



International Visitor Profile

Key Findings

- 1 2026 projected spending:** \$1.9B (+5.6% YOY). Projected visitors: 1.4M (+2.5% YOY).
- 2 Top 10 Source Markets by Spending:** DACH Region (\$211.1M), Canada (\$183.9M), UK + Ireland (\$162.6M), India (\$129.6M), China (\$122.9M), Brazil (\$114.7M), South Korea (\$59.7M), Benelux (\$58.1M), France (\$47.0M), Australia (\$46.5M).
- 3 Top 5 Growth Markets (Spending YOY):** Bulgaria (+15.6%), Taiwan (+15.0%), South Africa (+12.3%), Saudi Arabia (+12.3%), Russia (+11.7%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-9.8%), Turkey (-1.4%).
- 5 DACH Region leads by spending** (\$211.1M). Canada leads by visits (391.2K).
- 6 CAGR:** 2023-2027 projected spending CAGR (7.2%) exceeds 2015-2019 (3.1%).
- 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%)

Georgia

\$1.9B

2026 Projected Spending

+5.6% YOY vs. 2025

\$1.7B

2026 Overseas Spending

+5.7% YOY vs. 2025

\$1.8B

2025 Projected Spending

-1.7% YOY vs. 2024

\$1.6B

2025 Overseas Spending

+0.5% YOY vs. 2024

1.4M

2026 Projected Visitors

+2.5% YOY vs. 2025

975.4K

2026 Overseas Visitors

+2.8% YOY vs. 2025

1.4M

2025 Projected Visitors

-7.5% YOY vs. 2024

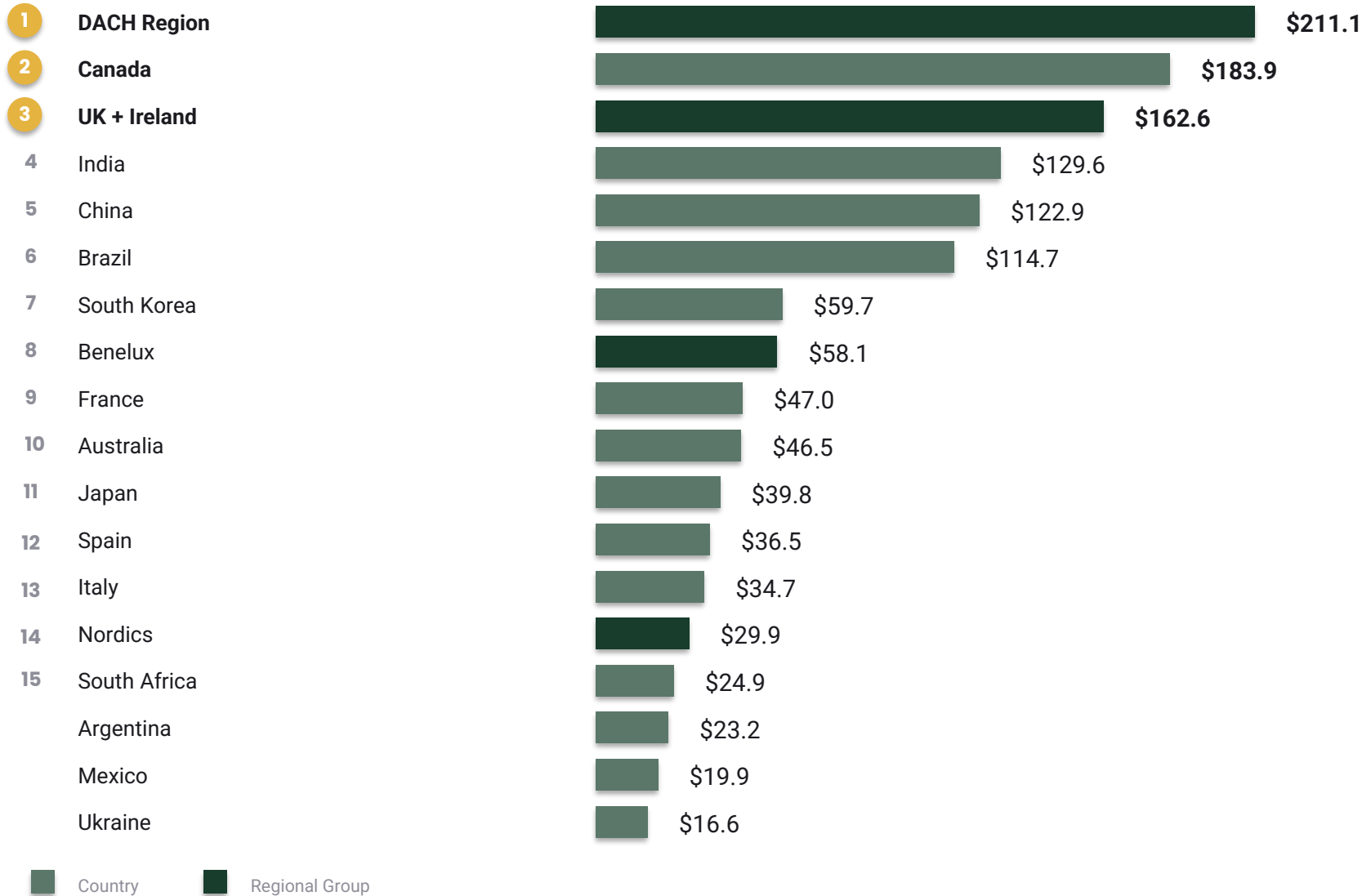
948.9K

2025 Overseas Visitors

-1.7% YOY vs. 2024

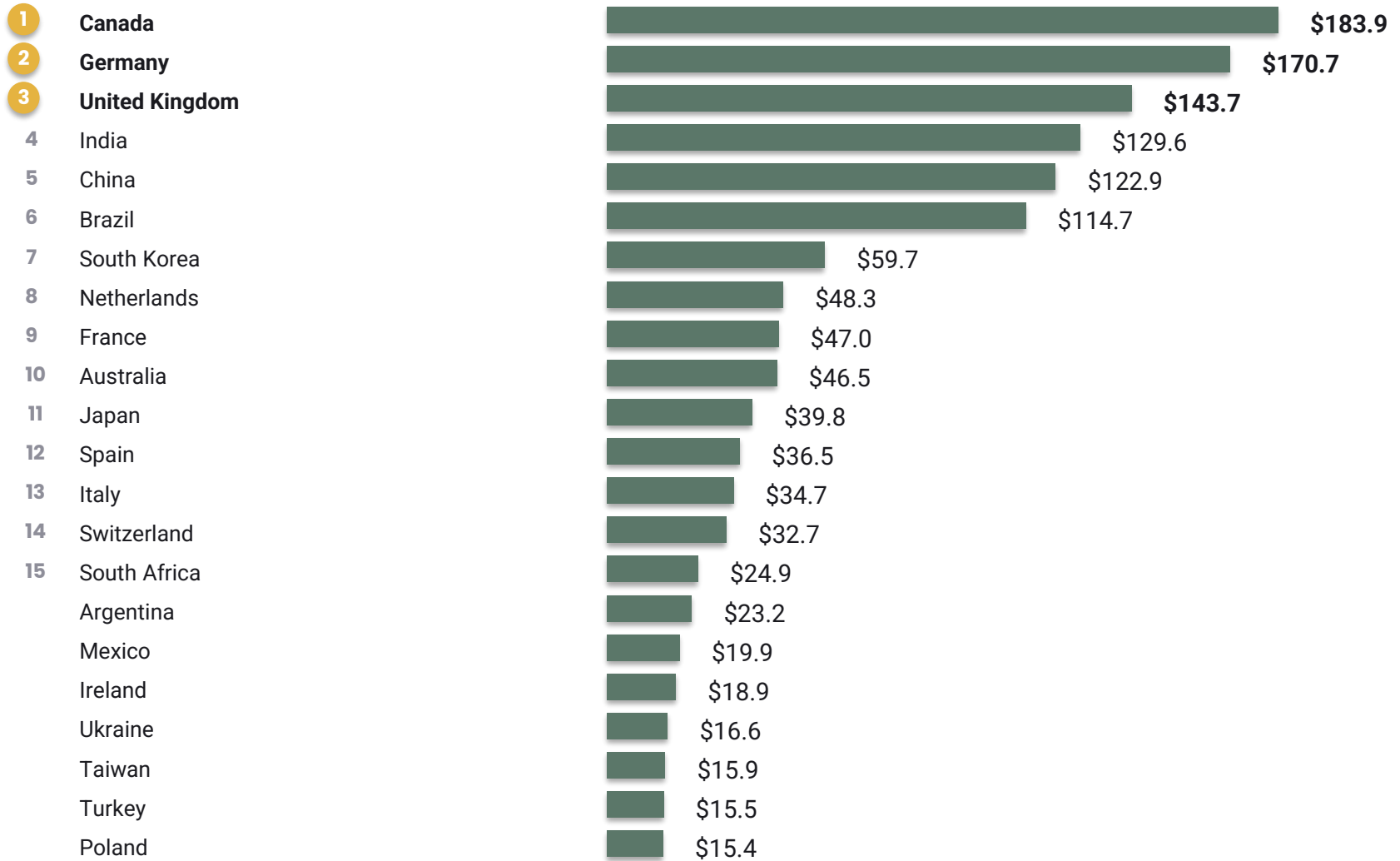
Top Source Markets | 2026 Projections

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	Canada	\$183.9	391.2	+4.7%	+2.9%
2	Germany	\$170.7	56.8	+9.8%	+3.1%
3	United Kingdom	\$143.7	94.0	+1.4%	+3.6%
4	India	\$129.6	96.5	+4.9%	+0.6%
5	China	\$122.9	43.8	+4.8%	+6.6%
6	Brazil	\$114.7	52.4	+5.9%	+4.7%
7	South Korea	\$59.7	75.6	+5.8%	+5.2%
8	Netherlands	\$48.3	28.2	+8.5%	+2.7%
9	France	\$47.0	38.2	+3.8%	-0.5%
10	Australia	\$46.5	16.9	+5.7%	+3.7%
11	Japan	\$39.8	33.3	+6.8%	+0.4%
12	Spain	\$36.5	24.3	+8.9%	+5.5%
13	Italy	\$34.7	27.3	+3.2%	+0.2%
14	Switzerland	\$32.7	10.3	+8.9%	+6.5%
15	South Africa	\$24.9	14.7	+12.3%	+8.0%
16	Argentina	\$23.2	26.4	+8.0%	+9.5%
17	Mexico	\$19.9	50.9	+8.0%	-6.4%
18	Ireland	\$18.9	12.8	+6.4%	+2.2%
19	Ukraine	\$16.6	4.7	+7.3%	+3.1%
20	Taiwan	\$15.9	7.2	+15.0%	+7.7%
21	Turkey	\$15.5	11.2	-1.4%	-3.6%
22	Poland	\$15.4	5.8	+1.9%	-3.2%

% Change | 2025 Projections vs. 2024

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

#	Market	Spending %Δ	Visits %Δ
1	Canada	-19.3%	-19.2%
2	Germany	-5.6%	-9.2%
3	United Kingdom	+1.8%	-2.6%
4	India	-4.9%	+4.2%
5	China	+5.4%	-0.7%
6	Brazil	+3.2%	+4.5%
7	South Korea	+1.9%	-4.8%
8	Netherlands	-0.8%	-8.4%
9	France	-0.5%	-6.7%
10	Australia	-4.9%	-3.7%
11	Japan	+16.3%	+8.7%
12	Spain	+8.8%	-0.7%
13	Italy	+11.9%	+0.2%
14	Switzerland	-5.7%	-5.1%
15	South Africa	-3.5%	-5.0%
16	Argentina	+24.0%	+12.8%
17	Mexico	+4.3%	-9.3%
18	Ireland	+4.9%	+0.8%
19	Ukraine	+8.4%	+13.3%
20	Taiwan	+34.9%	+12.8%
21	Turkey	+7.9%	+0.8%
22	Poland	+12.3%	+9.7%



Decline



Growth

Growth Trajectory

2015-2019 CAGR

3.1%

Spending

1.9%

Visits

2023-2027 PROJECTED CAGR

7.2%

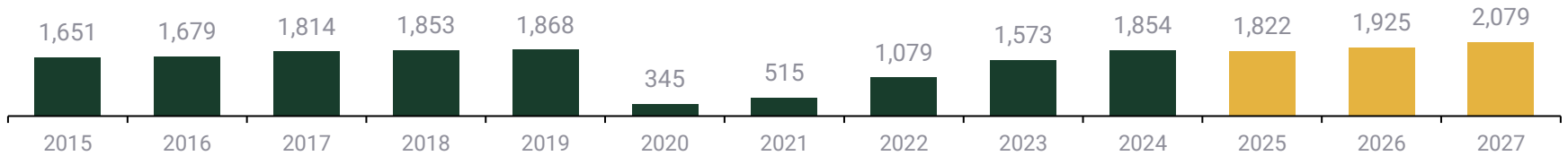
Spending

2.5%

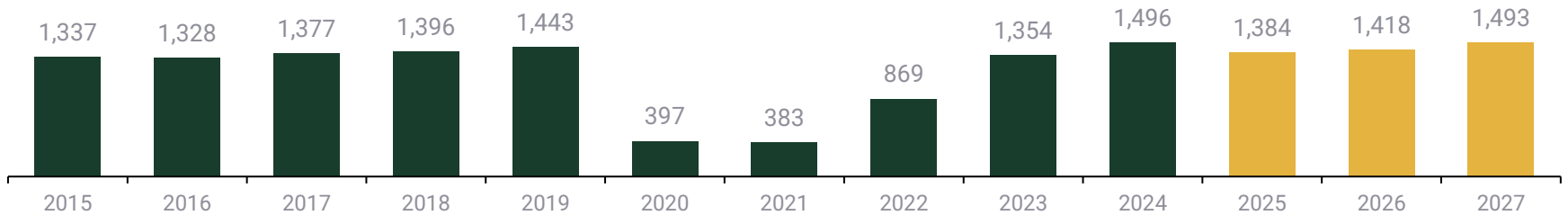
Visits

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)

Canada

1.5%

GDP % Change

1.37

CAD/USD

Germany

0.9%

GDP % Change

1.18

EUR/USD

United Kingdom

1.3%

GDP % Change

1.35

GBP/USD

India

6.2%

GDP % Change

90.92

INR/USD

China

4.2%

GDP % Change

6.84

CNY/USD

Brazil

1.9%

GDP % Change

5.15

BRL/USD

South Korea

1.8%

GDP % Change

1,433.32

KRW/USD

Netherlands

1.2%

GDP % Change

1.18

EUR/USD

France

0.9%

GDP % Change

1.18

EUR/USD

Australia

2.1%

GDP % Change

0.71

AUD/USD

Visitor Perceptions | The American South

International Markets

67%

Familiarity

75%

Appeal

29%

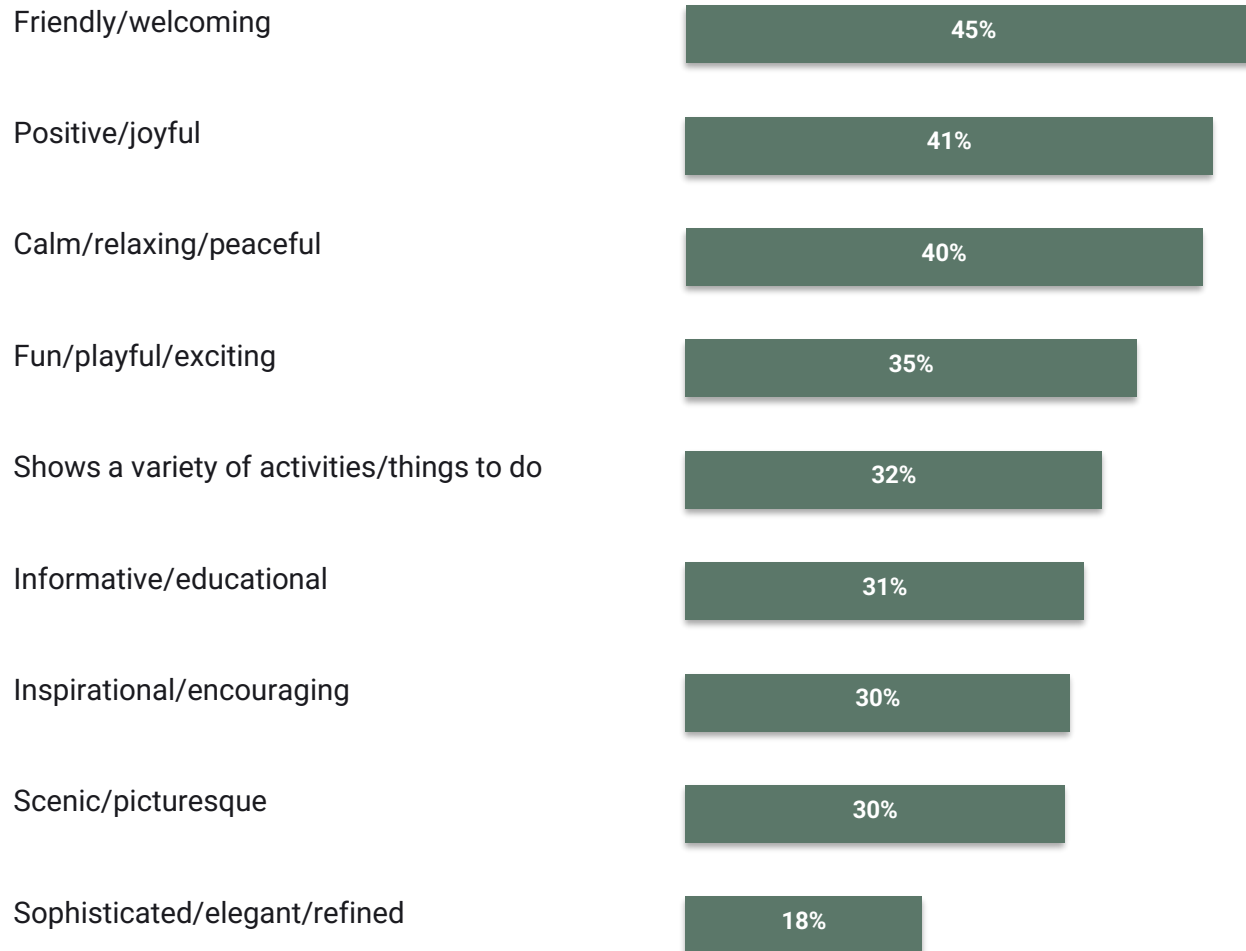
Promotional Buzz

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

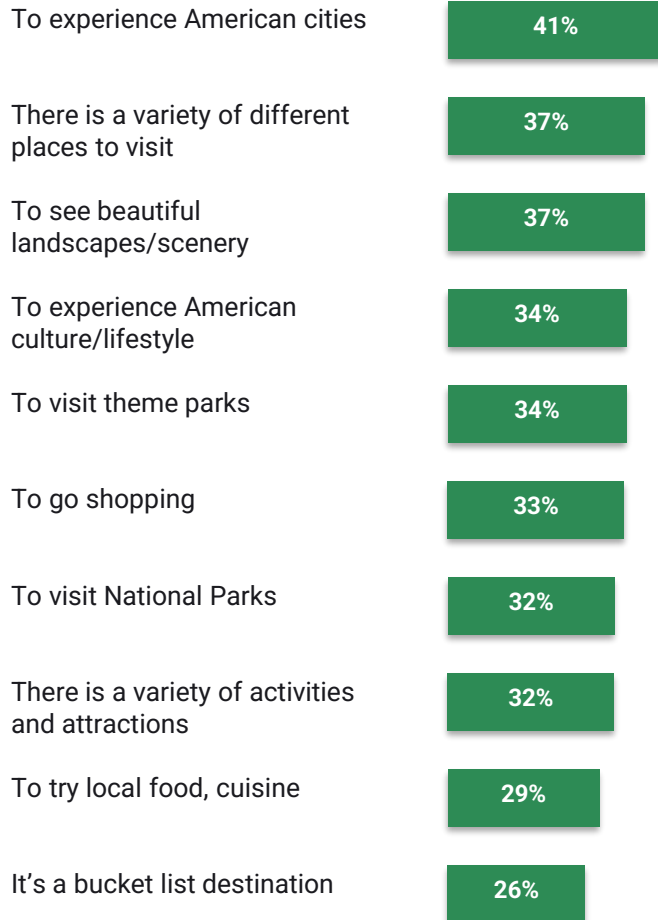
Total

Intl: \$5,049

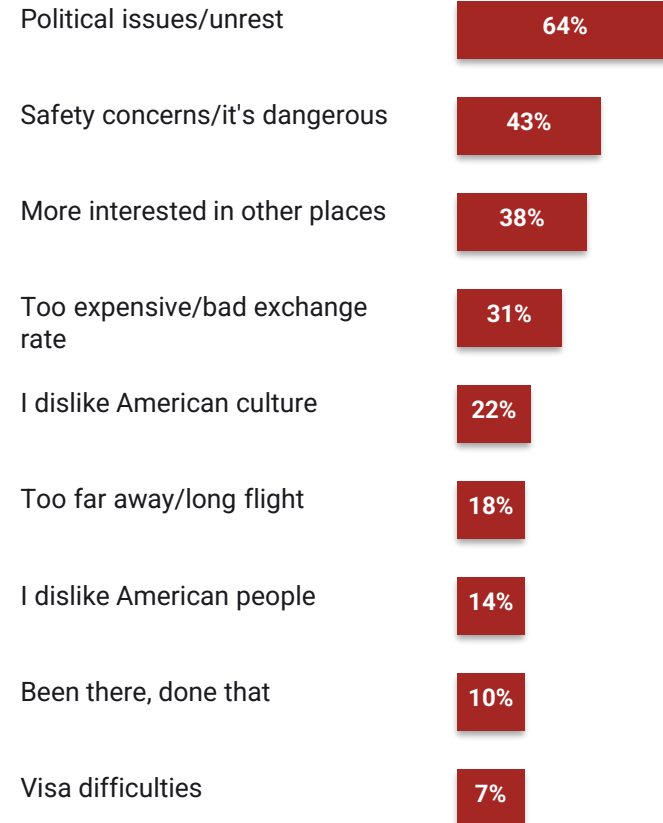
Enablers & Barriers to Visiting

International Markets

Enablers

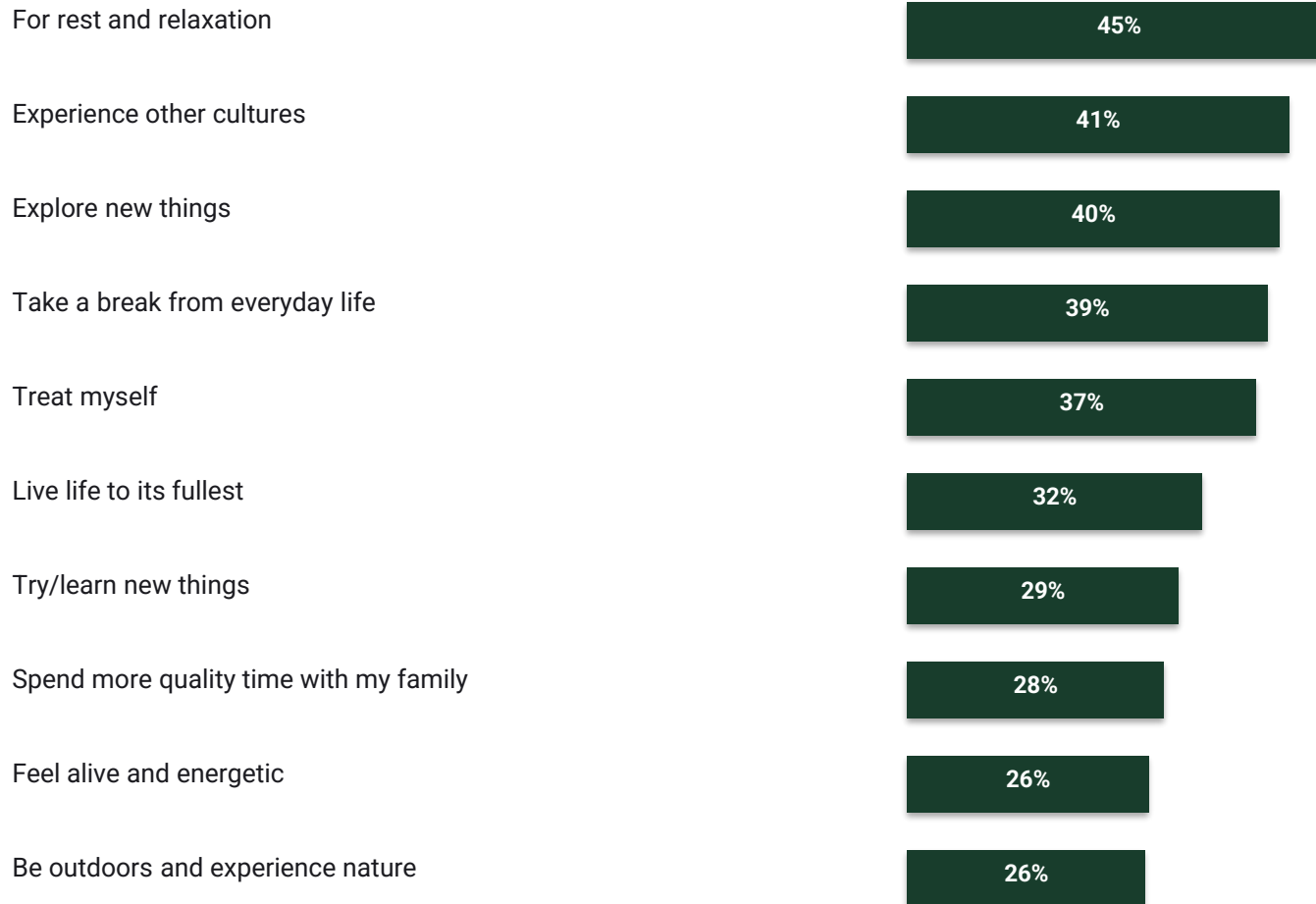


Barriers



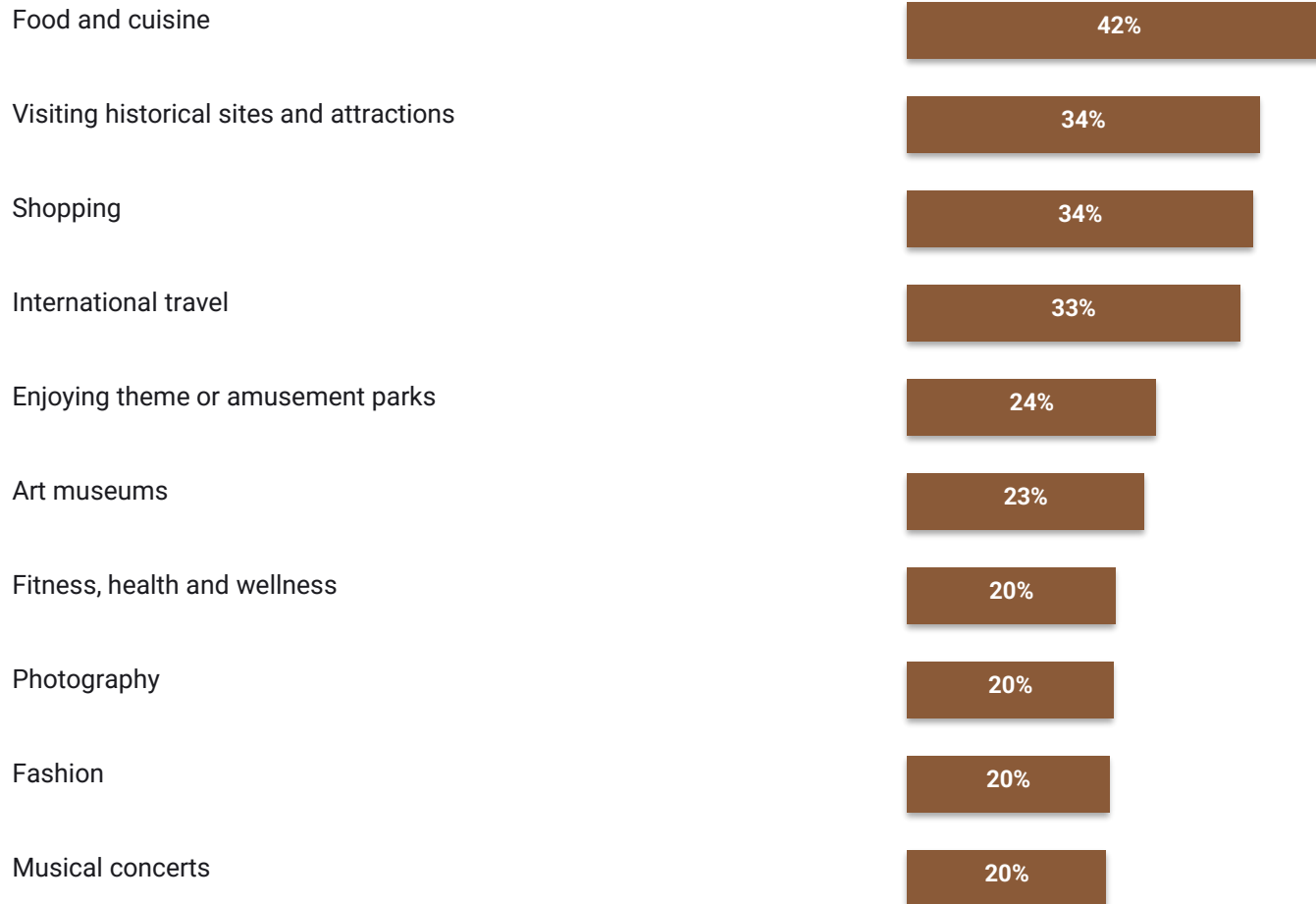
Travel Motivations

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

CANADA

Source Market Analysis | Georgia

#1 by Spending | #1 by Visits

EXPLORE
GEORGIA.
USA

TravelSouth
All Y'all Are Welcome USA

Canada | Key Findings

- 1 2026 Georgia projected spending:** \$183.9M (+4.7% YOY). Projected visitors: 391.2K (+2.9% YOY). Ranks #1 by spending and #1 by visits among Georgia 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 (0.7%) trails 2015-2019 (0.8%).
- 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

\$183.9M

2026 Georgia Spending

+4.7% YOY vs. 2025

391.2K

2026 Georgia Visitors

+2.9% YOY vs. 2025

\$16.4B

2026 USA Spending

+7.6% YOY vs. 2025

20.9M

2026 USA Visitors

+6.6% YOY vs. 2025

\$175.6M

2025 Georgia Spending

-19.3% YOY vs. 2024

380.2K

2025 Georgia Visitors

-19.2% YOY vs. 2024

\$15.2B

2025 USA Spending

-21.5% YOY vs. 2024

19.6M

2025 USA Visitors

-23.1% YOY vs. 2024

Visitor Perceptions | The American South

Canada

66%

Familiarity

Intl Markets: 67%

70%

Appeal

Intl Markets: 75%

24%

Promotional Buzz

Intl Markets: 29%

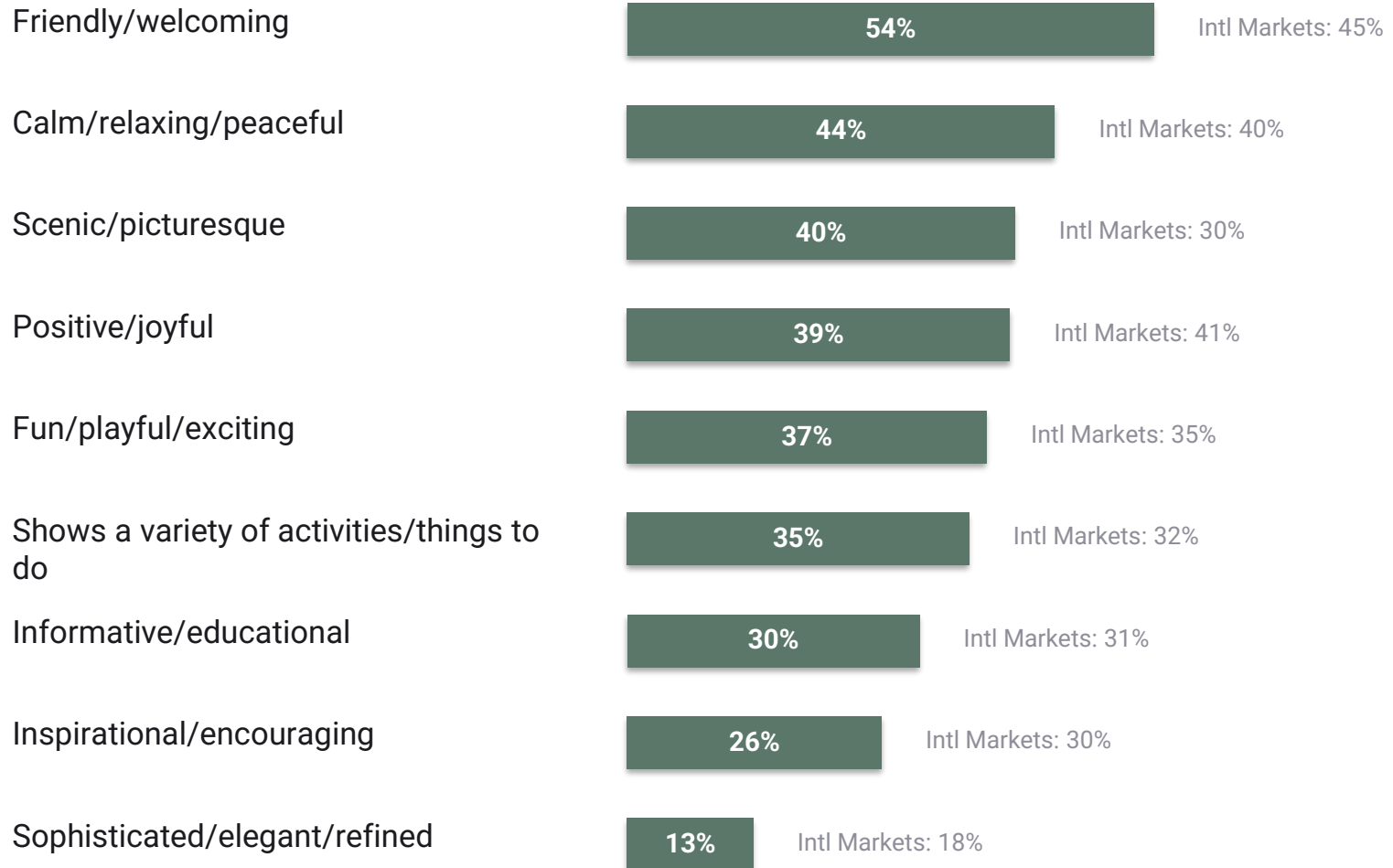
38%

Likely to Visit (5yr)

Intl Markets: 41%

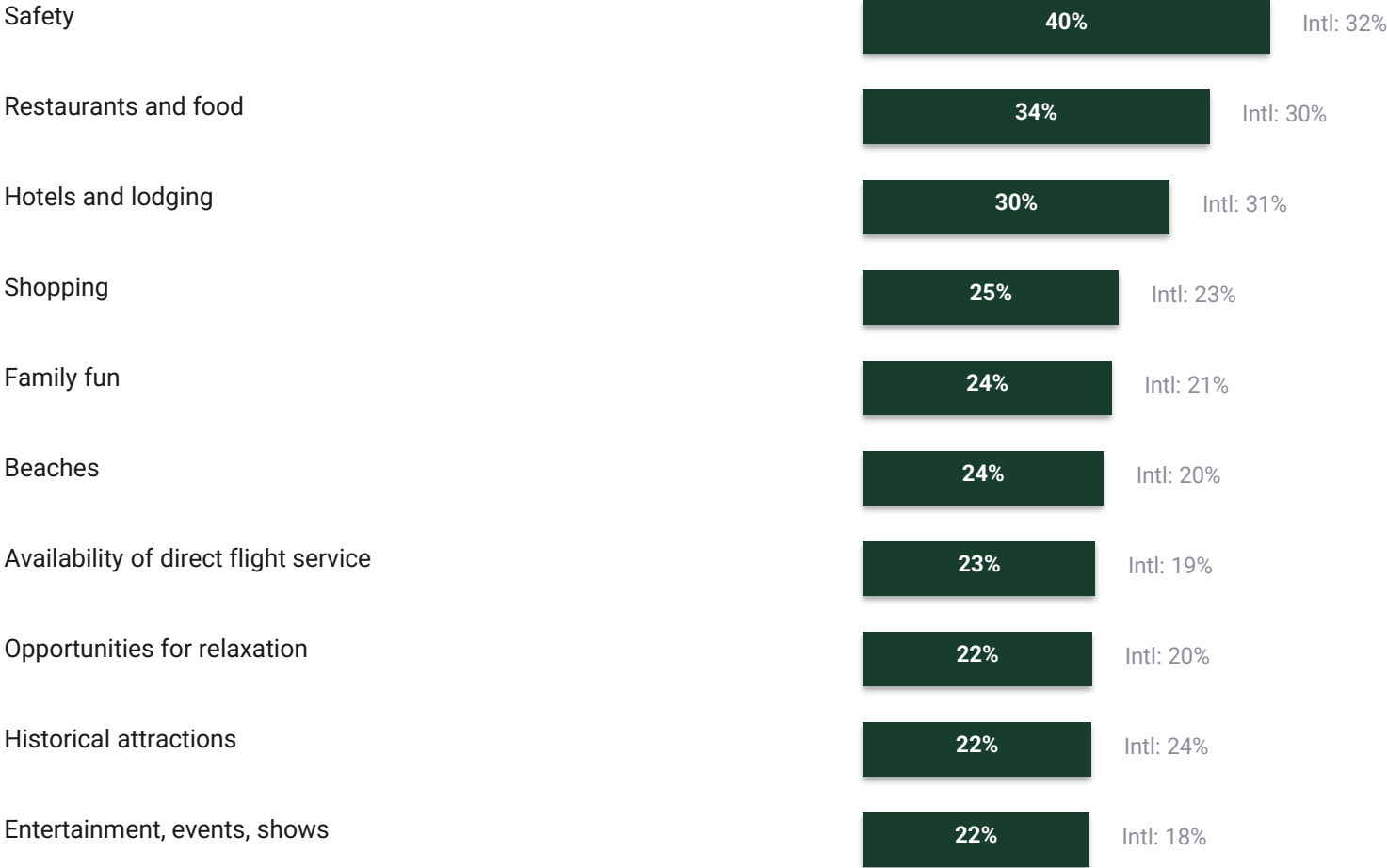
Desired Travel Promotion Tone

Canada



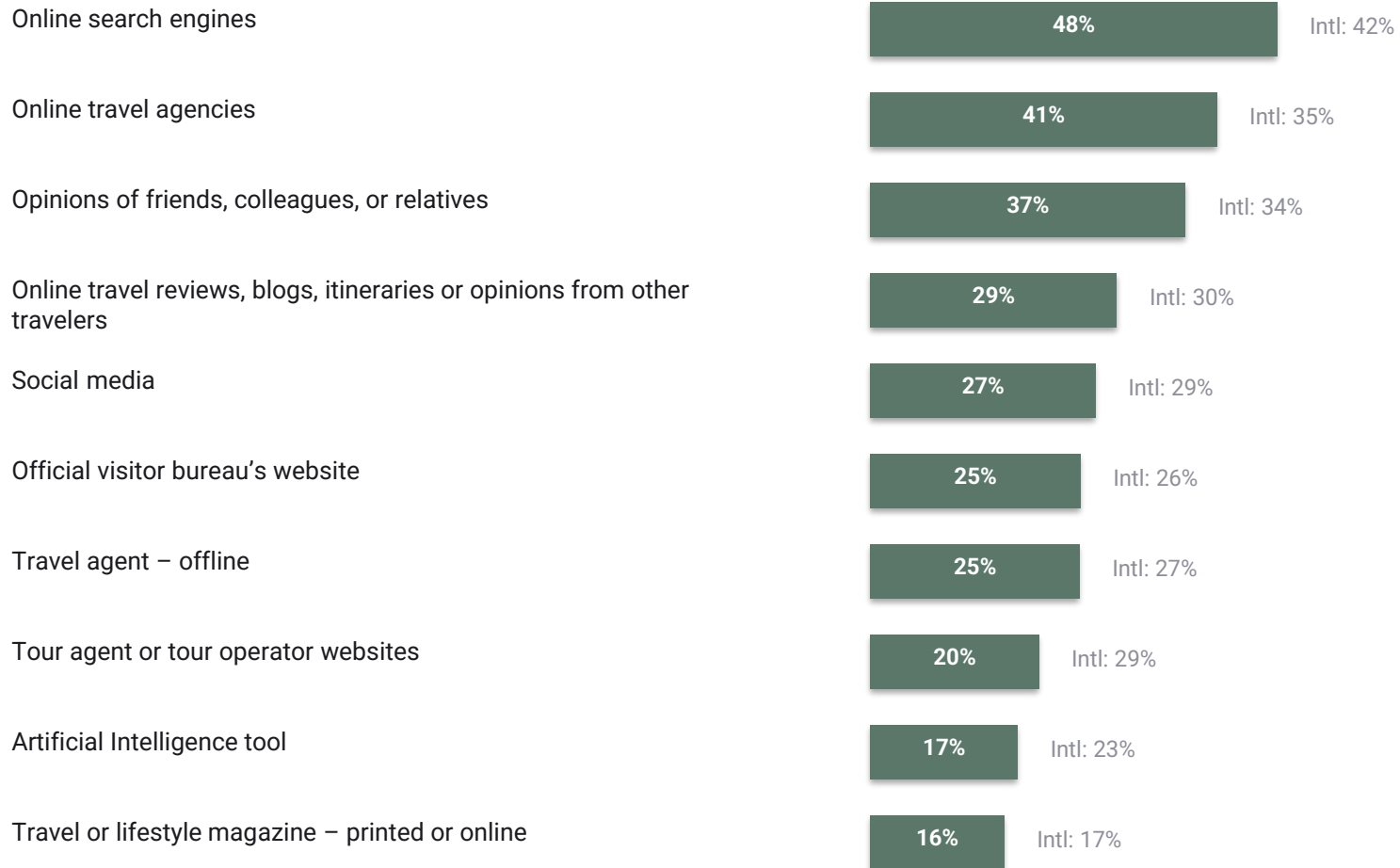
Top Information Sources

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

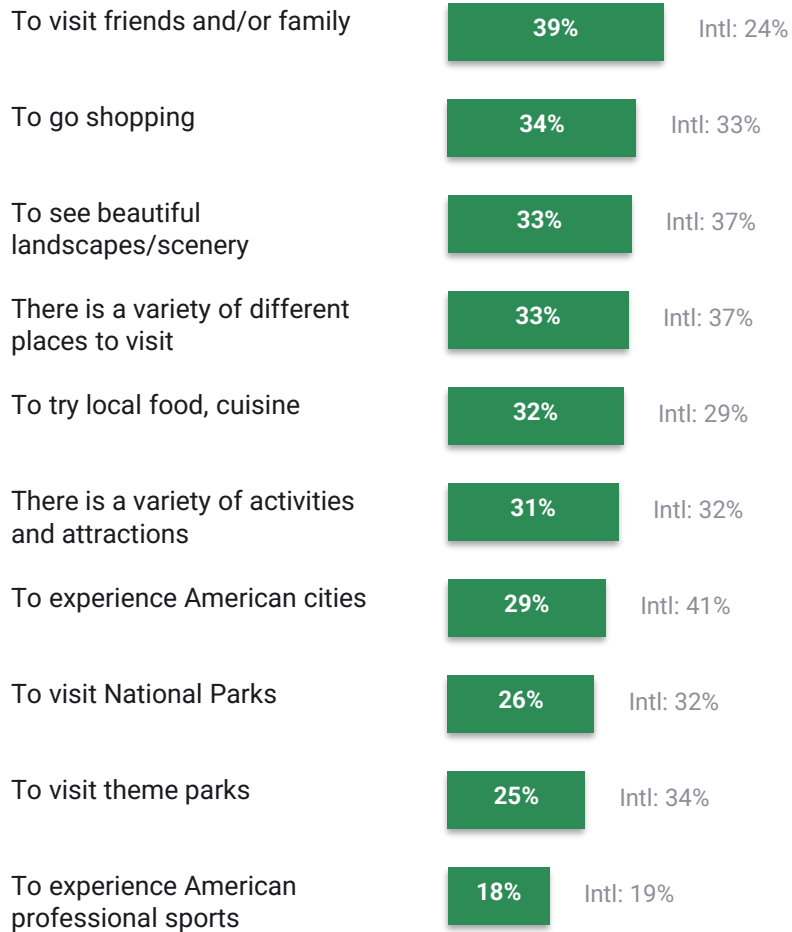
Total

Intl: \$5,049

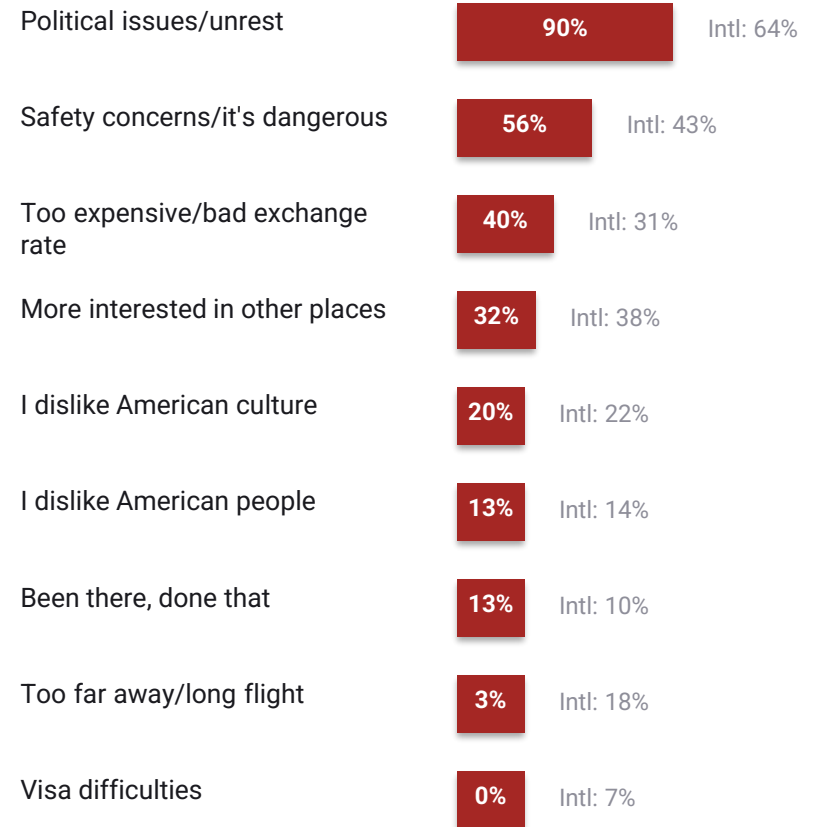
Enablers & Barriers to Visiting

Canada

Enablers

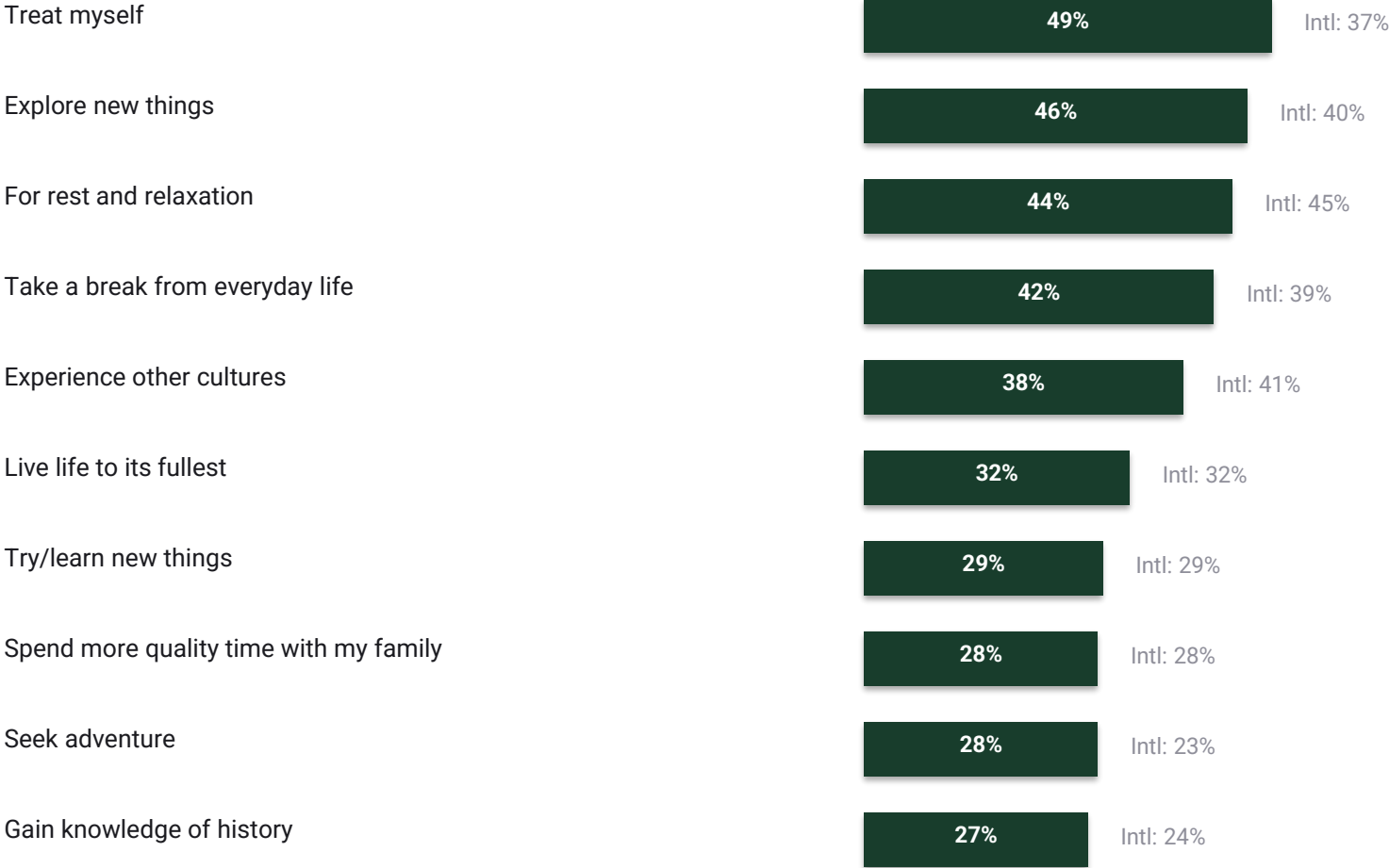


Barriers



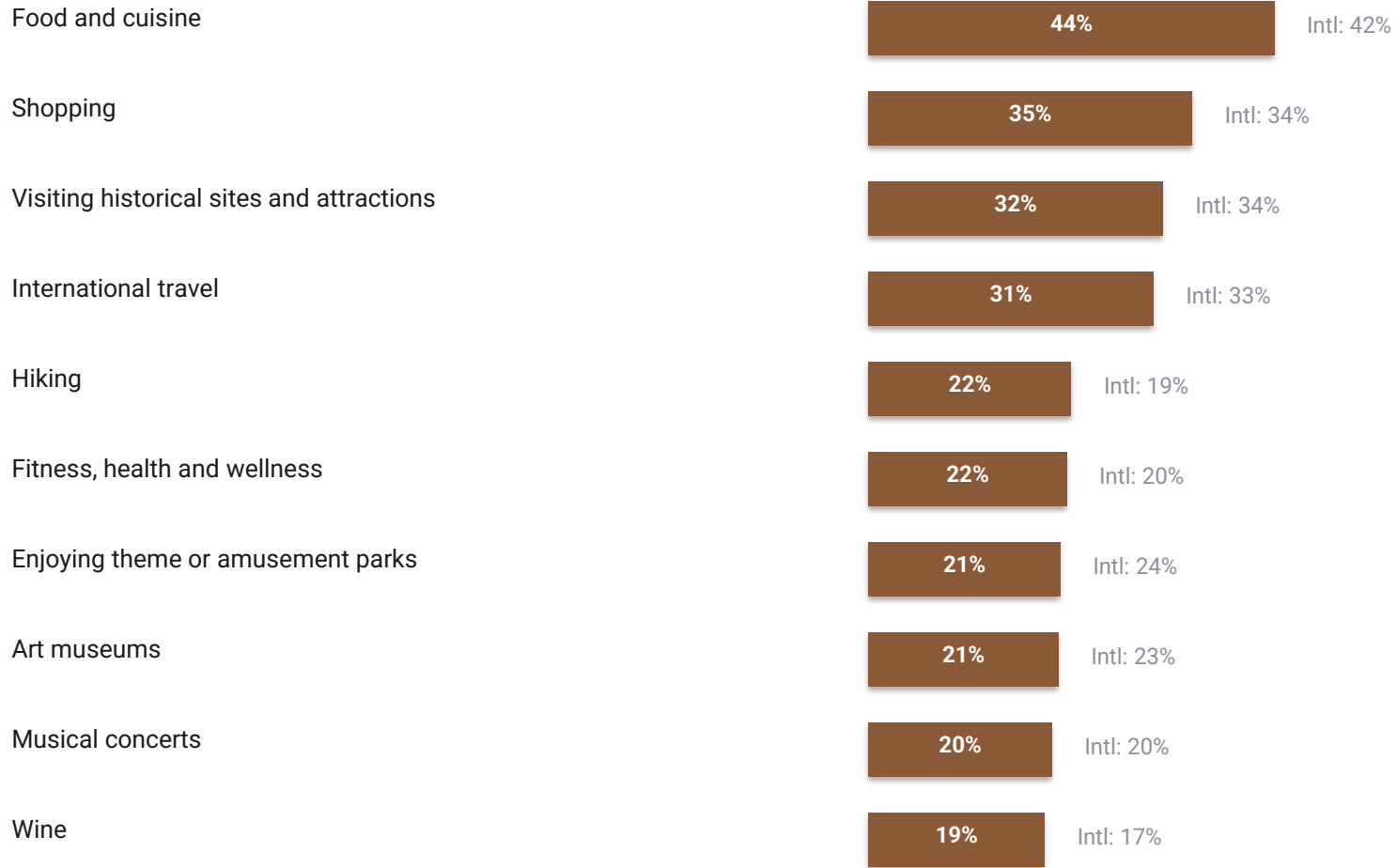
Travel Motivations

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

GERMANY

Source Market Analysis | Georgia

#2 by Spending | #5 by Visits

EXPLORE
GEORGIA.
USA

TravelSouth
All Y'all Are Welcome USA

Germany | Key Findings

- 1 2026 Georgia projected spending:** \$170.7M (+9.8% YOY). Projected visitors: 56.8K (+3.1% YOY). Ranks #2 by spending and #5 by visits among Georgia 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 (4.3%) exceeds 2015-2019 (3%).
- 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%)

Germany

\$170.7M

2026 Georgia Spending

+9.8% YOY vs. 2025

56.8K

2026 Georgia Visitors

+3.1% YOY vs. 2025

\$6.3B

2026 USA Spending

+7.7% YOY vs. 2025

2.8M

2026 USA Visitors

+3.8% YOY vs. 2025

\$155.4M

2025 Georgia Spending

-5.6% YOY vs. 2024

55.1K

2025 Georgia Visitors

-9.2% YOY vs. 2024

\$5.8B

2025 USA Spending

+1.3% YOY vs. 2024

2.7M

2025 USA Visitors

-11.4% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

3%

Spending

0.1%

Visits

2023-2027 PROJECTED CAGR

4.3%

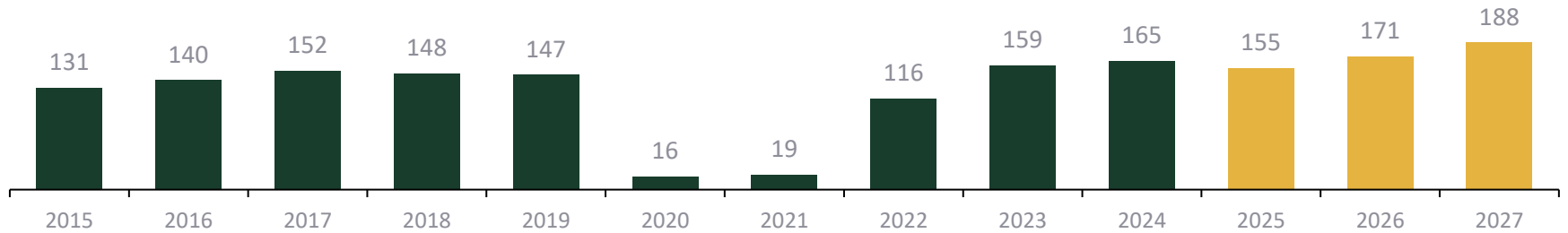
Spending

0.7%

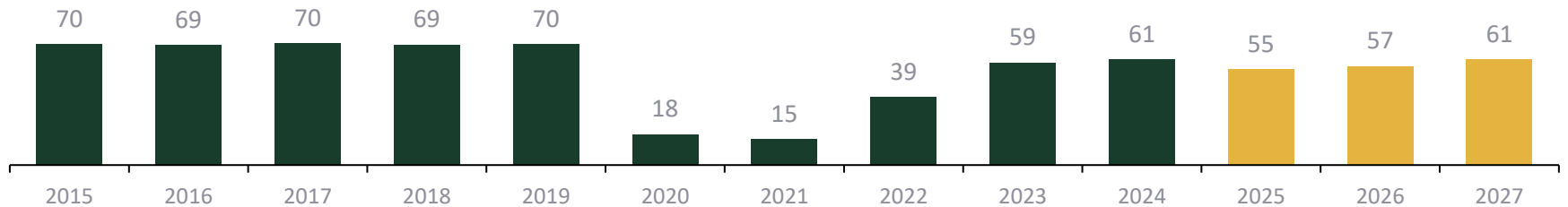
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

Germany

67%

Familiarity

Intl Markets: 67%

72%

Appeal

Intl Markets: 75%

28%

Promotional Buzz

Intl Markets: 29%

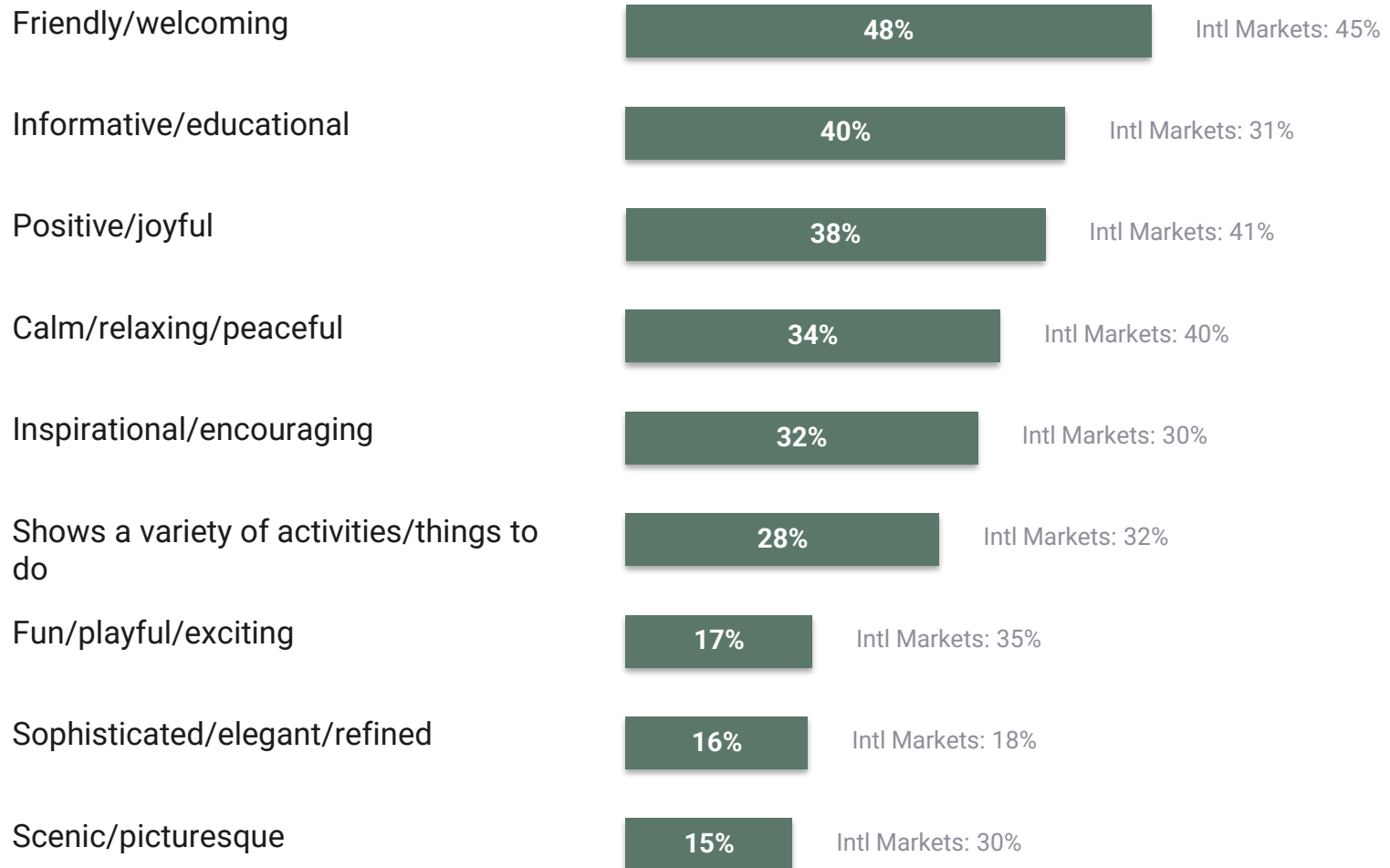
36%

Likely to Visit (5yr)

Intl Markets: 41%

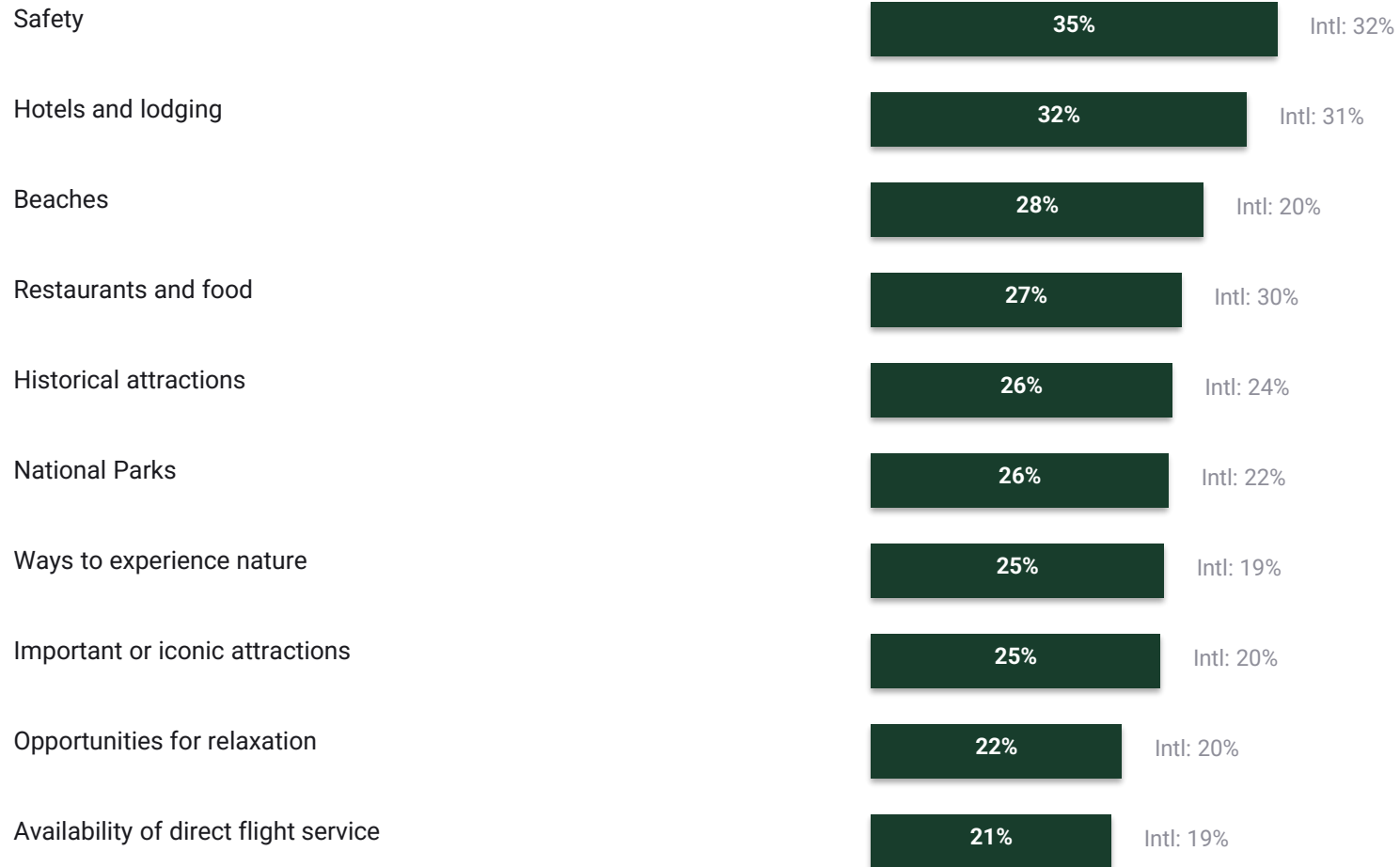
Desired Travel Promotion Tone

Germany



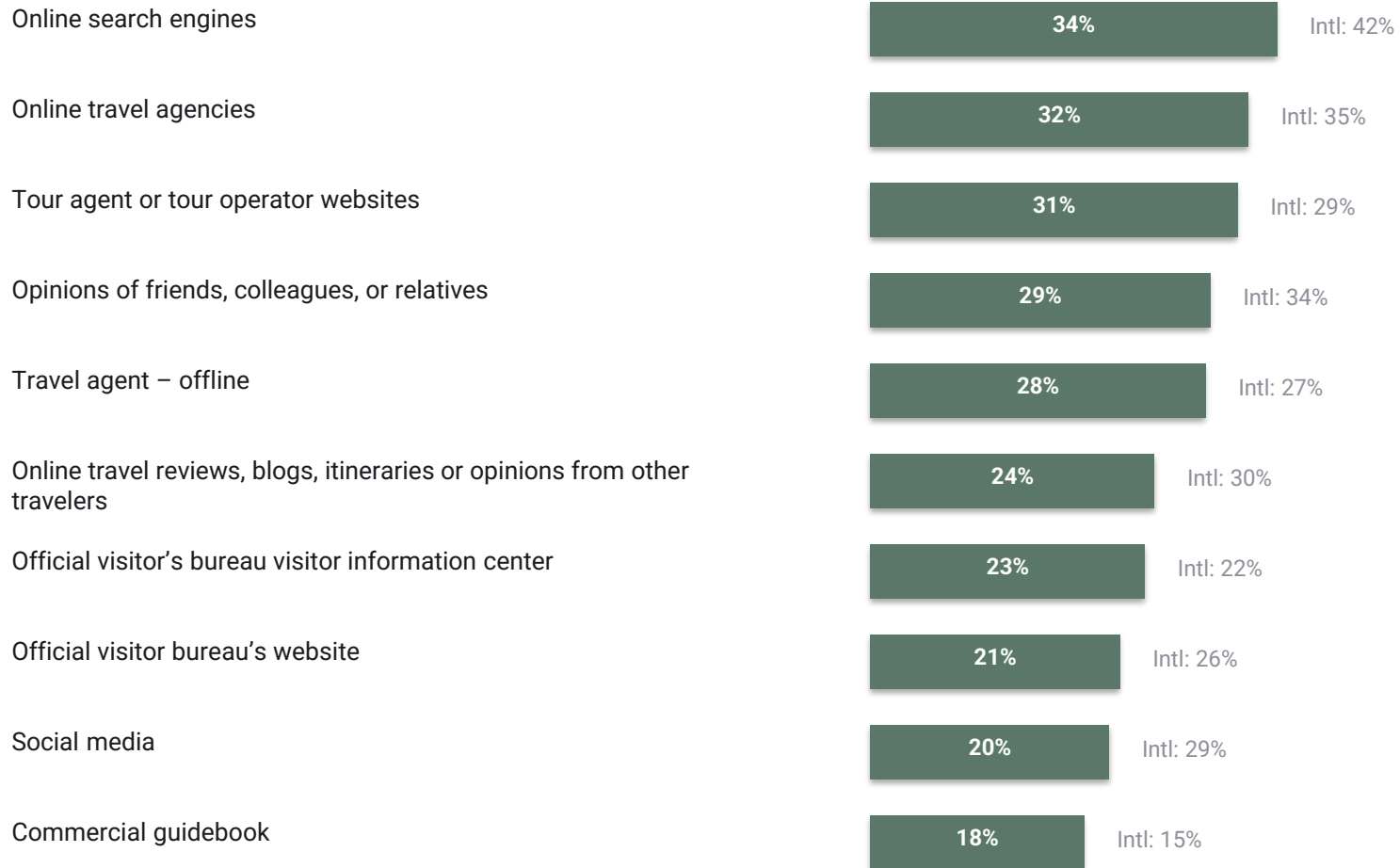
Top Information Sources

Germany



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

Hotels

Intl: \$1,568

\$633

Shopping

Intl: \$1,001

\$677

Dining

Intl: \$826

\$488

Sightseeing

Intl: \$881

\$636

Transport

Intl: \$772

\$4,127

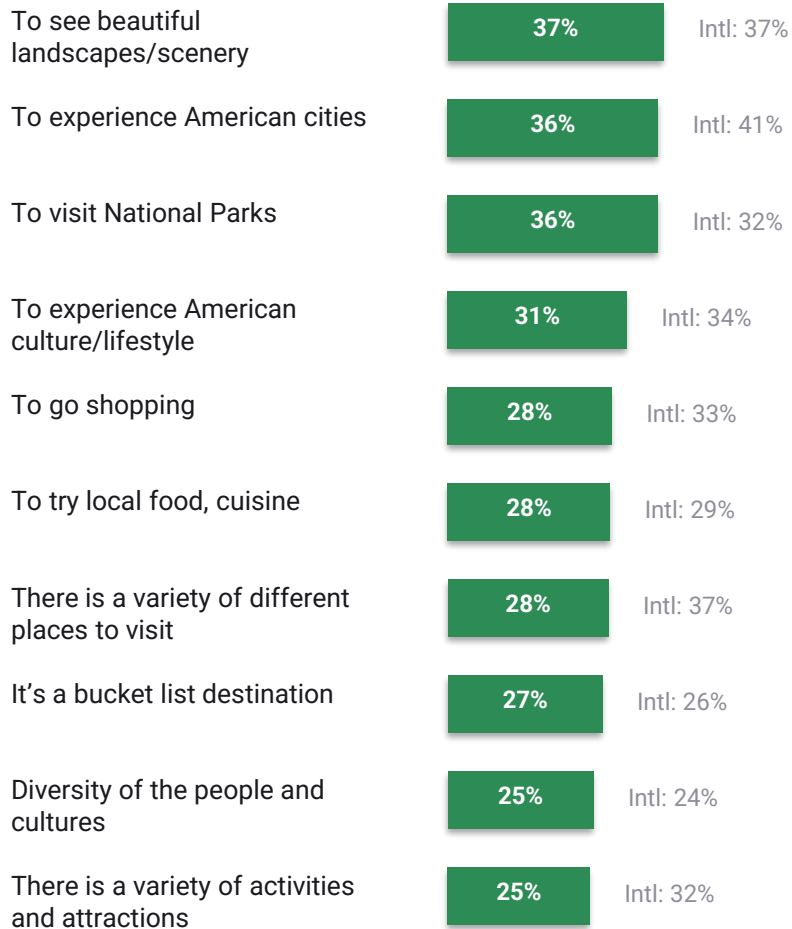
Total

Intl: \$5,049

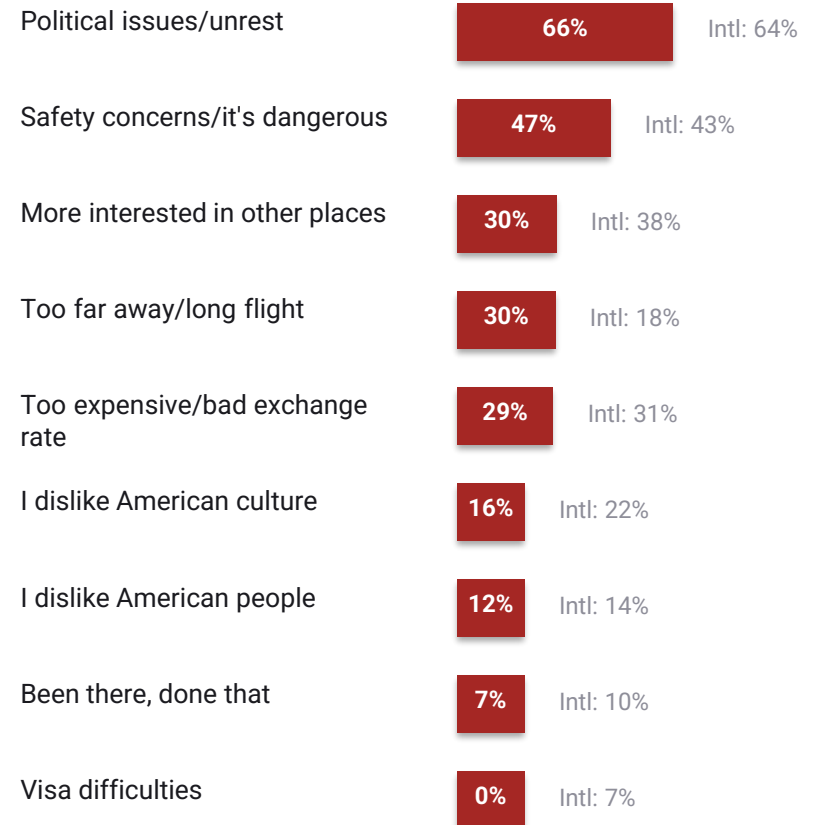
Enablers & Barriers to Visiting

Germany

Enablers

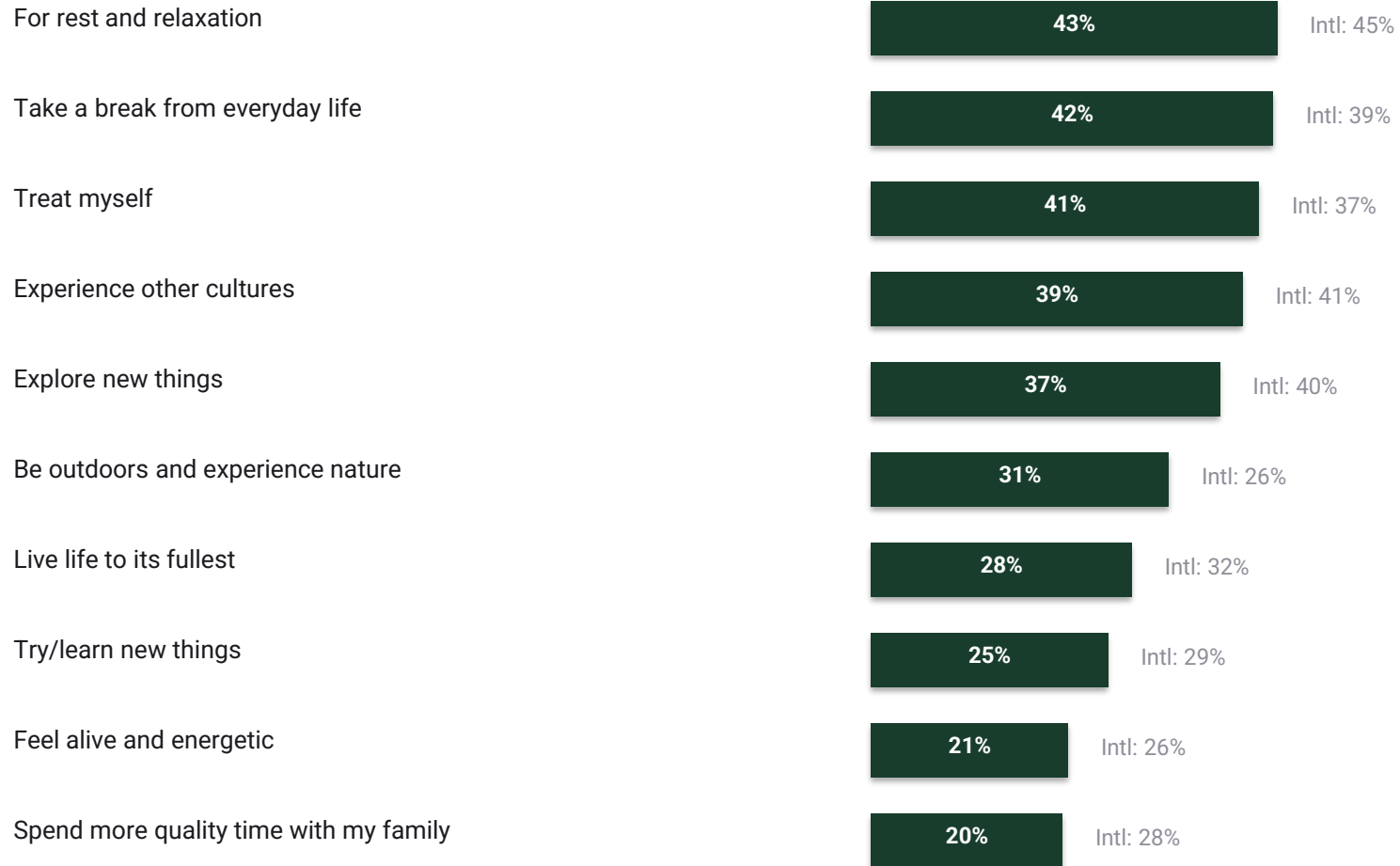


Barriers



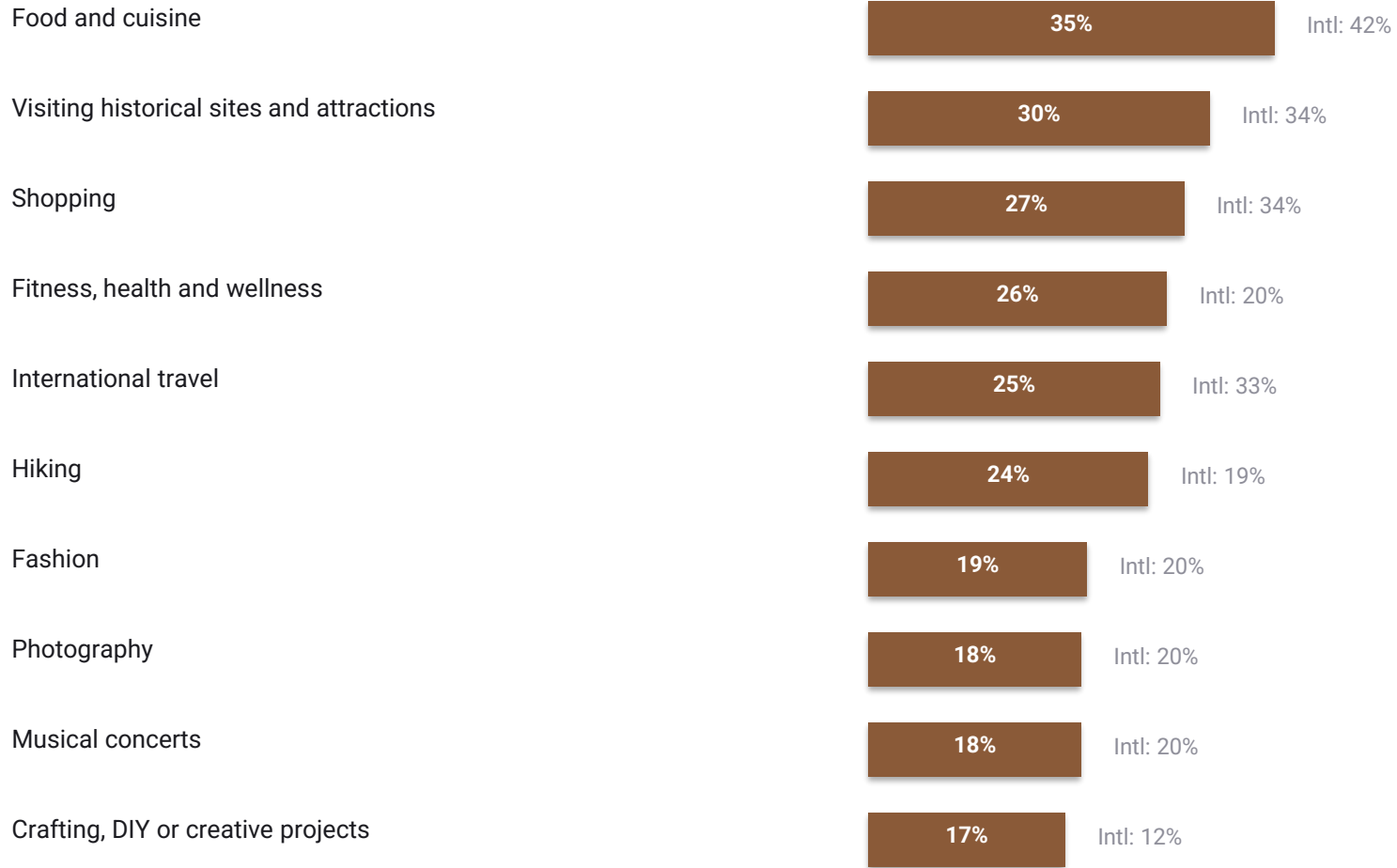
Travel Motivations

Germany



Hobbies & Passions

Germany



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

UNITED KINGDOM

Source Market Analysis | Georgia

#3 by Spending | #3 by Visits

EXPLORE
GEORGIA.
USA

TravelSouth
All Y'all Are Welcome USA

United Kingdom | Key Findings

- 1 2026 Georgia projected spending:** \$143.7M (+1.4% YOY). Projected visitors: 94K (+3.6% YOY). Ranks #3 by spending and #3 by visits among Georgia 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 (3.6%) trails 2015-2019 (4%).
- 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

\$143.7M

2026 Georgia Spending

+1.4% YOY vs. 2025

94K

2026 Georgia Visitors

+3.6% YOY vs. 2025

\$11.9B

2026 USA Spending

+3.3% YOY vs. 2025

5.8M

2026 USA Visitors

+3.5% YOY vs. 2025

\$141.7M

2025 Georgia Spending

+1.8% YOY vs. 2024

90.7K

2025 Georgia Visitors

-2.6% 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

4%

Spending

0.5%

Visits

2023-2027 PROJECTED CAGR

3.6%

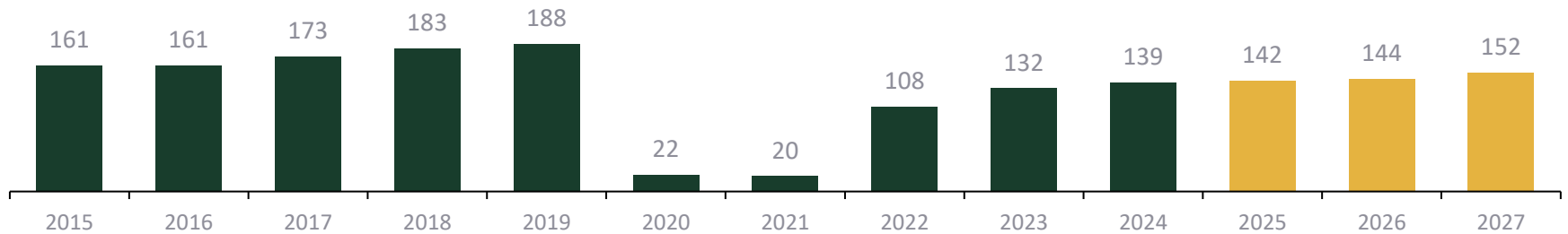
Spending

2%

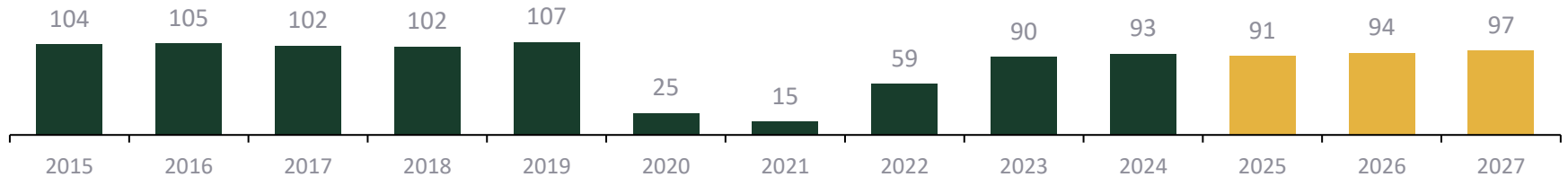
Visits

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%

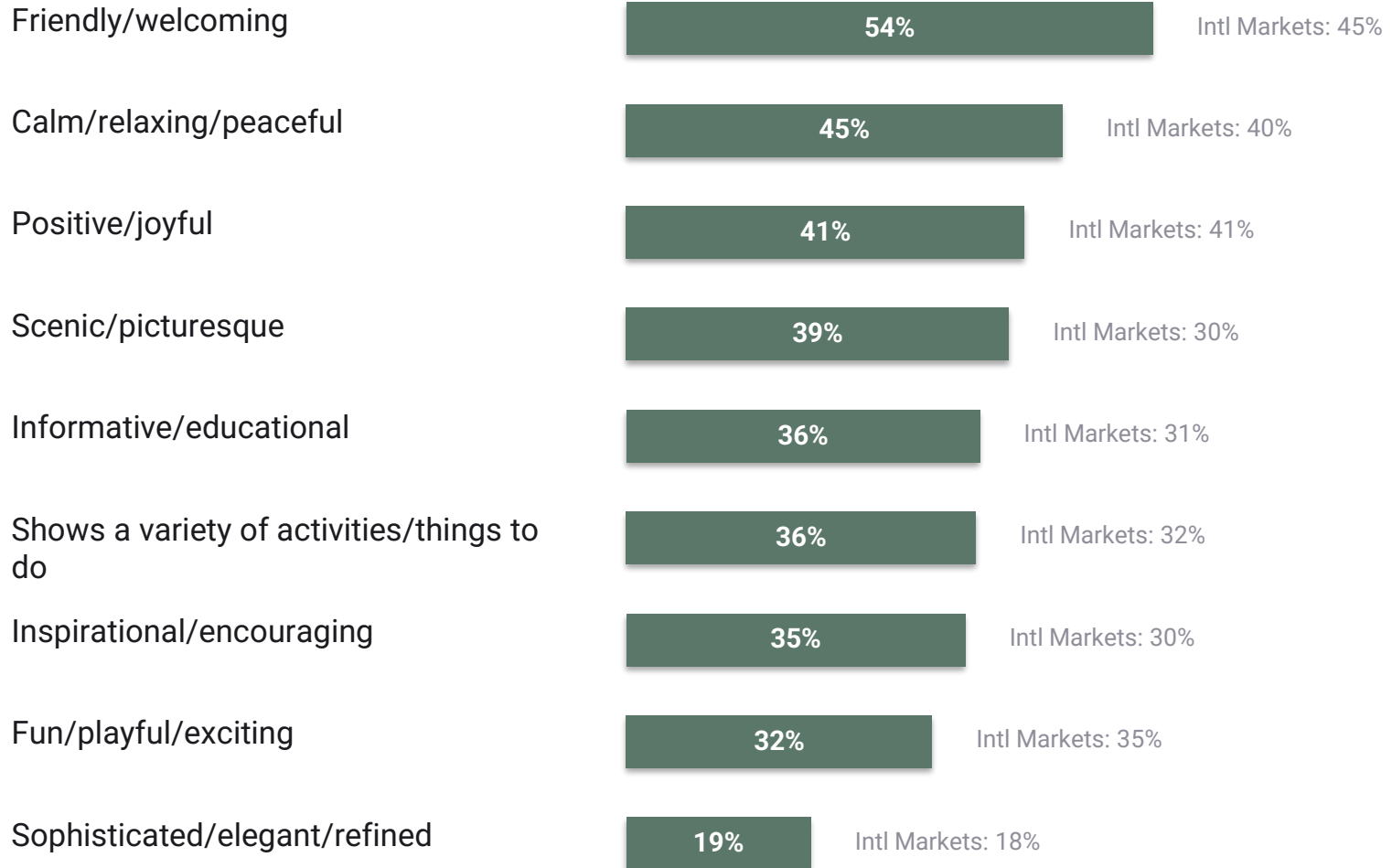
41%

Likely to Visit (5yr)

Intl Markets: 41%

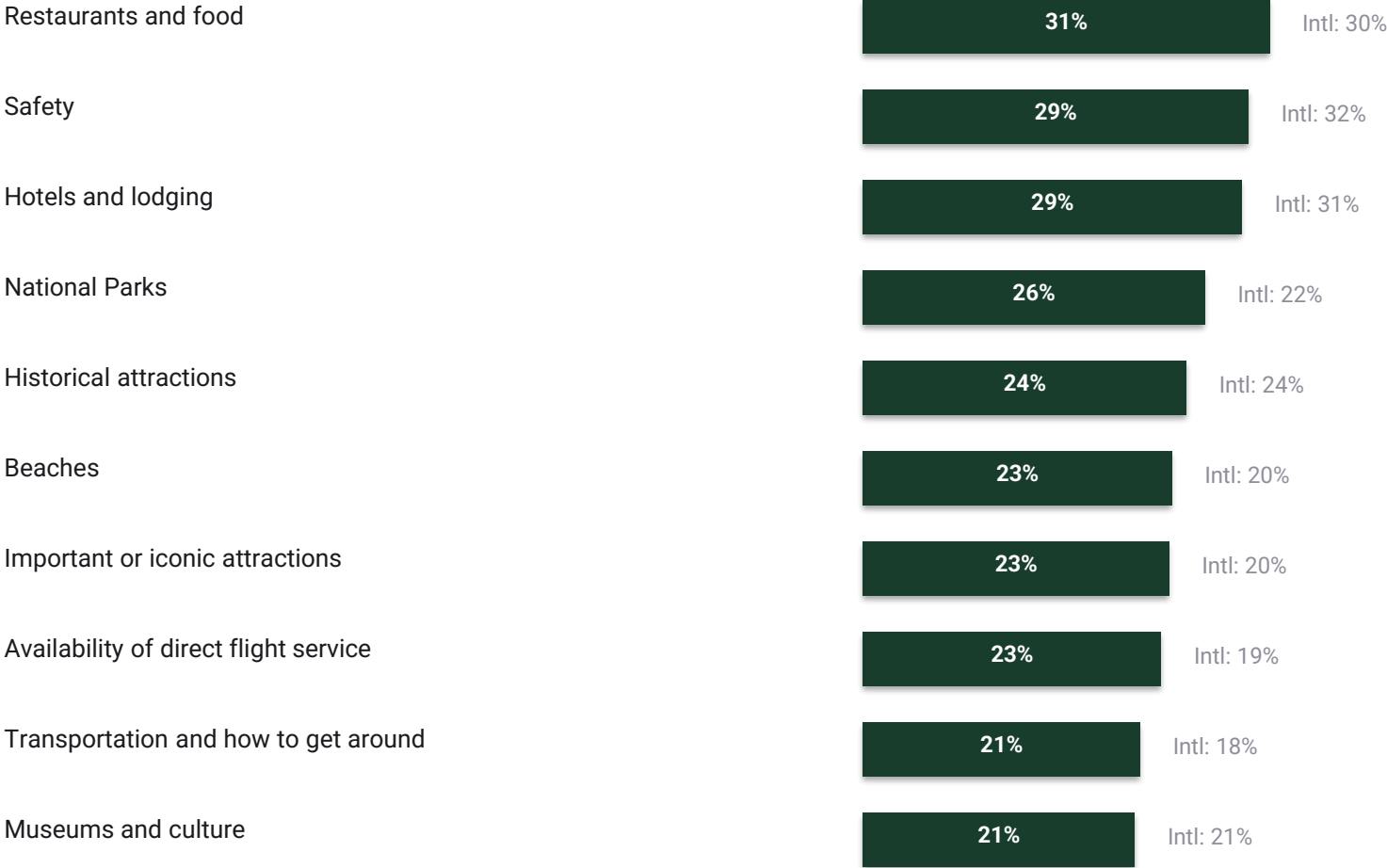
Desired Travel Promotion Tone

United Kingdom



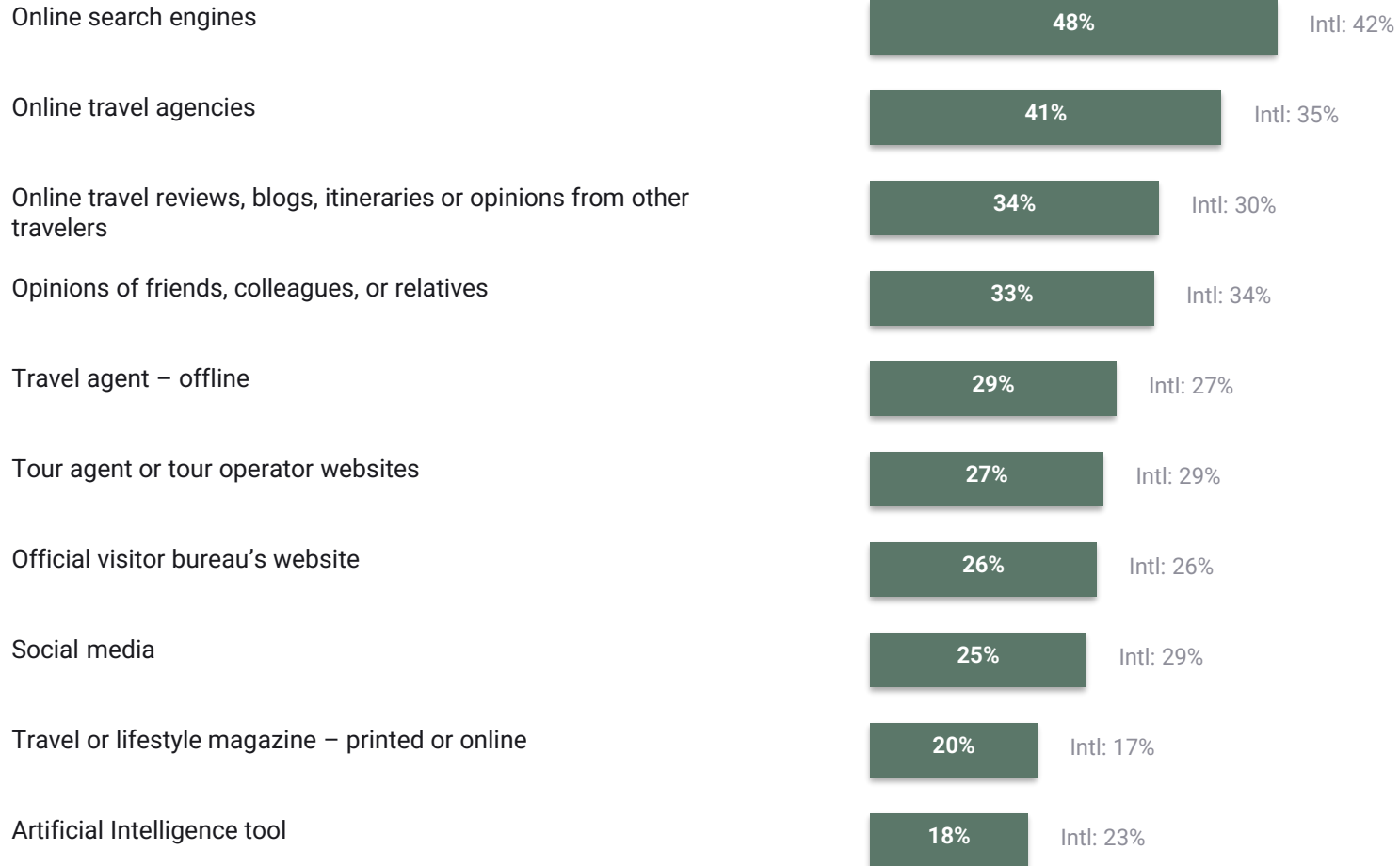
Top Information Sources

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

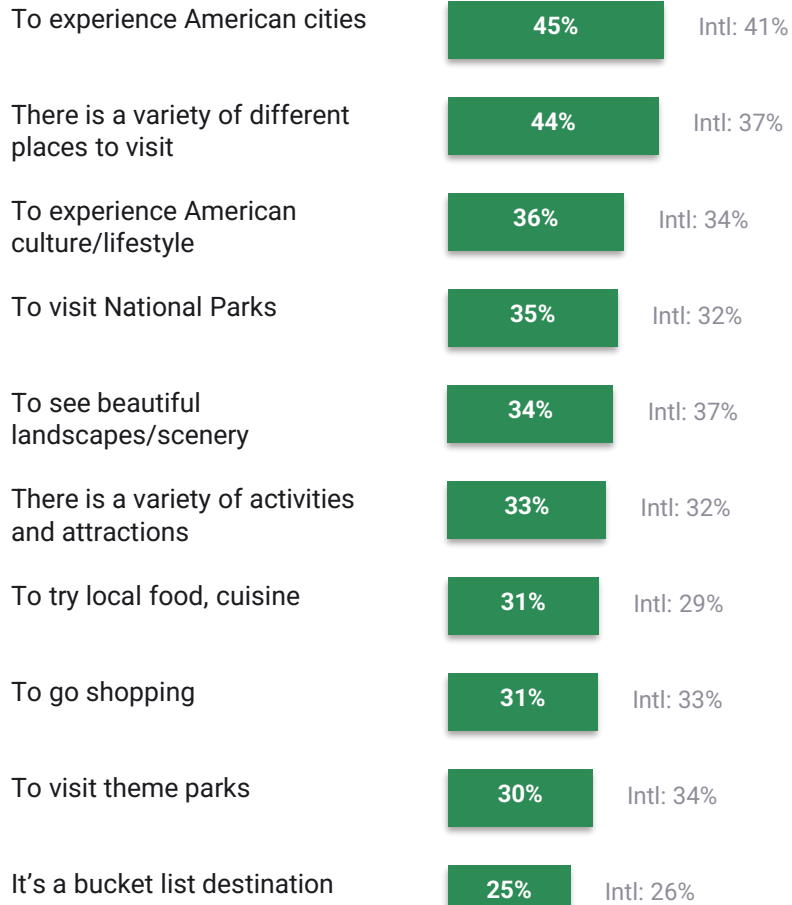
Total

Intl: \$5,049

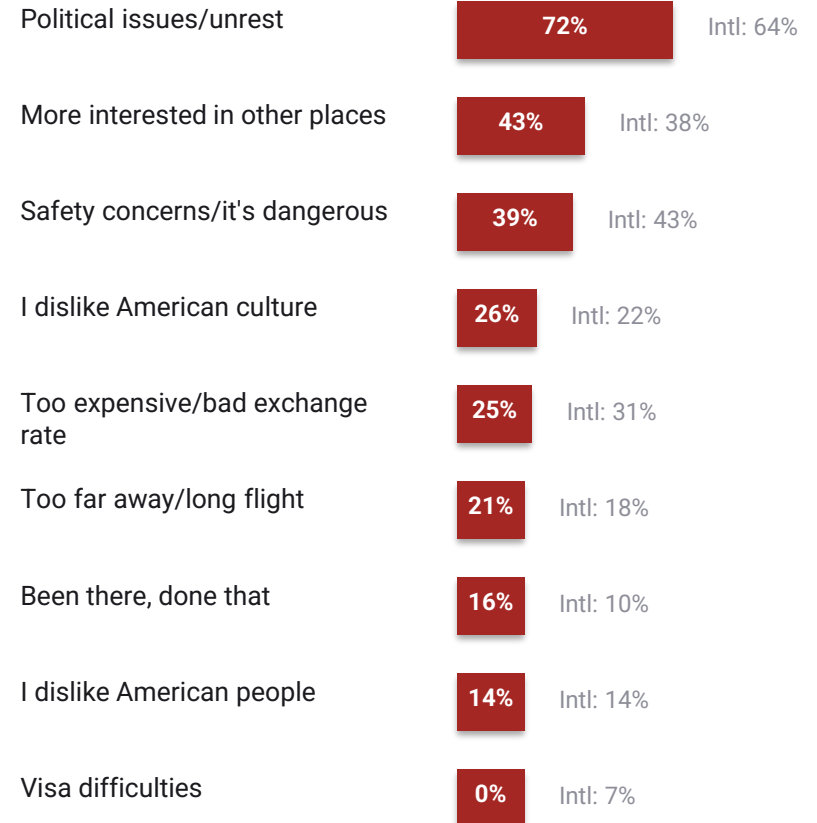
Enablers & Barriers to Visiting

United Kingdom

Enablers

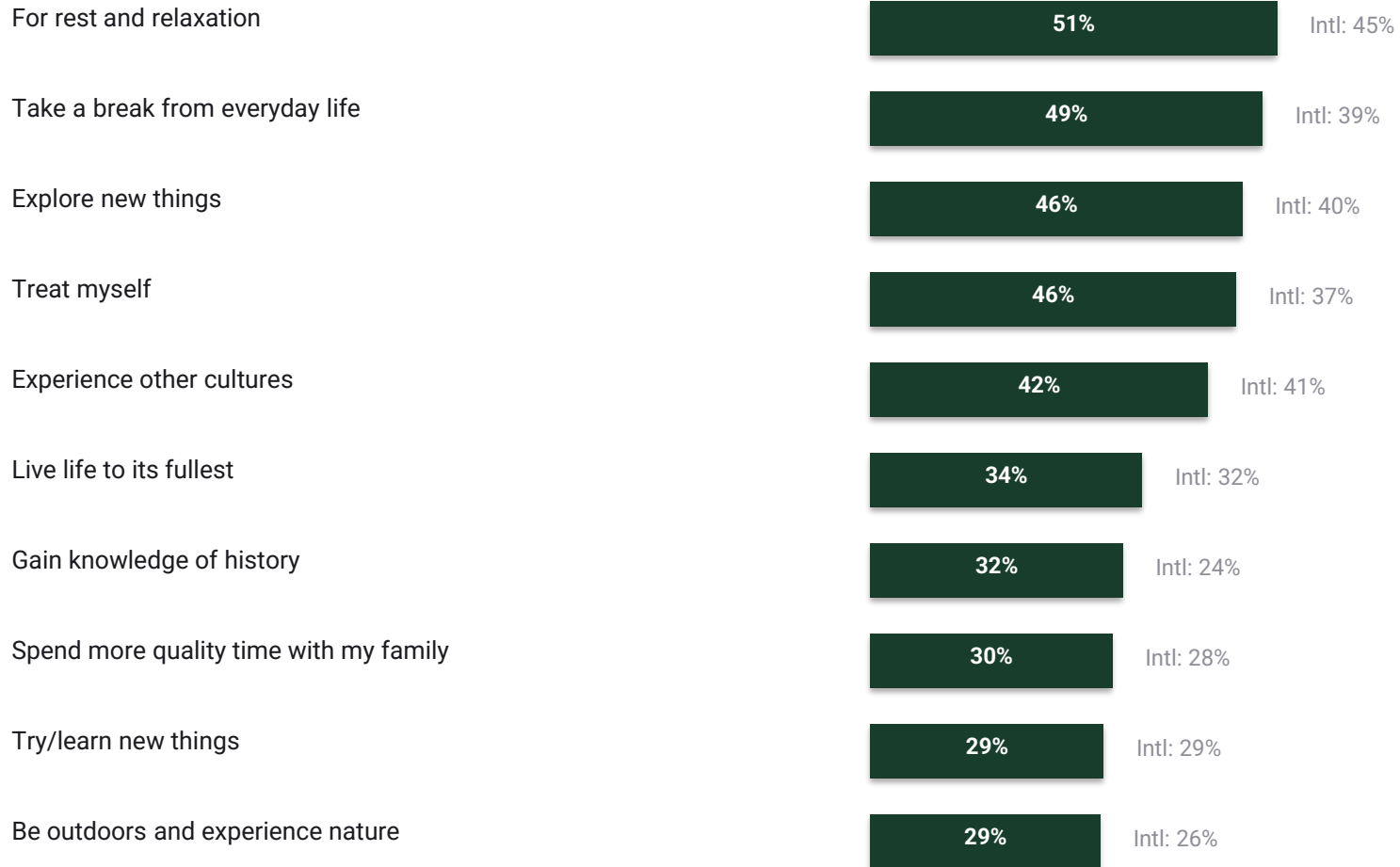


Barriers



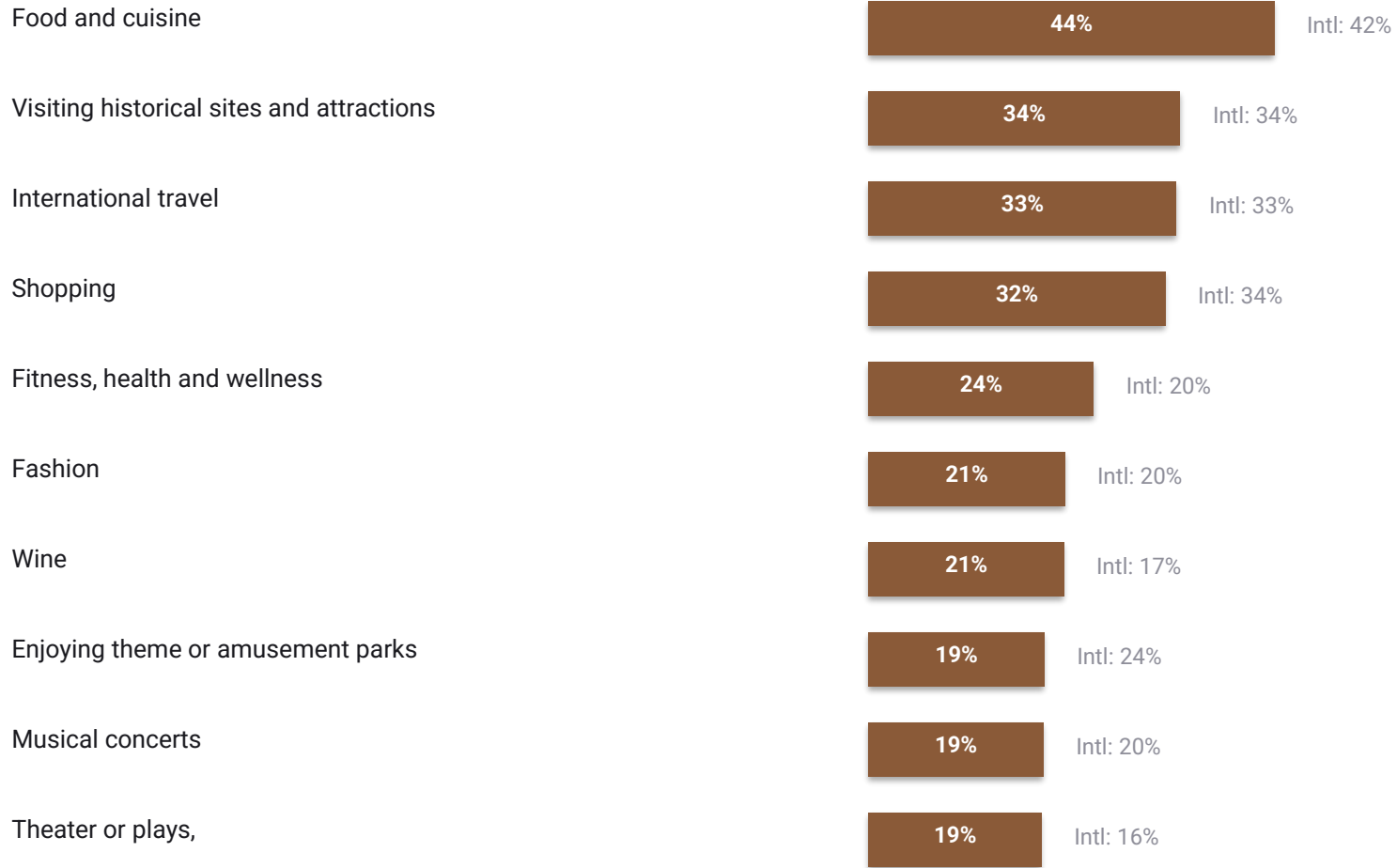
Travel Motivations

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 | Georgia

#4 by Spending | #2 by Visits

EXPLORE
GEORGIA.
USA

TravelSouth
All Y'all Are Welcome USA

India | Key Findings

- 1 2026 Georgia projected spending:** \$129.6M (+4.9% YOY). Projected visitors: 96.5K (+0.6% YOY). Ranks #4 by spending and #2 by visits among Georgia 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 (9.7%) exceeds 2015-2019 (4.7%).
- 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

\$129.6M

2026 Georgia Spending

+4.9% YOY vs. 2025

96.5K

2026 Georgia Visitors

+0.6% YOY vs. 2025

\$7.1B

2026 USA Spending

+5.7% YOY vs. 2025

3.3M

2026 USA Visitors

+2.3% YOY vs. 2025

\$123.6M

2025 Georgia Spending

-4.9% YOY vs. 2024

95.9K

2025 Georgia Visitors

+4.2% 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

4.7%

Spending

3.7%

Visits

2023-2027 PROJECTED CAGR

9.7%

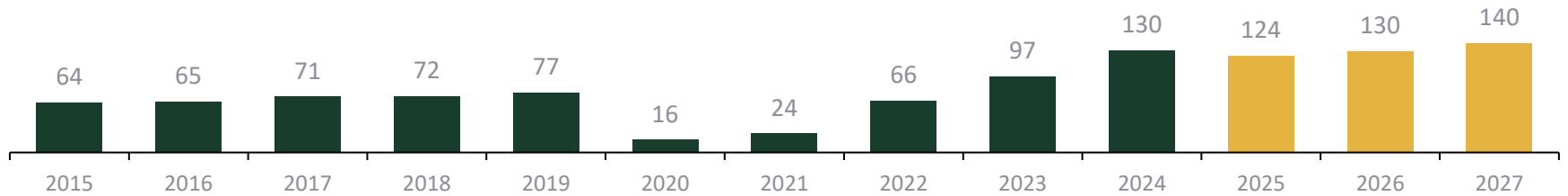
Spending

4.6%

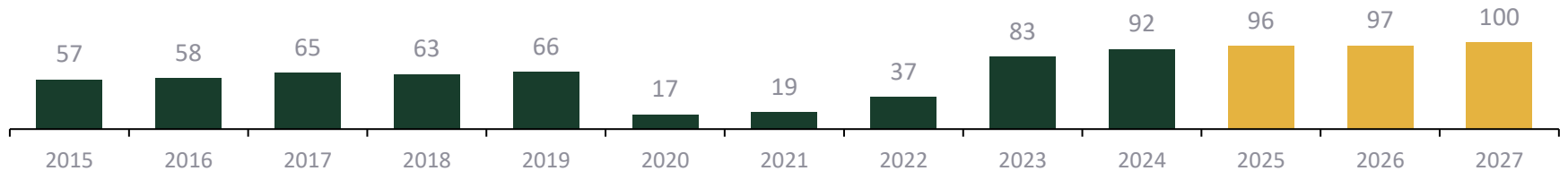
Visits

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%

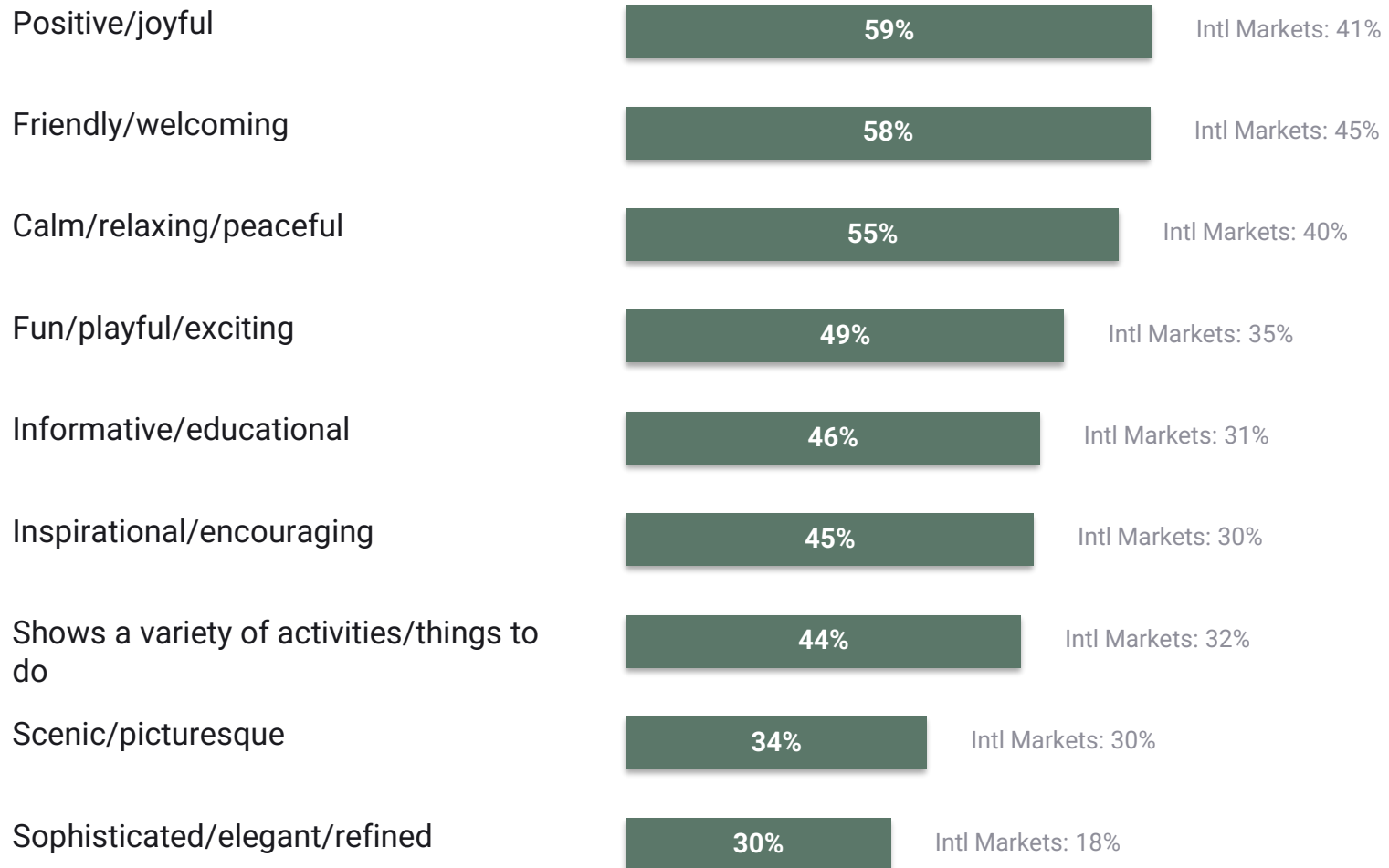
74%

Likely to Visit (5yr)

Intl Markets: 41%

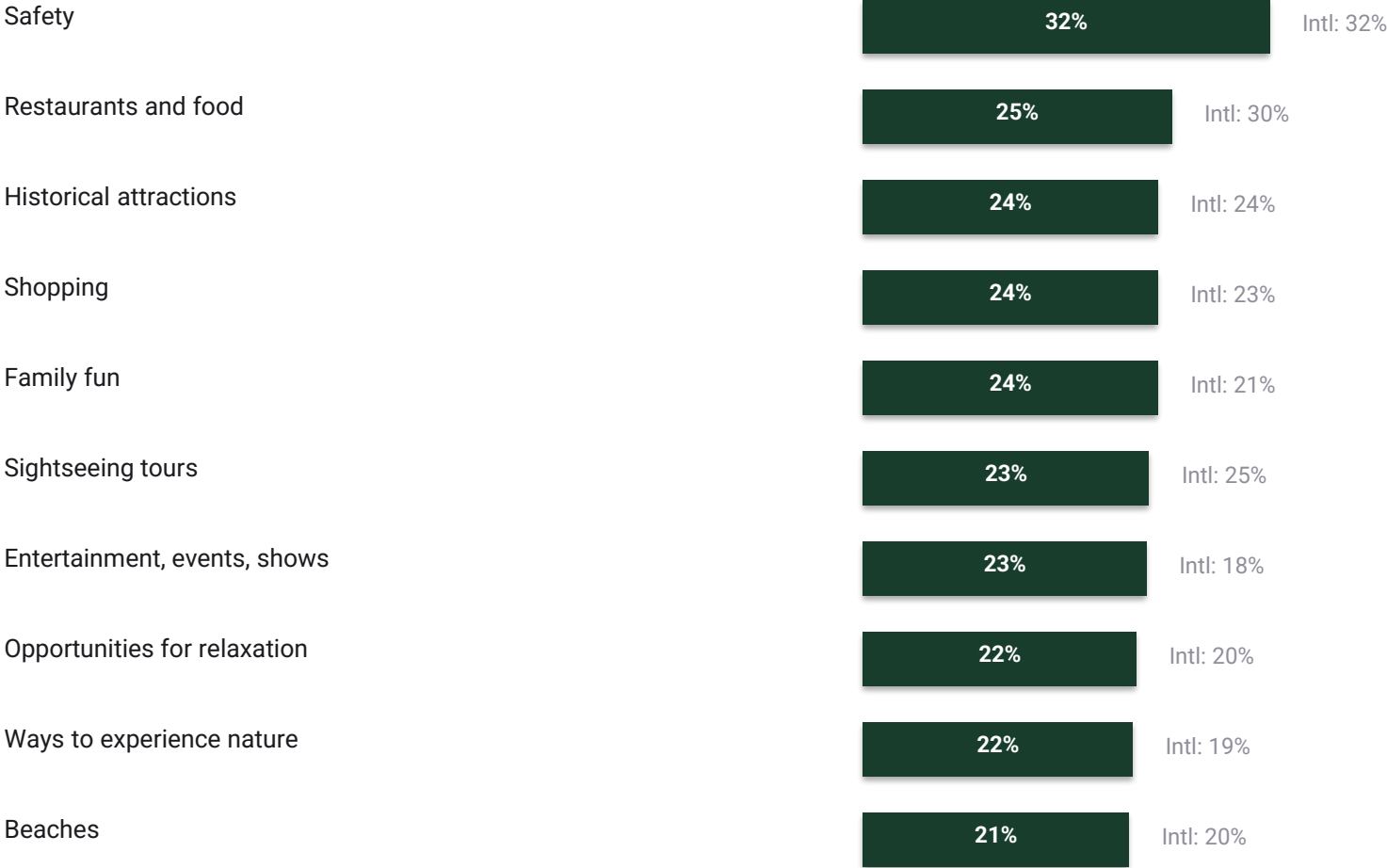
Desired Travel Promotion Tone

India



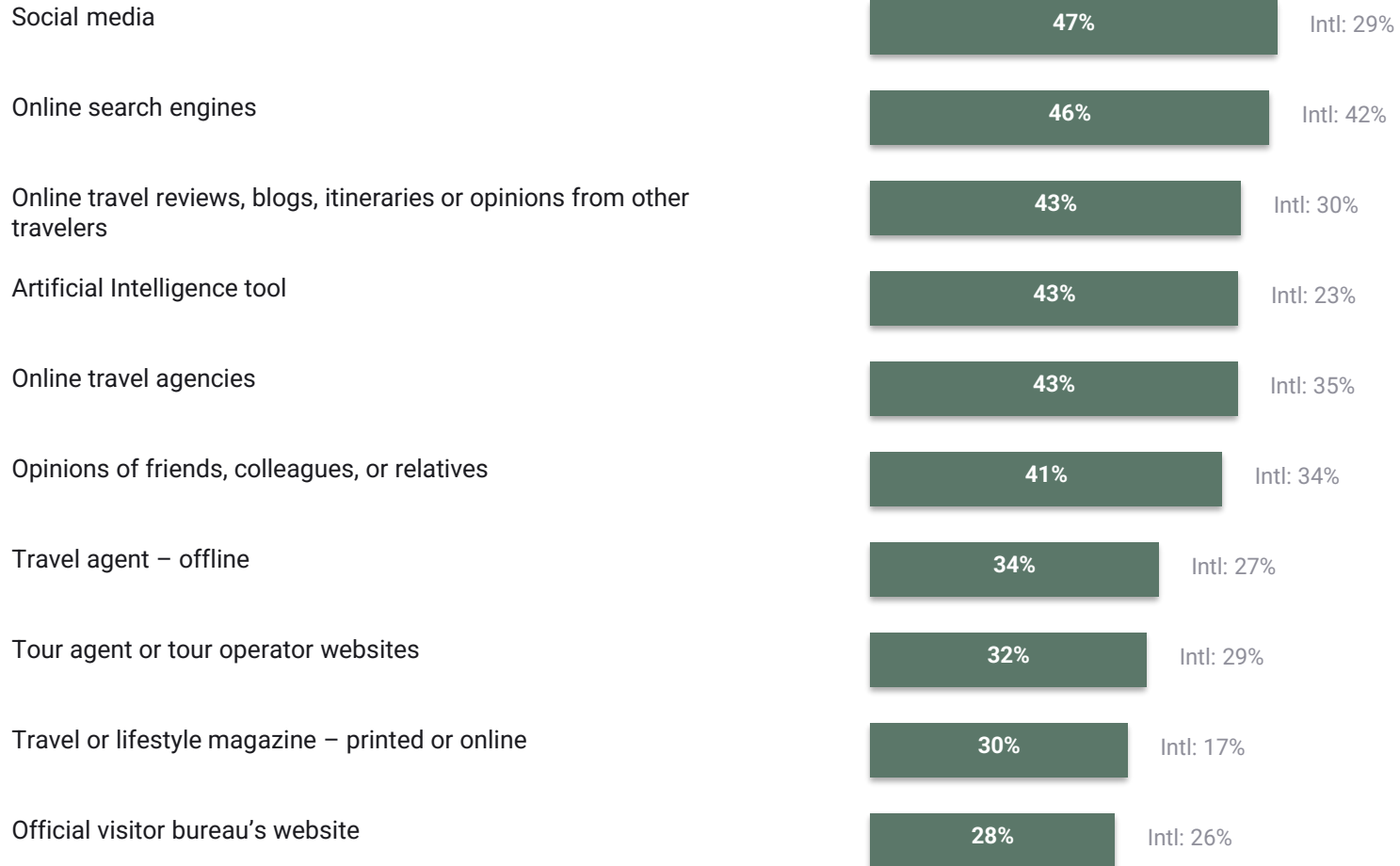
Top Information Sources

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

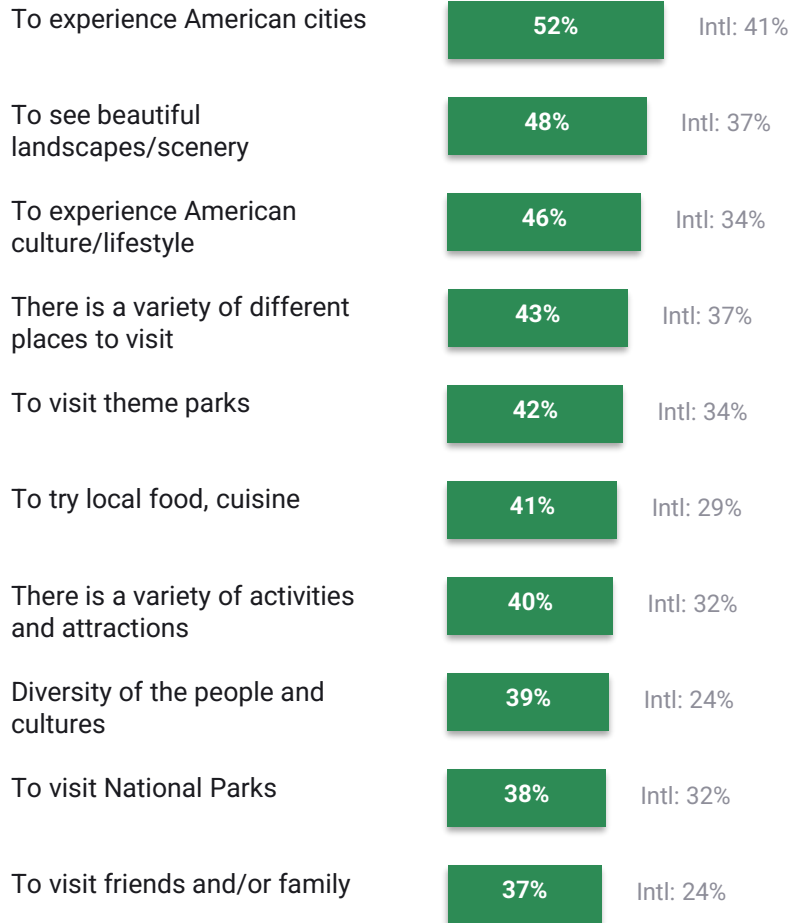
Total

Intl: \$5,049

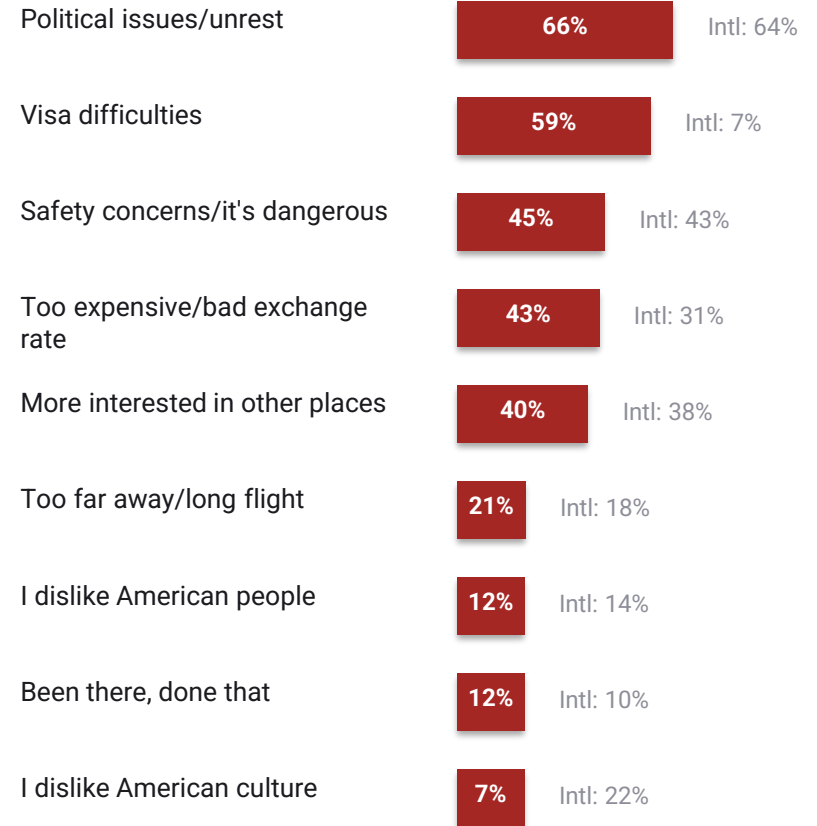
Enablers & Barriers to Visiting

India

Enablers

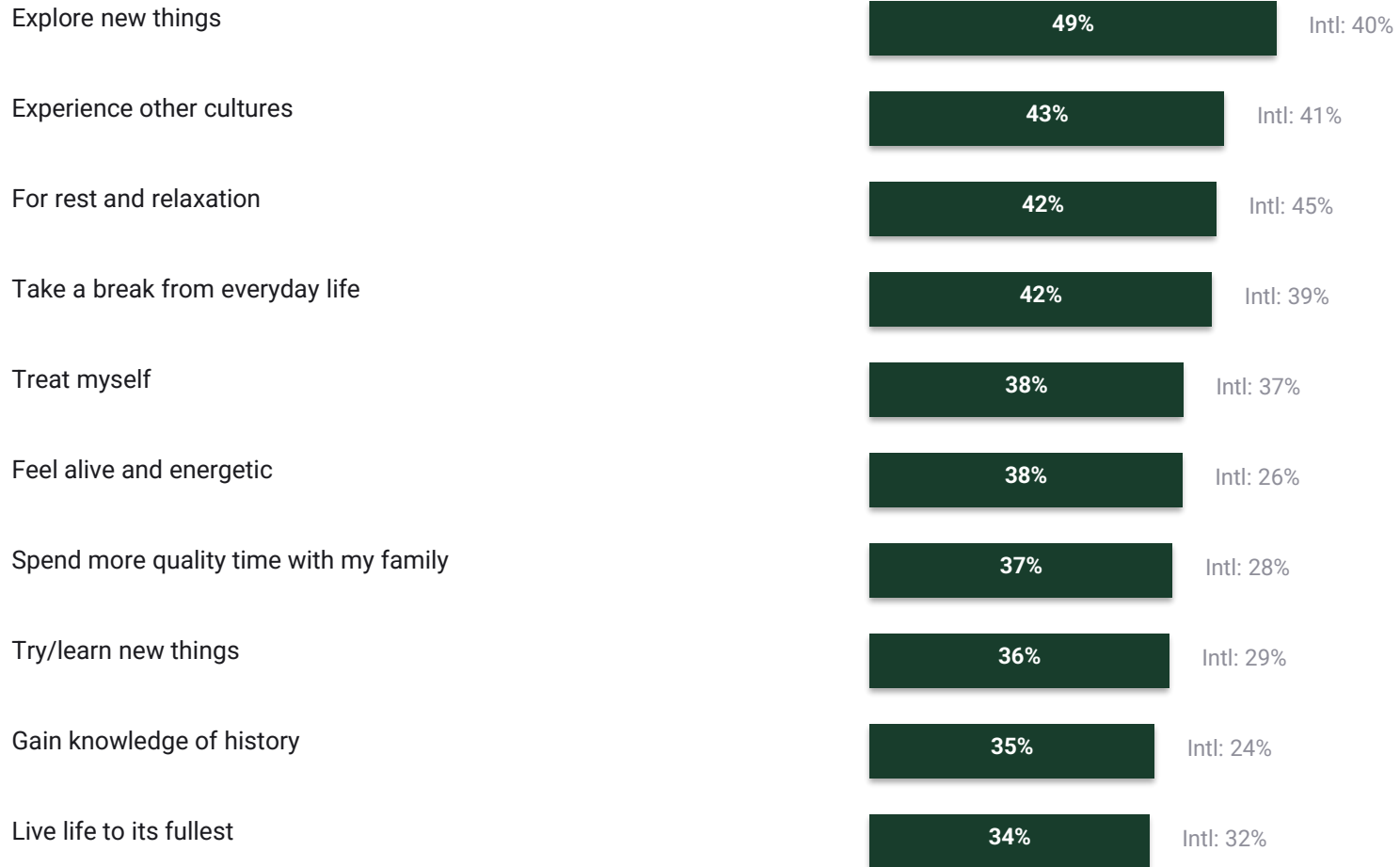


Barriers



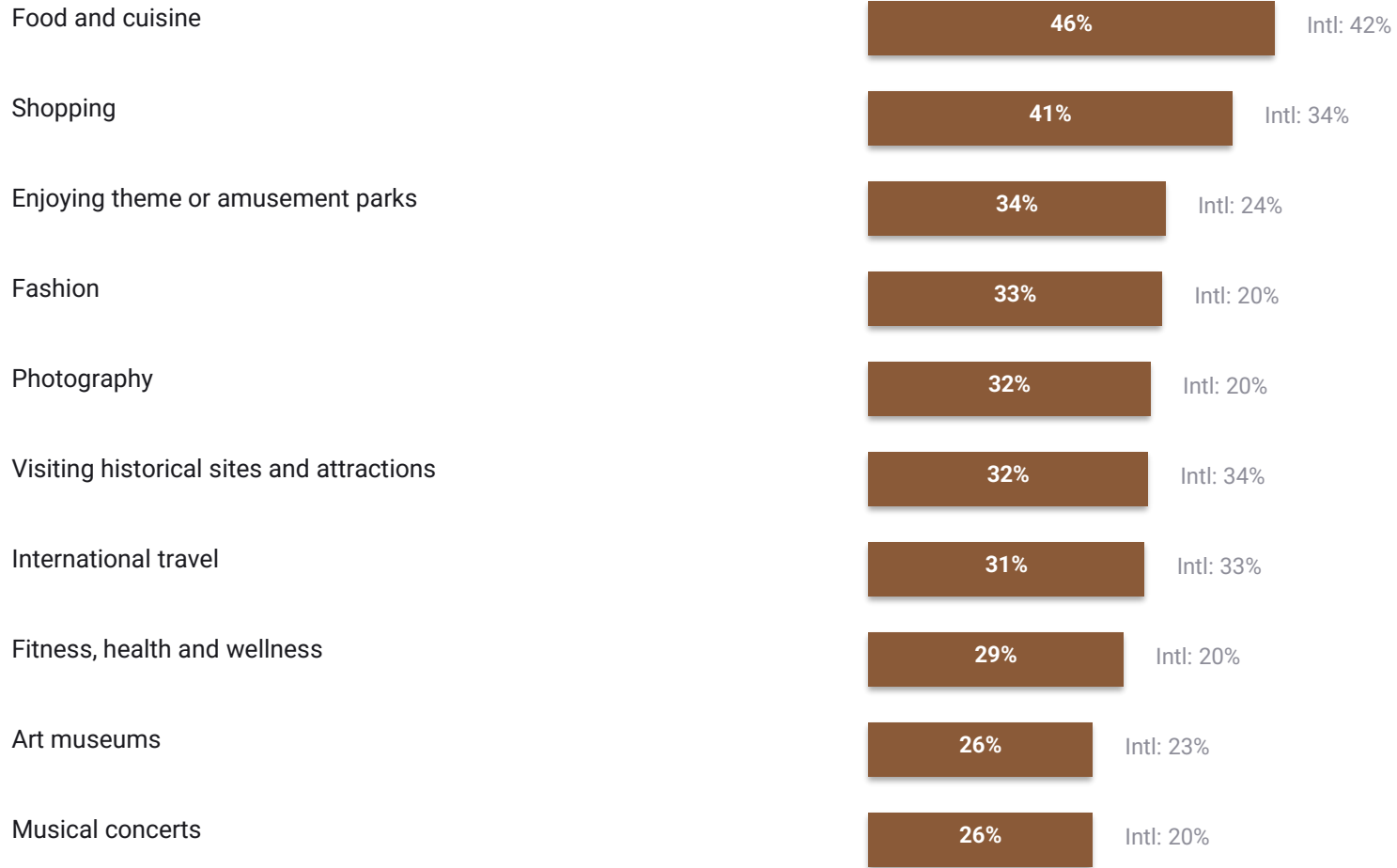
Travel Motivations

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

CHINA

Source Market Analysis | Georgia

#5 by Spending | #8 by Visits

EXPLORE
GEORGIA.
USA

TravelSouth
All Y'all Are Welcome USA

China | Key Findings

- 1 2026 Georgia projected spending:** \$122.9M (+4.8% YOY). Projected visitors: 43.8K (+6.6% YOY). Ranks #5 by spending and #8 by visits among Georgia 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 (26.9%) exceeds 2015-2019 (-1.1%).
- 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%)

China

\$122.9M

2026 Georgia Spending

+4.8% YOY vs. 2025

43.8K

2026 Georgia Visitors

+6.6% YOY vs. 2025

\$8.8B

2026 USA Spending

+4.8% YOY vs. 2025

2.8M

2026 USA Visitors

+4.8% YOY vs. 2025

\$117.3M

2025 Georgia Spending

+5.5% YOY vs. 2024

41.1K

2025 Georgia Visitors

-0.5% YOY vs. 2024

\$8.4B

2025 USA Spending

+0.2% YOY vs. 2024

2.6M

2025 USA Visitors

-3.2% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

-1.1%

Spending

1.5%

Visits

2023-2027 PROJECTED CAGR

26.9%

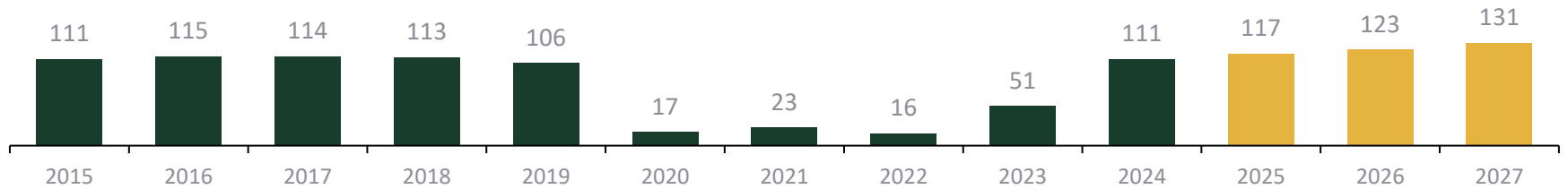
Spending

16%

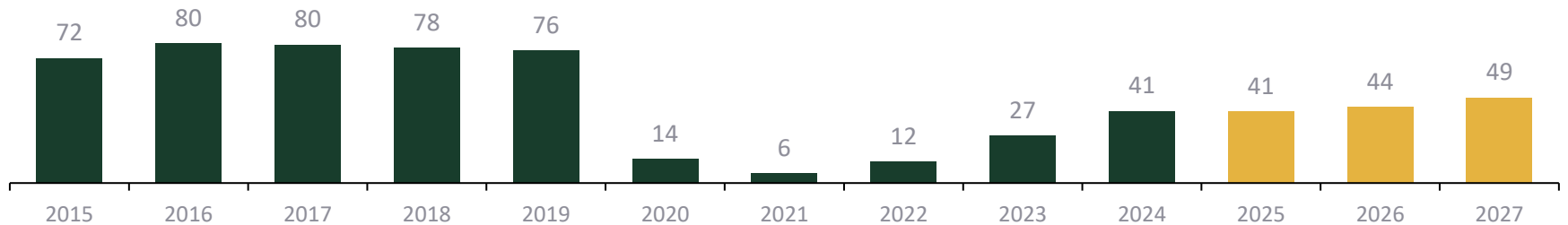
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

China

77%

Familiarity

Intl Markets: 67%

83%

Appeal

Intl Markets: 75%

47%

Promotional Buzz

Intl Markets: 29%

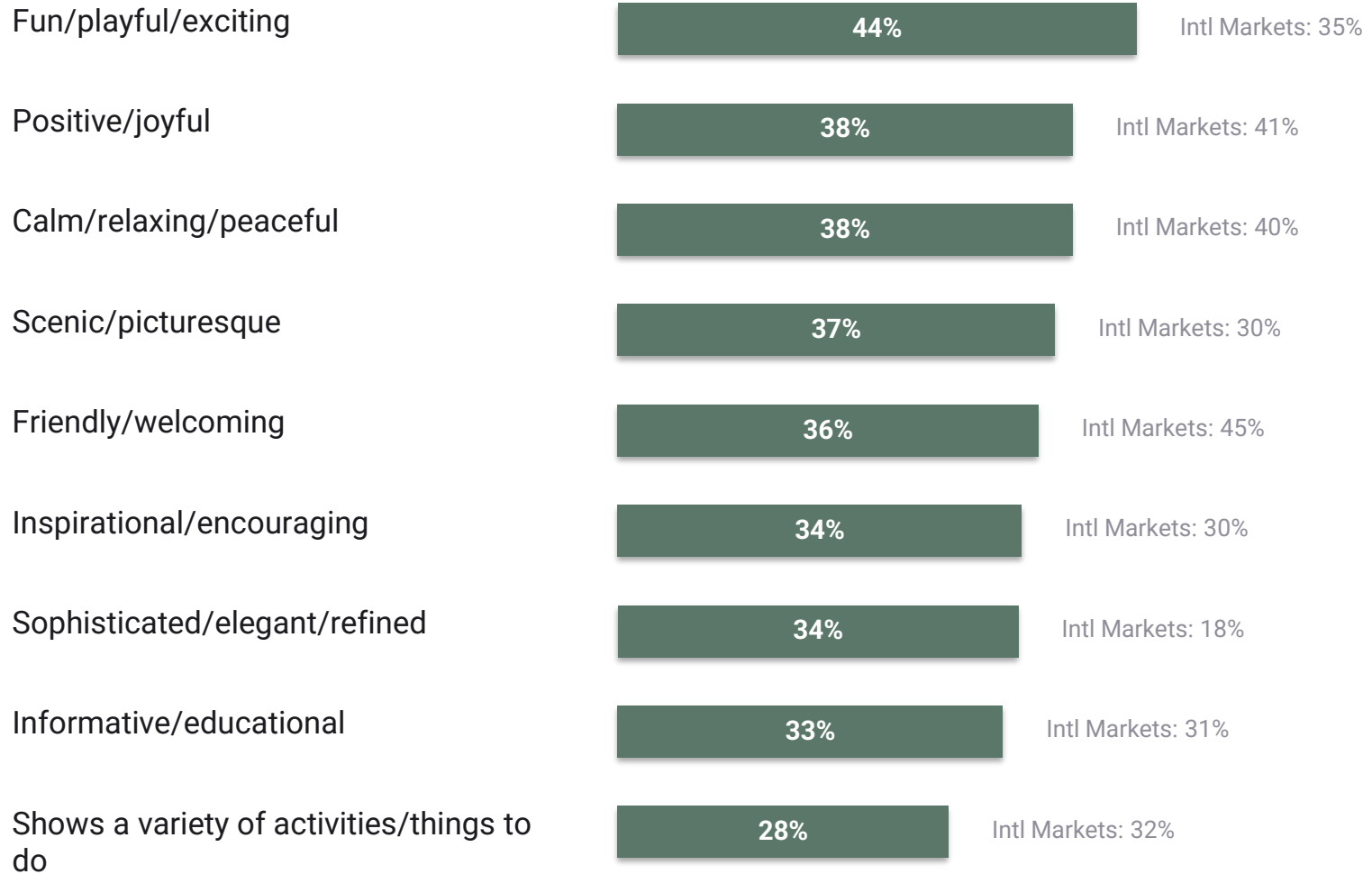
54%

Likely to Visit (5yr)

Intl Markets: 41%

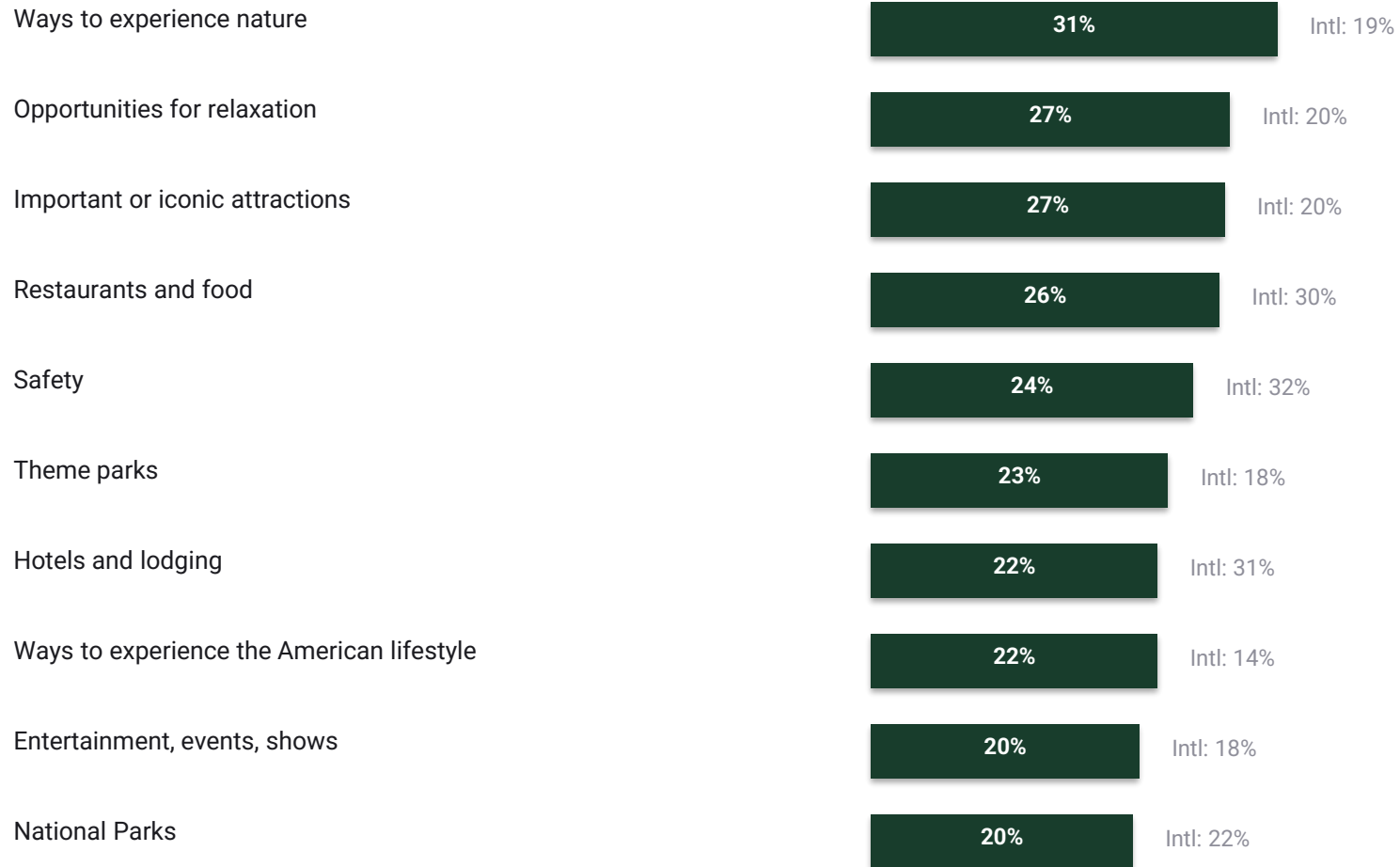
Desired Travel Promotion Tone

China



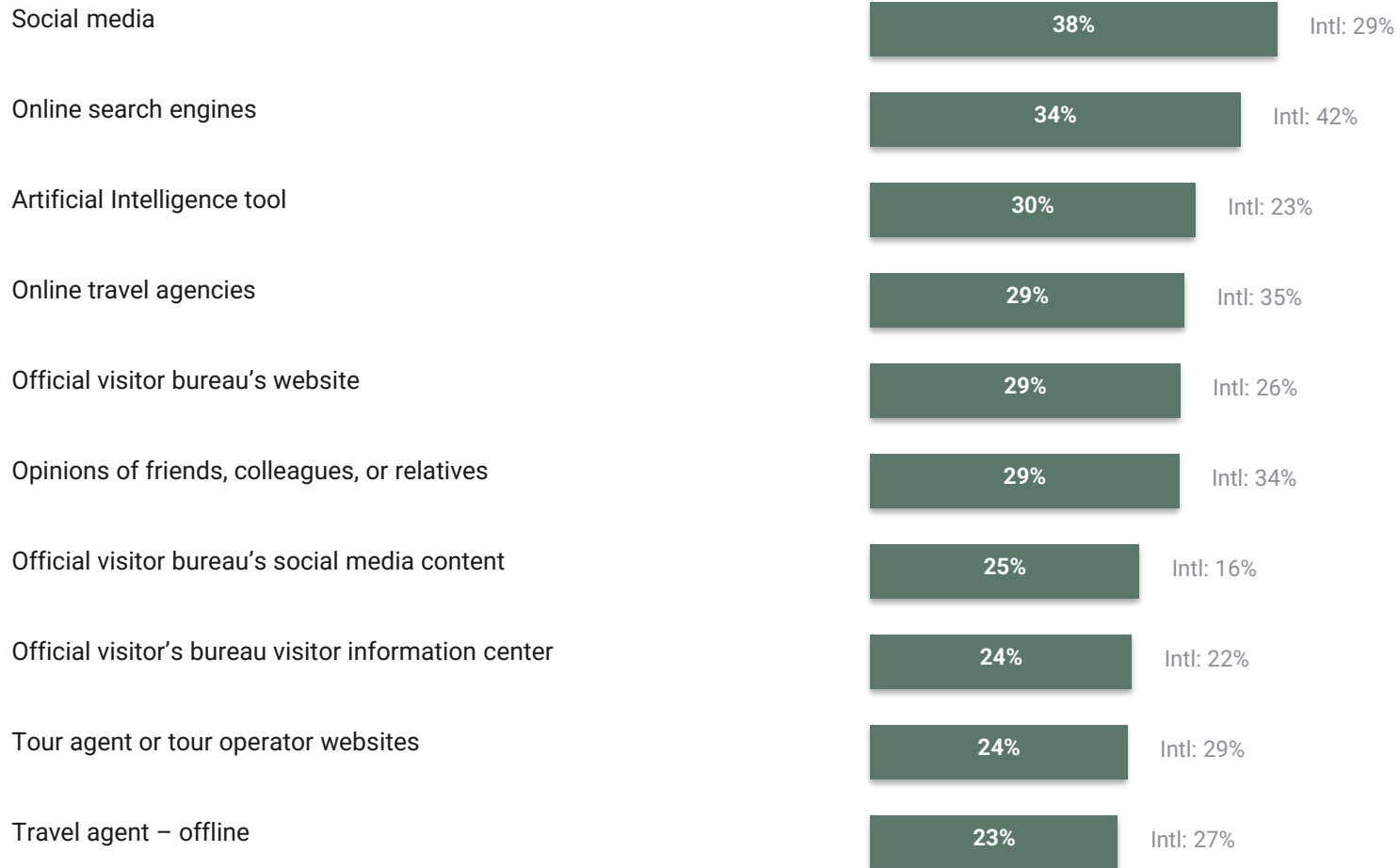
Top Information Sources

China



Planning Resources

China



U.S. Travel Planning & Budget

China

U.S. Trip Planning

51%

Likely to Visit US (2yr)

Intl Markets: 36%

10 wks

Planning Window

Intl Markets: 14 wks

7 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

10.2

Avg Days in the U.S.

Intl Markets: 12.3

3.0

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

\$1,714

Hotels

Intl: \$1,568

\$2,743

Shopping

Intl: \$1,001

\$1,382

Dining

Intl: \$826

\$1,734

Sightseeing

Intl: \$881

\$1,098

Transport

Intl: \$772

\$8,672

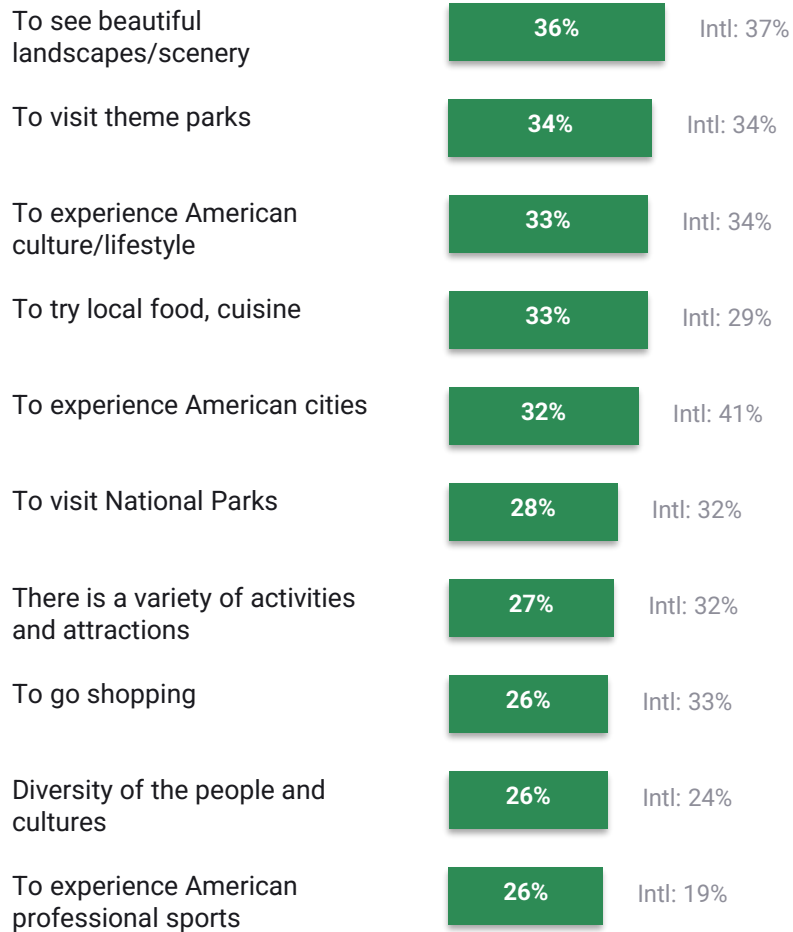
Total

Intl: \$5,049

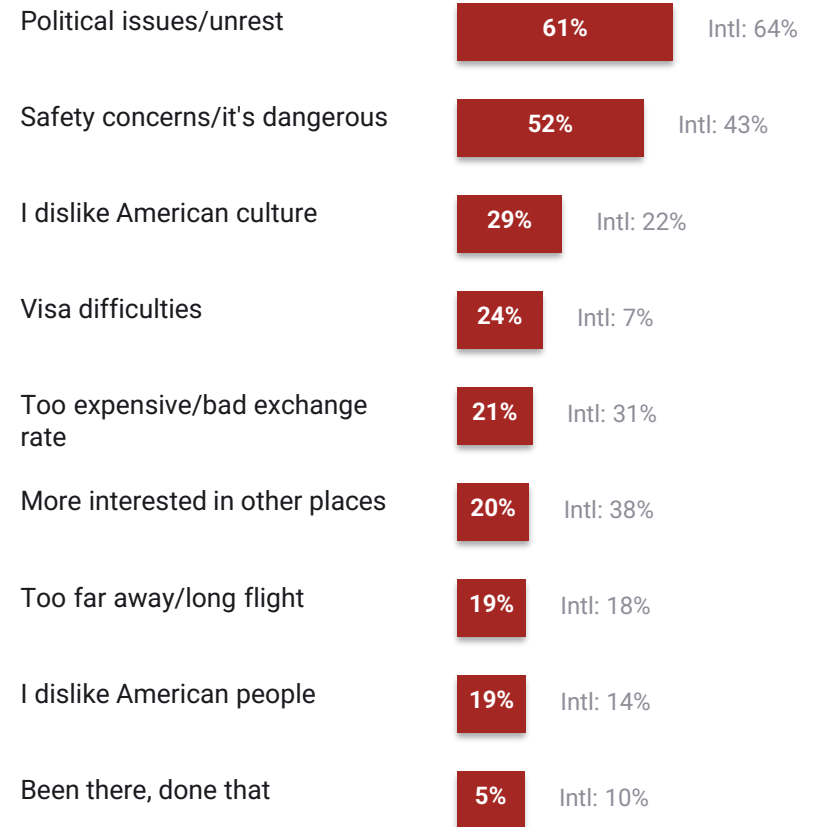
Enablers & Barriers to Visiting

China

Enablers

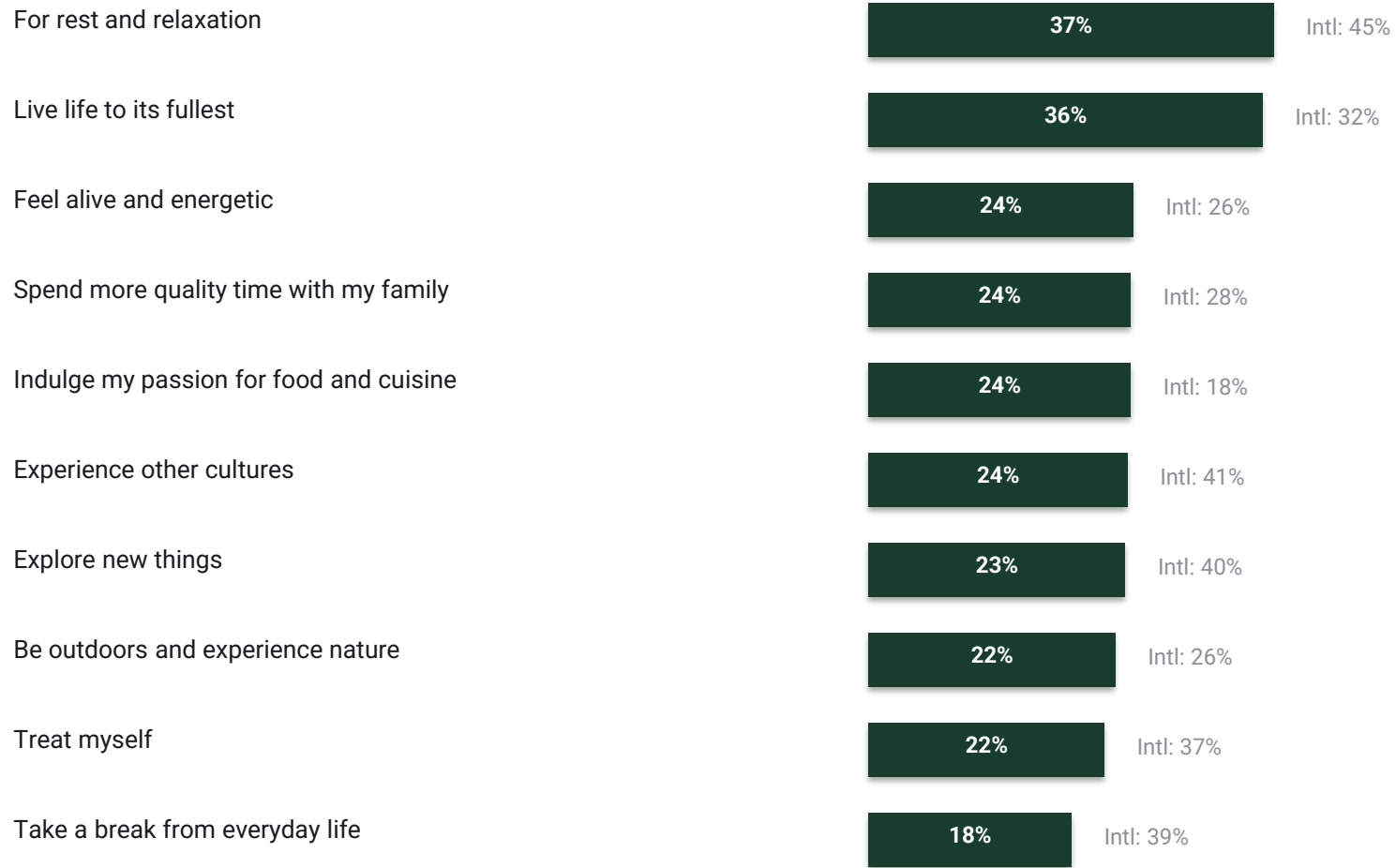


Barriers



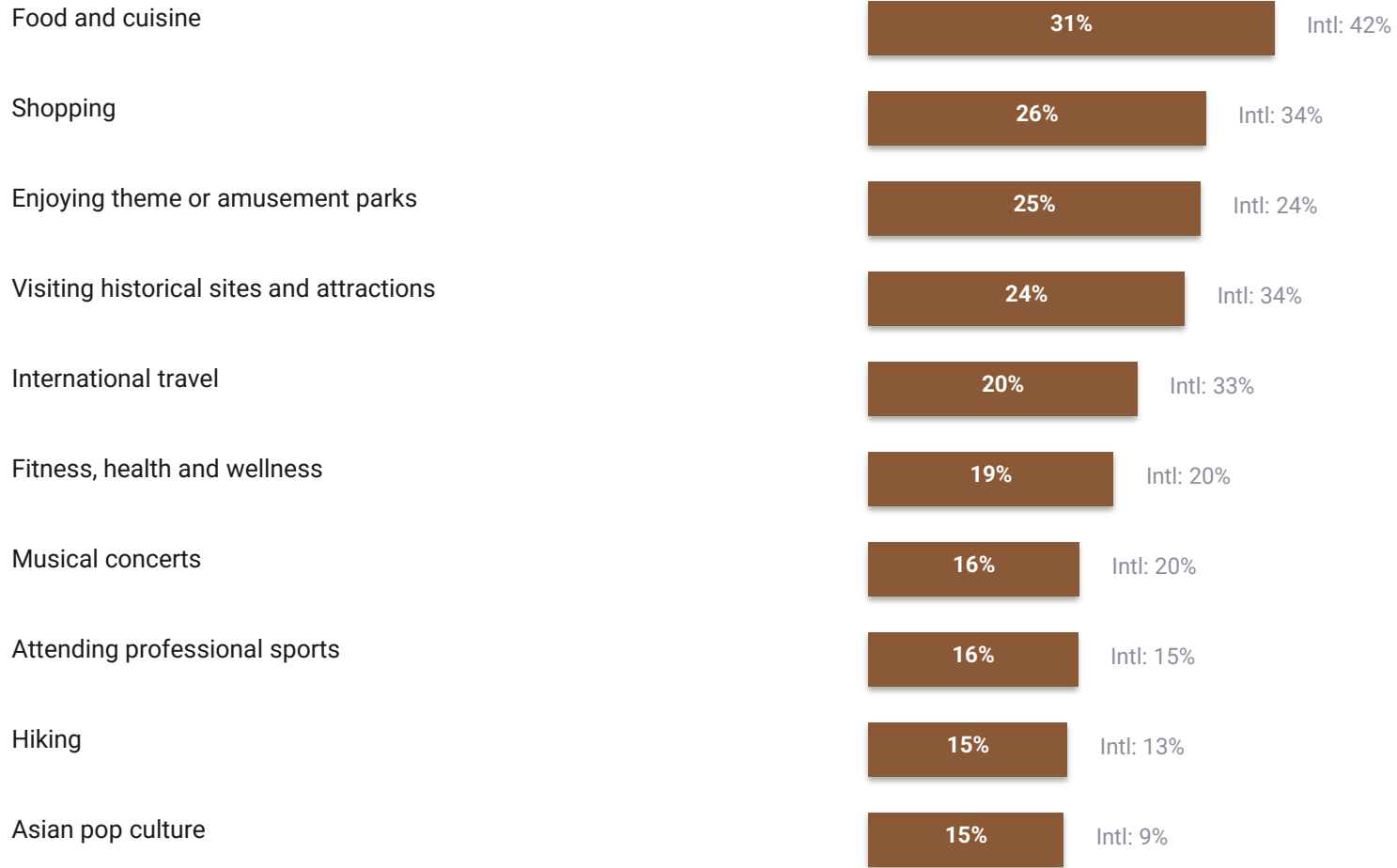
Travel Motivations

China



Hobbies & Passions

China



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.

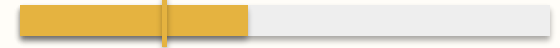
47%



Intl: 34%

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

43%



Intl: 27%

China

Intl Markets



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.