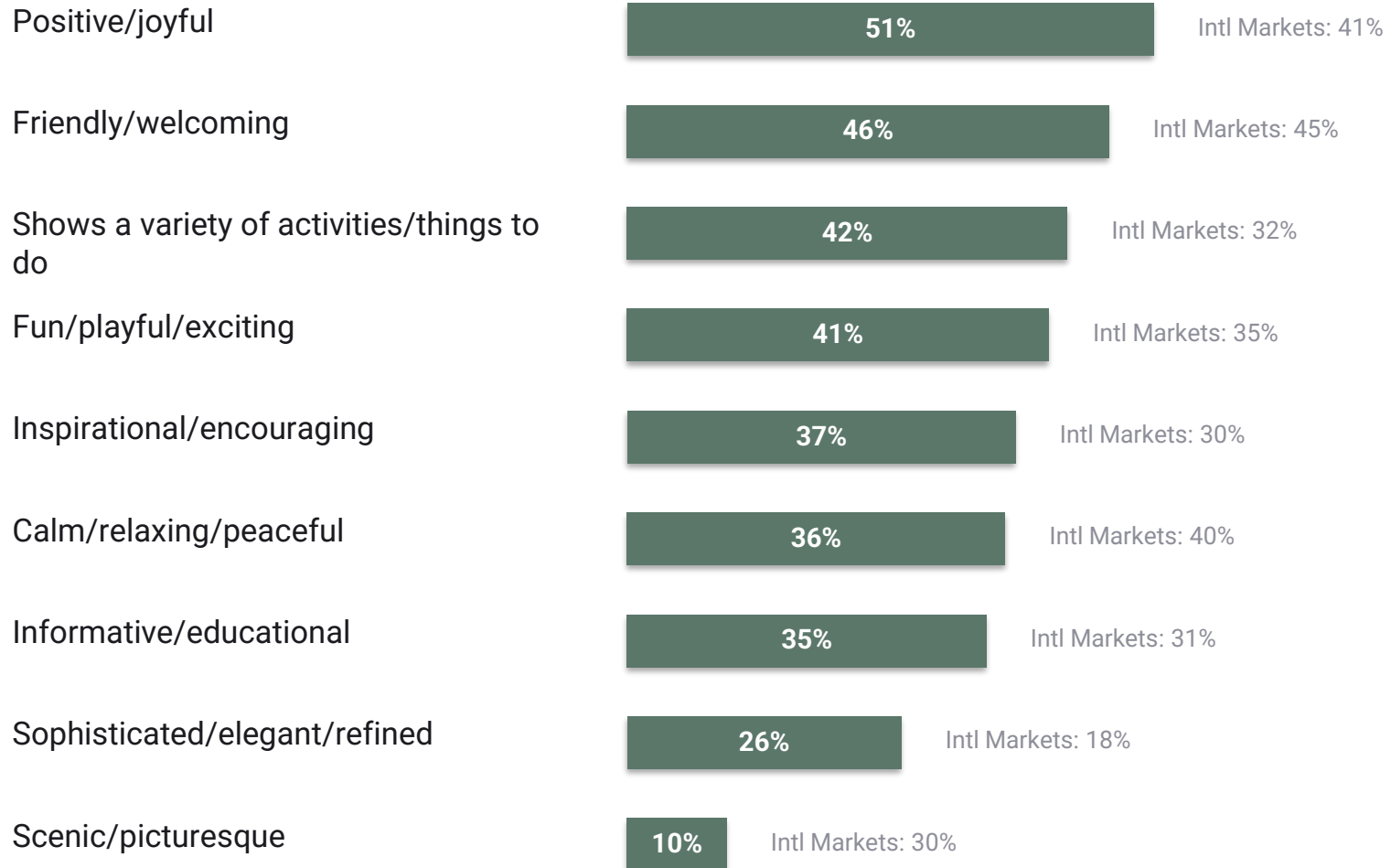
49%

Likely to Visit (5yr)

Intl Markets: 41%

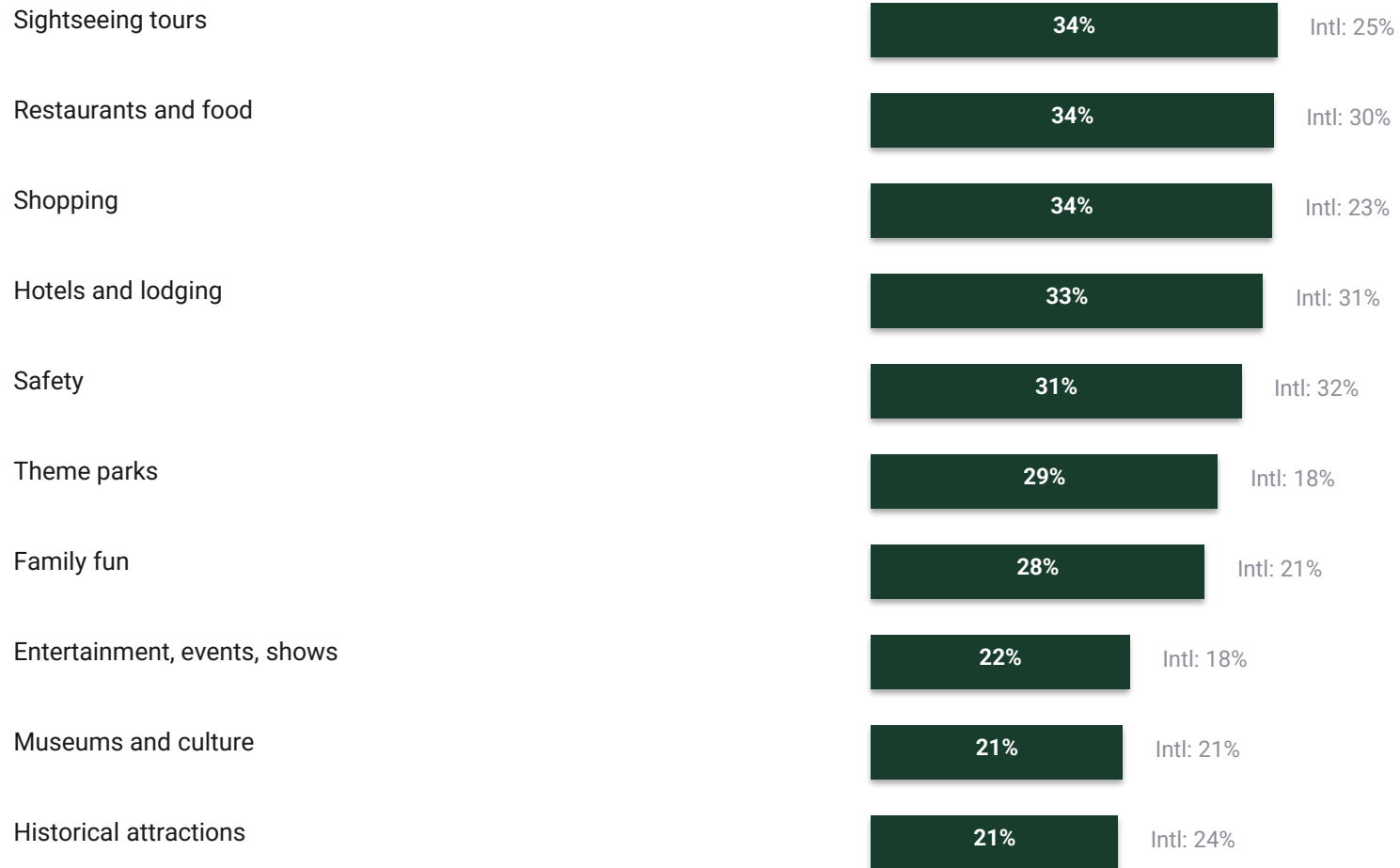
Desired Travel Promotion Tone

Brazil



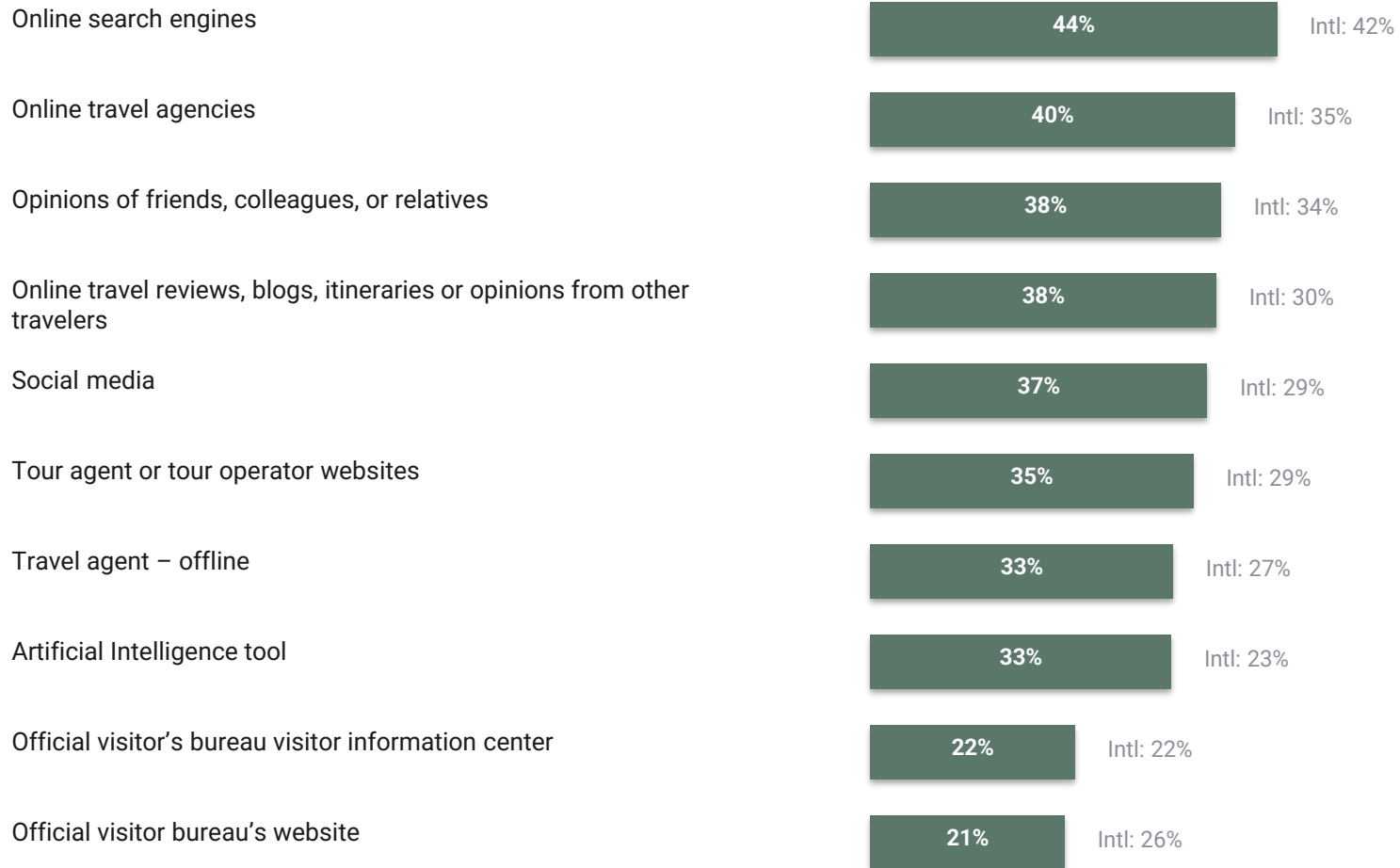
Top Information Sources

Brazil



Planning Resources

Brazil



U.S. Travel Planning & Budget

Brazil

U.S. Trip Planning

52%

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

14.8

Avg Days in the U.S.

Intl Markets: 12.3

5.3

Avg Destinations in the U.S.

Intl Markets: 4.4

2.9

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,391

Hotels

Intl: \$1,568

\$1,127

Shopping

Intl: \$1,001

\$774

Dining

Intl: \$826

\$897

Sightseeing

Intl: \$881

\$623

Transport

Intl: \$772

\$4,812

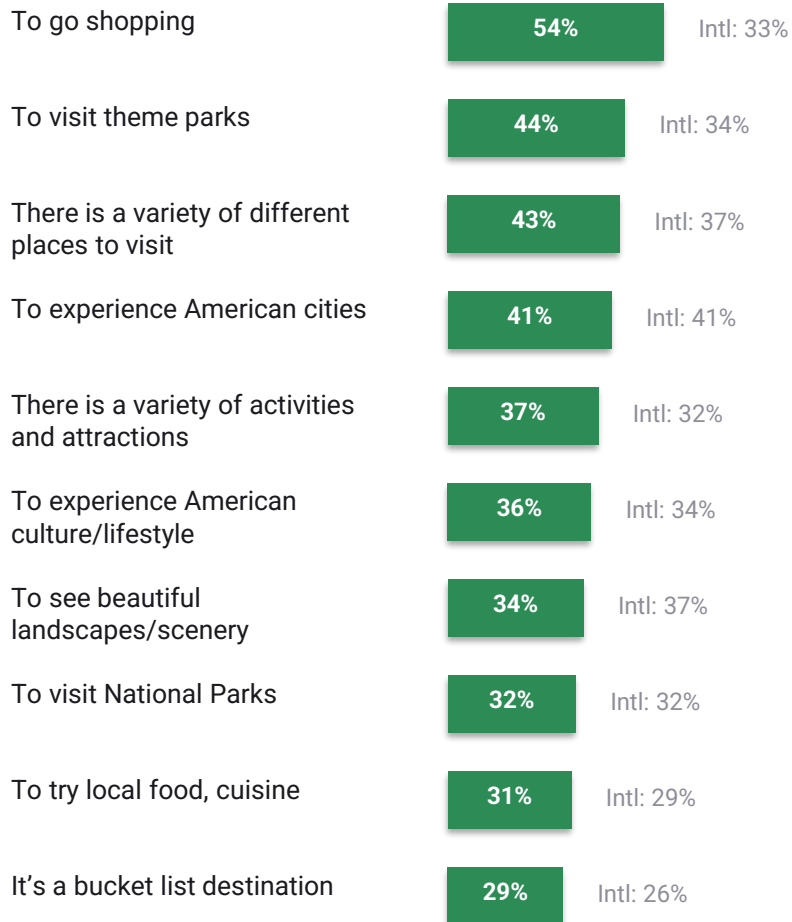
Total

Intl: \$5,049

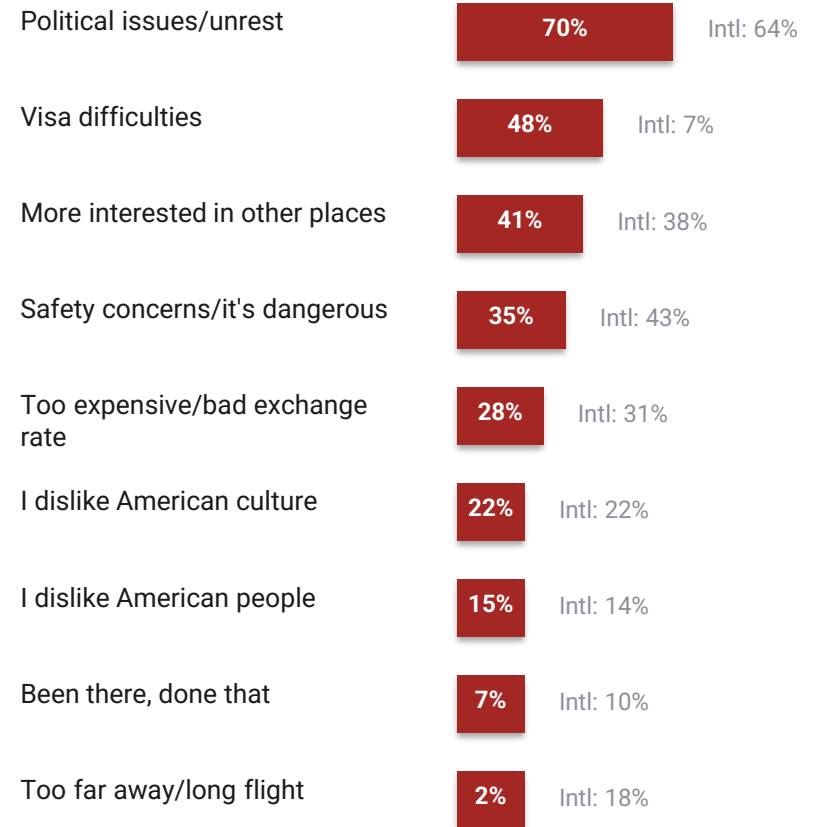
Enablers & Barriers to Visiting

Brazil

Enablers

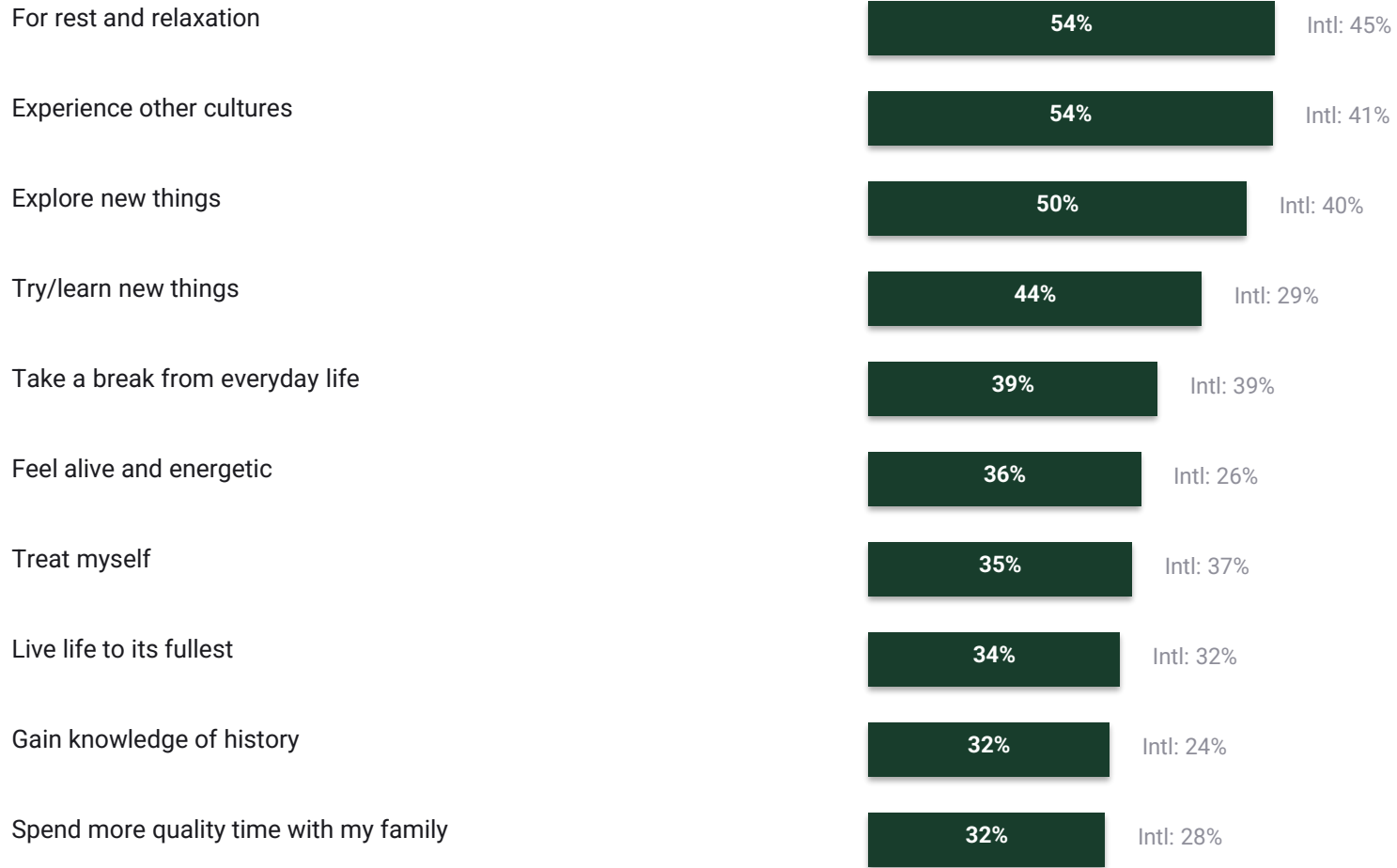


Barriers



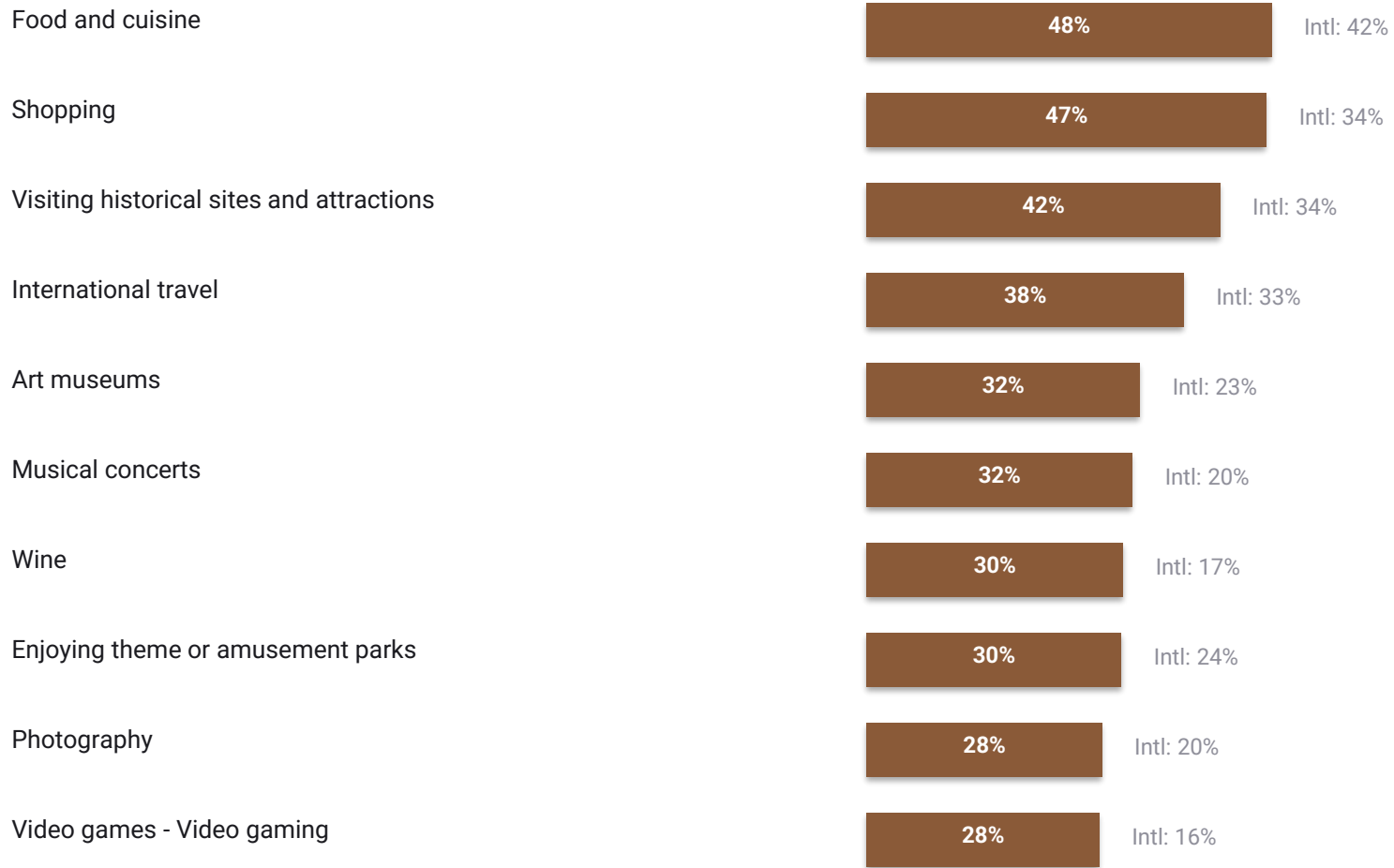
Travel Motivations

Brazil



Hobbies & Passions

Brazil



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

MEXICO

Source Market Analysis | Arkansas

#5 by Spending | #1 by Visits



TravelSouth
All Y'all Are Welcome USA

Mexico | Key Findings

- 1 2026 Arkansas projected spending:** \$7M (+6.1% YOY). Projected visitors: 24.9K (+2.5% YOY). Ranks #5 by spending and #1 by visits among Arkansas source markets.
- 2 Macro Context:** Mexico 2026 GDP growth projected at 1.5%. Exchange rate: 17.23 MXN/USD.
- 3 CAGR Comparison:** 2023-2027 projected spending CAGR (9.6%) exceeds 2015-2019 (3%).
- 4 Visitor Perceptions:** 67% familiarity with the American South, 81% appeal, 46% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$4,449 for a 2-week trip. Average length of stay: 10.2 days. Average destinations: 4.1.
- 6 Top Motivation:** Treat myself (48%)
- 7 Top Enabler:** To go shopping (44%)
- 8 Preferred Tone:** Positive/joyful (43%)
- 9 Top Barrier:** Political issues/unrest (57%)

Mexico

\$7M

2026 Arkansas Spending

+6.1% YOY vs. 2025

24.9K

2026 Arkansas Visitors

+2.5% YOY vs. 2025

\$10.3B

2026 USA Spending

+6.3% YOY vs. 2025

26.5M

2026 USA Visitors

+3.1% YOY vs. 2025

\$6.6M

2025 Arkansas Spending

+4.8% YOY vs. 2024

24.3K

2025 Arkansas Visitors

+8.5% YOY vs. 2024

\$9.7B

2025 USA Spending

+6.7% YOY vs. 2024

25.7M

2025 USA Visitors

+5.9% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

3%

Spending

2.1%

Visits

2023-2027 PROJECTED CAGR

9.6%

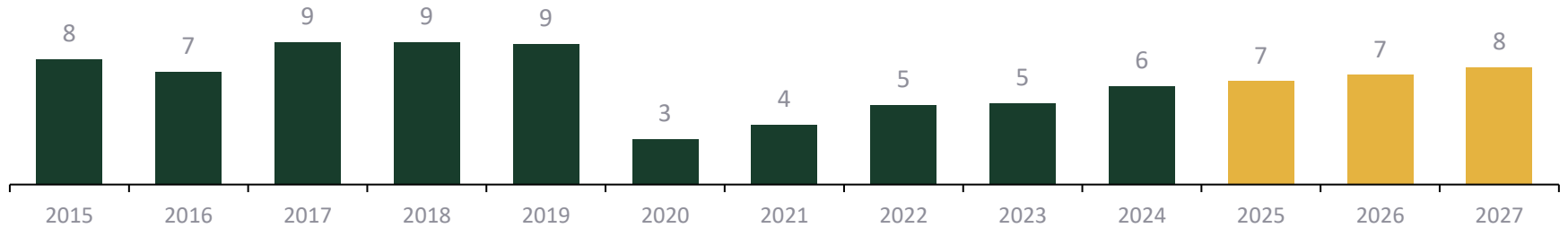
Spending

7.9%

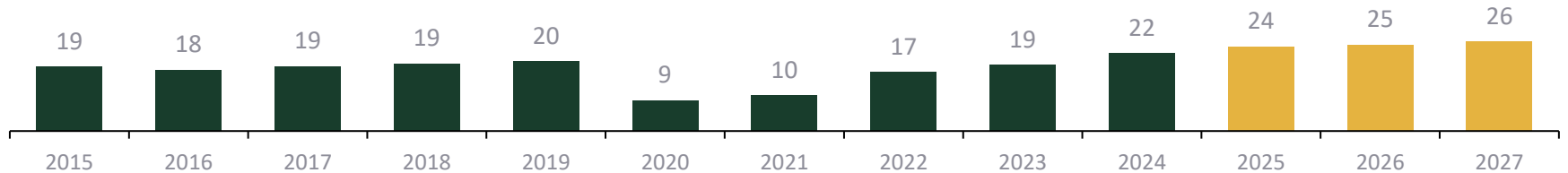
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

Mexico

67%

Familiarity

Intl Markets: 67%

81%

Appeal

Intl Markets: 75%

34%

Promotional Buzz

Intl Markets: 29%

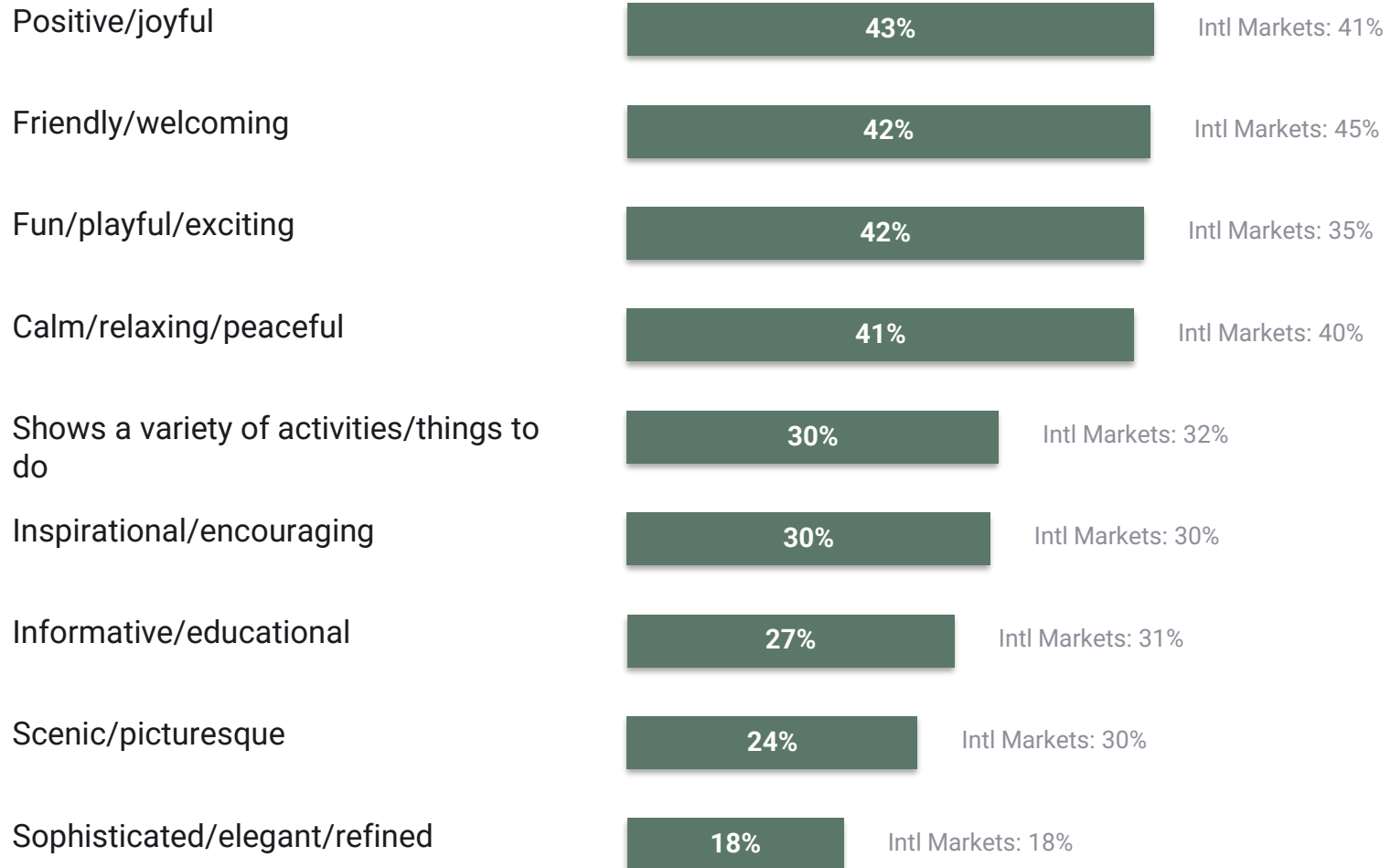
46%

Likely to Visit (5yr)

Intl Markets: 41%

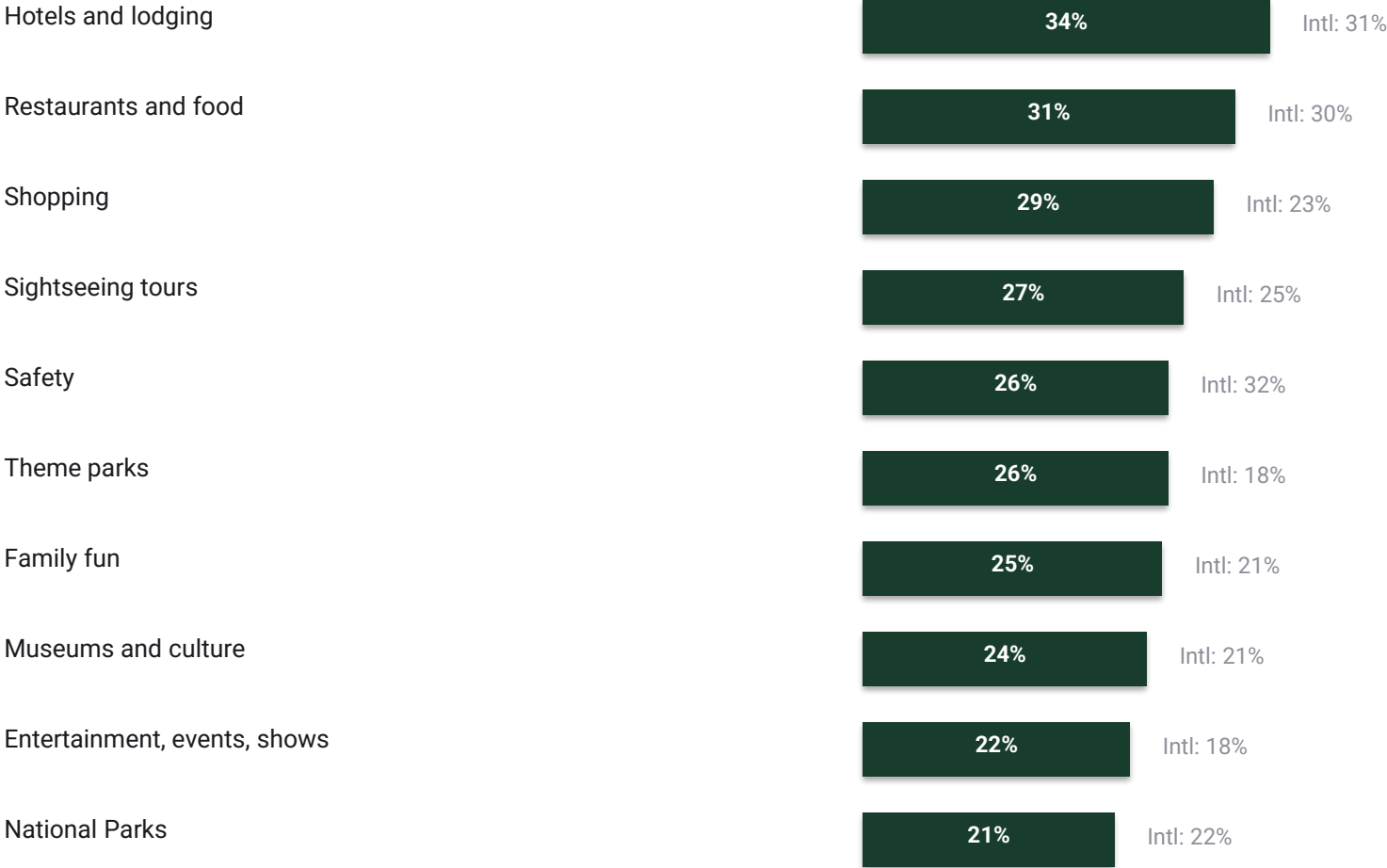
Desired Travel Promotion Tone

Mexico



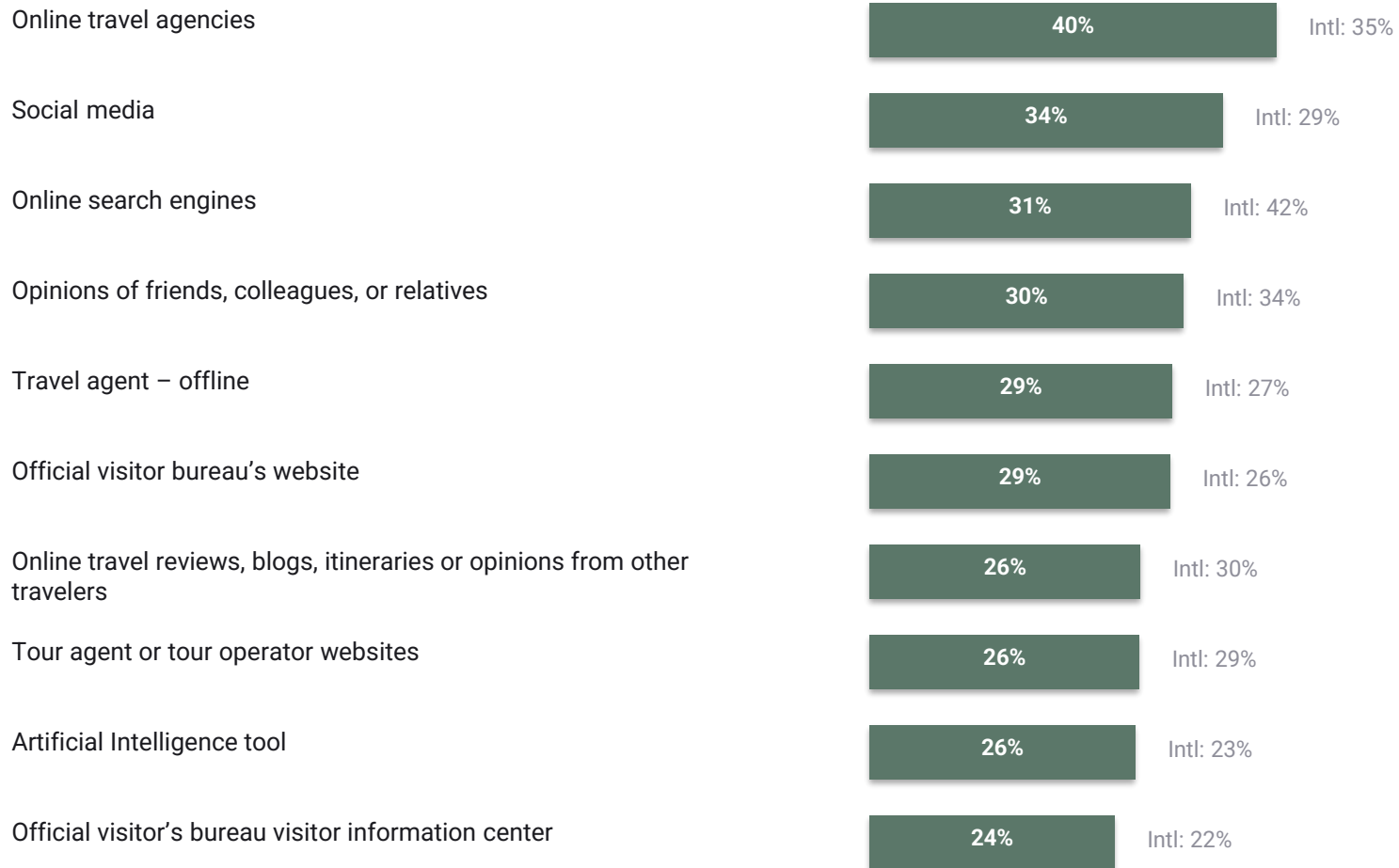
Top Information Sources

Mexico



Planning Resources

Mexico



U.S. Travel Planning & Budget

Mexico

U.S. Trip Planning

50%

Likely to Visit US (2yr)

Intl Markets: 36%

12 wks

Planning Window

Intl Markets: 14 wks

11 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

10.2

Avg Days in the U.S.

Intl Markets: 12.3

4.1

Avg Destinations in the U.S.

Intl Markets: 4.4

2.7

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,329

Hotels

Intl: \$1,568

\$1,039

Shopping

Intl: \$1,001

\$737

Dining

Intl: \$826

\$796

Sightseeing

Intl: \$881

\$548

Transport

Intl: \$772

\$4,449

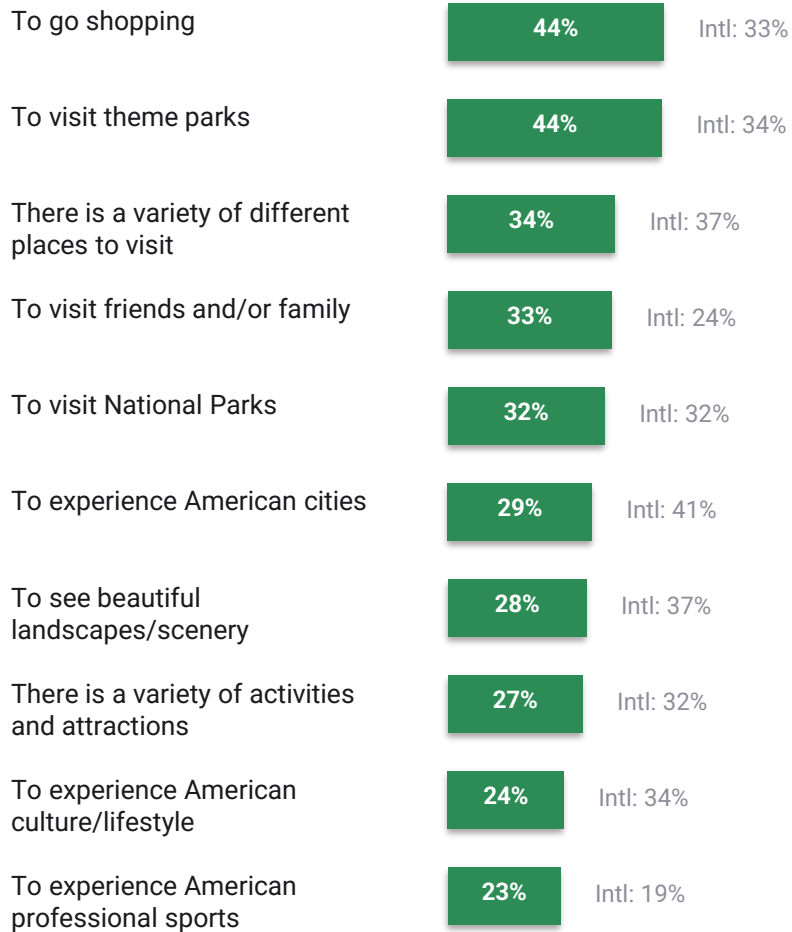
Total

Intl: \$5,049

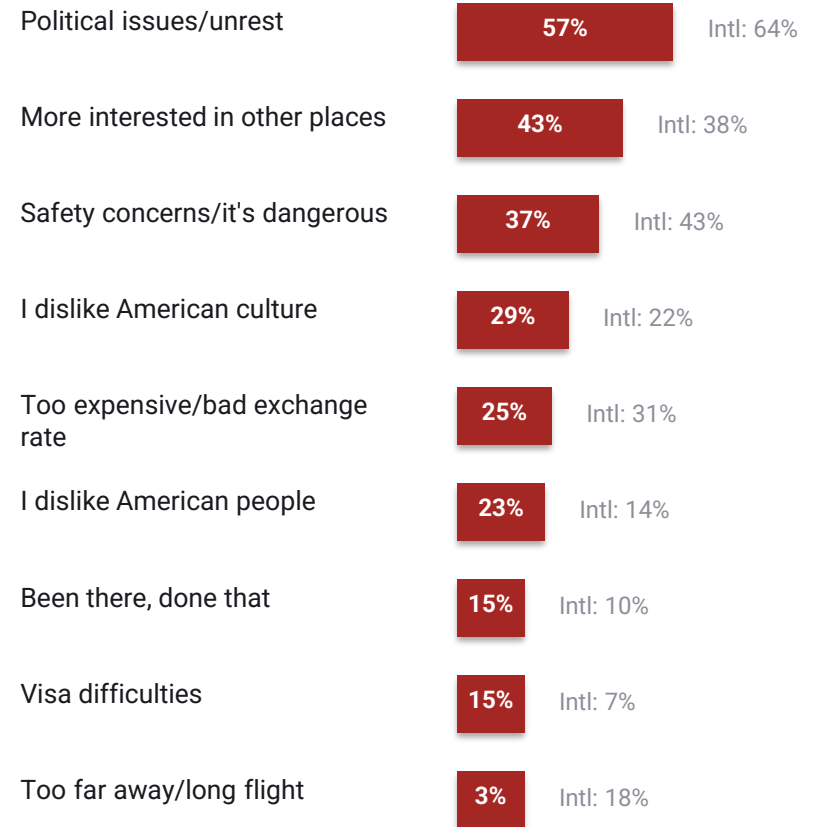
Enablers & Barriers to Visiting

Mexico

Enablers

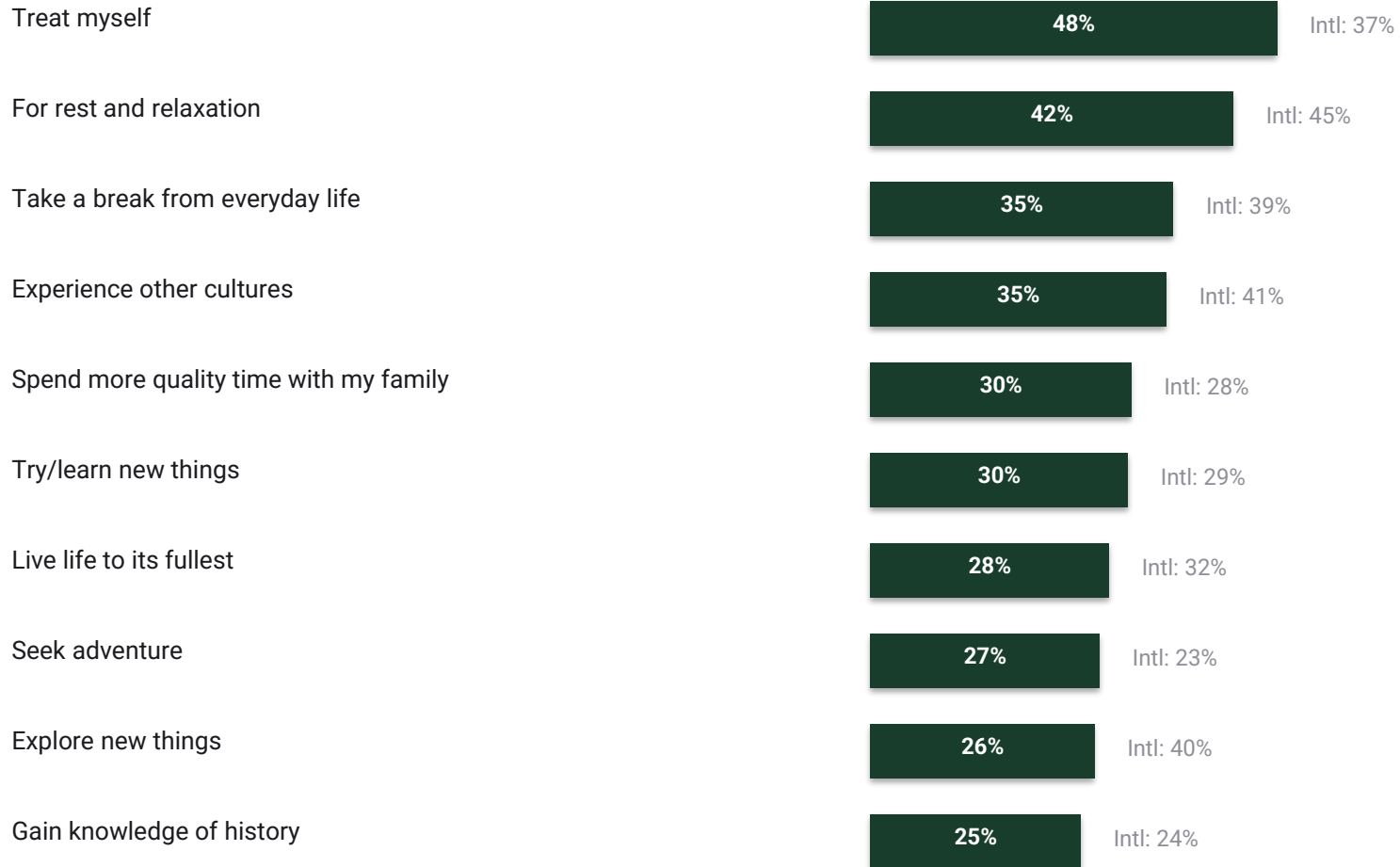


Barriers



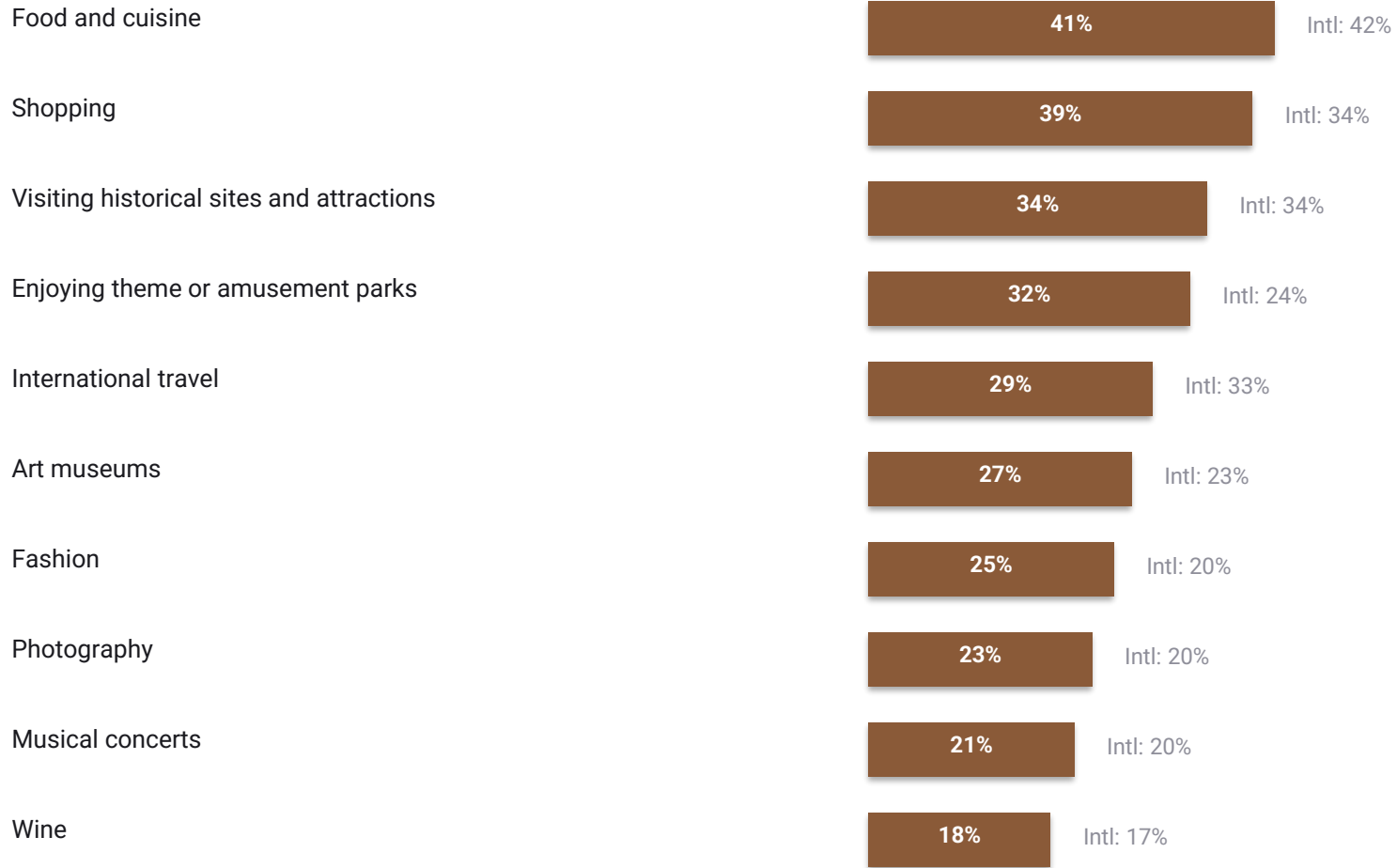
Travel Motivations

Mexico



Hobbies & Passions

Mexico



Travel Trends & Outlook

Mexico

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

54%

Intl: 53%

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

51%

Intl: 54%

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

49%

Intl: 44%

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

48%

Intl: 43%

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

44%

Intl: 42%

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

43%

Intl: 39%

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

41%

Intl: 42%

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

41%

Intl: 34%

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

32%

Intl: 27%

 Mexico

 Intl Markets



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.