MISSOURI

International Visitor Profile

TravelSouth USA
All Y'all Are Welcome

Key Findings

1. **2026 projected spending:** $439.5M (+6.2% YOY). Projected visitors: 343.3K (+4.4% YOY).
2. **Top 10 Source Markets by Spending:** UK + Ireland ($65.6M), China ($52.5M), Canada ($36.4M), DACH Region ($25.8M), India ($24.3M), Japan ($19.5M), Brazil ($17.4M), Australia ($17.2M), South Korea ($10.0M), France ($9.9M).
3. **Top 5 Growth Markets (Spending YOY):** Taiwan (+18.7%), Bulgaria (+17.1%), Singapore (+14.6%), Israel (+13.8%), Spain (+11.7%).
4. **Top 5 Declining Markets (Spending YOY):** Iran (-11.1%), Turkey (-1.3%).
5. UK + Ireland leads by spending ($65.6M). Canada leads by visits (102.7K).
6. **CAGR:** 2023-2027 projected spending CAGR (8.1%) exceeds 2015-2019 (2.5%).
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

Missouri

$439.5M
2026 Projected Spending
+6.2% YOY vs. 2025

343.3K
2026 Projected Visitors
+4.4% YOY vs. 2025

$396.0M
2026 Overseas Spending
+6.2% YOY vs. 2025

216.4K
2026 Overseas Visitors
+4.2% YOY vs. 2025

$413.7M
2025 Projected Spending
-0.7% YOY vs. 2024

328.7K
2025 Projected Visitors
-8.7% YOY vs. 2024

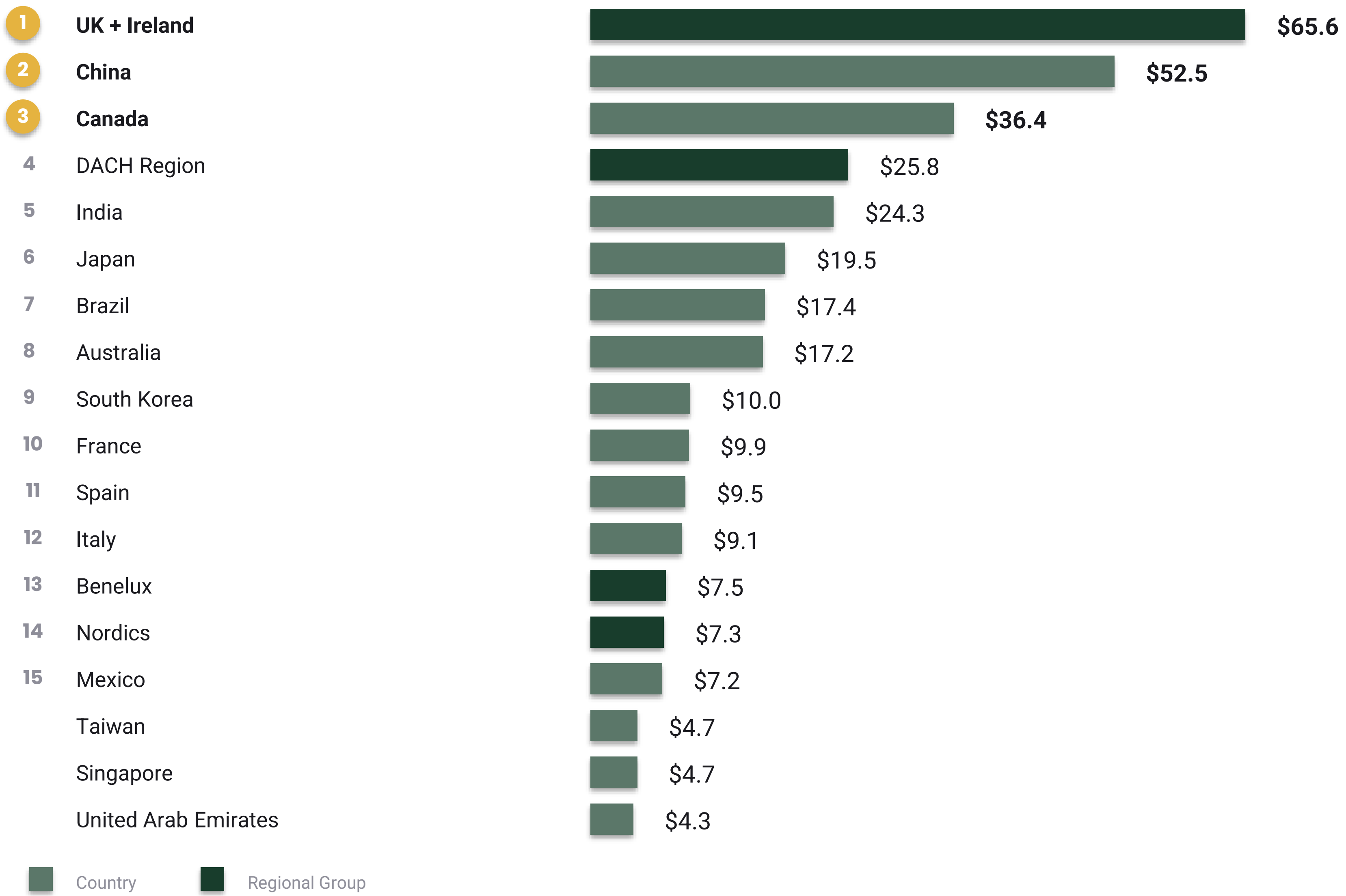
$373.0M
2025 Overseas Spending
+2.5% YOY vs. 2024

207.6K
2025 Overseas Visitors
-2.9% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Top Source Markets | 2026 Projections

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

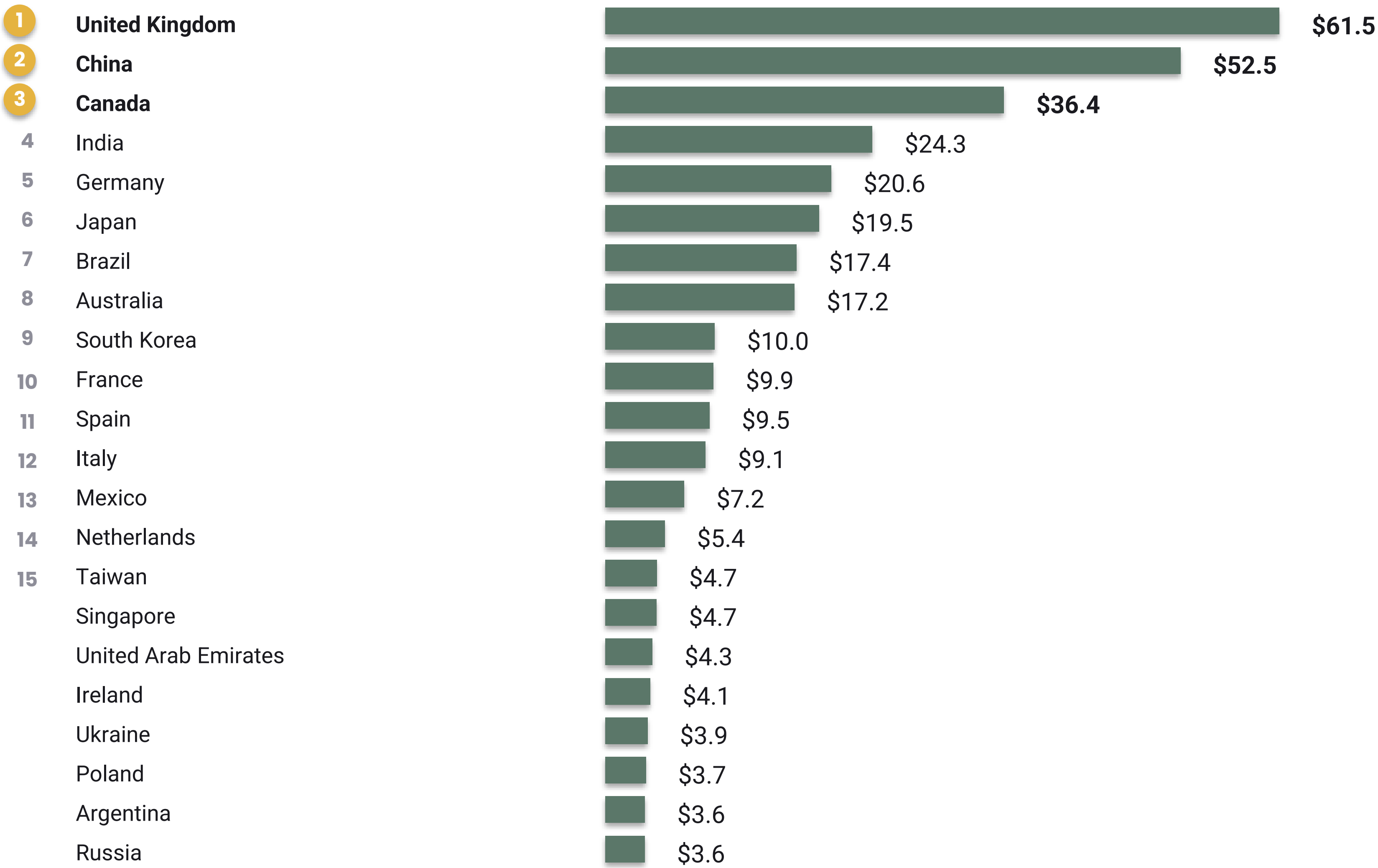


Travel South USA

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	$61.5	31.9	+3.9%	+5.3%
2	China	$52.5	16.4	+5.9%	+5.3%
3	Canada	$36.4	102.7	+6.9%	+5.3%
4	India	$24.3	16.9	+6.7%	+2.0%
5	Germany	$20.6	11.5	+7.4%	+3.2%
6	Japan	$19.5	15.2	+7.1%	+7.8%
7	Brazil	$17.4	6.4	+7.7%	+4.0%
8	Australia	$17.2	7.8	+6.0%	+3.8%
9	South Korea	$10.0	8.8	+4.7%	+5.4%
10	France	$9.9	8.1	+4.5%	+2.4%
11	Spain	$9.5	6.9	+11.7%	+3.9%
12	Italy	$9.1	6.9	+5.7%	+3.3%
13	Mexico	$7.2	24.2	+6.7%	+2.6%
14	Netherlands	$5.4	3.6	+7.8%	+4.8%
15	Taiwan	$4.7	3.0	+18.7%	+9.3%
16	Singapore	$4.7	2.0	+14.6%	+7.6%
17	United Arab Emirates	$4.3	1.0	+4.9%	+10.9%
18	Ireland	$4.1	3.2	+6.3%	+5.0%
19	Ukraine	$3.9	0.5	+6.7%	+1.5%
20	Poland	$3.7	2.2	+2.4%	-2.1%
21	Argentina	$3.6	3.1	+8.5%	+5.9%
22	Russia	$3.6	1.3	+6.1%	+8.4%

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	+13.0%	+0.4%
2	China	+5.2%	-3.9%
3	Canada	-26.5%	-21.6%
4	India	-5.7%	-4.8%
5	Germany	+5.8%	-11.4%
6	Japan	+10.4%	+4.7%
7	Brazil	+14.1%	-0.1%
8	Australia	-15.4%	-6.7%
9	South Korea	-17.2%	-7.0%
10	France	-2.2%	-6.1%
11	Spain	+12.6%	+1.4%
12	Italy	+13.1%	+5.3%
13	Mexico	+4.8%	+8.6%
14	Netherlands	+11.0%	-8.8%
15	Taiwan	+34.1%	+8.5%
16	Singapore	-3.4%	-8.1%
17	United Arab Emirates	+3.5%	-4.1%
18	Ireland	-3.2%	+0.6%
19	Ukraine	+35.4%	+7.7%
20	Poland	-1.5%	+4.3%
21	Argentina	+12.7%	+14.5%
22	Russia	+8.7%	+7.3%

Decline Growth

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015-2019 CAGR

2.5% Spending

1.6% Visits

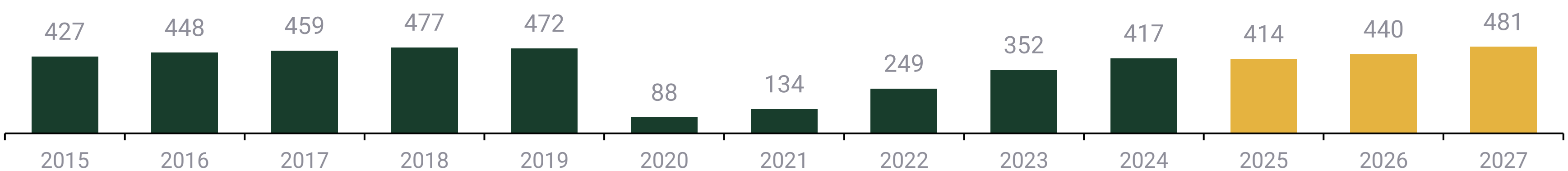
2023-2027 PROJECTED CAGR

8.1% Spending

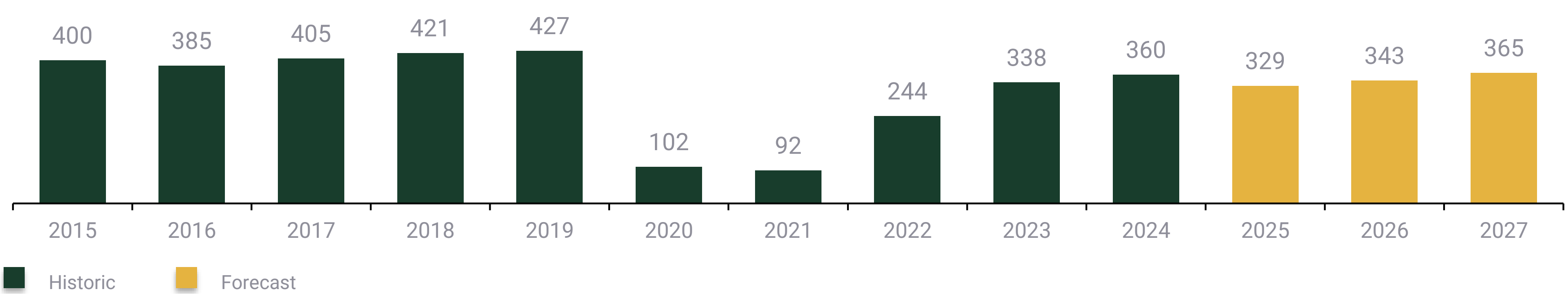
1.9% Visits

CAGR is Compound Annual Growth Rate.

Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Macro Context

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

Market	GDP % Change	Exchange rate	Currency pair
United Kingdom	1.3%	1.35	GBP/USD
China	4.2%	6.84	CNY/USD
Canada	1.5%	1.37	CAD/USD
India	6.2%	90.92	INR/USD
Germany	0.9%	1.18	EUR/USD
Japan	0.6%	156.13	JPY/USD
Brazil	1.9%	5.15	BRL/USD
Australia	2.1%	0.71	AUD/USD
South Korea	1.8%	1,433.32	KRW/USD
France	0.9%	1.18	EUR/USD

Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

International Markets

67%
Familiarity

75%
Appeal

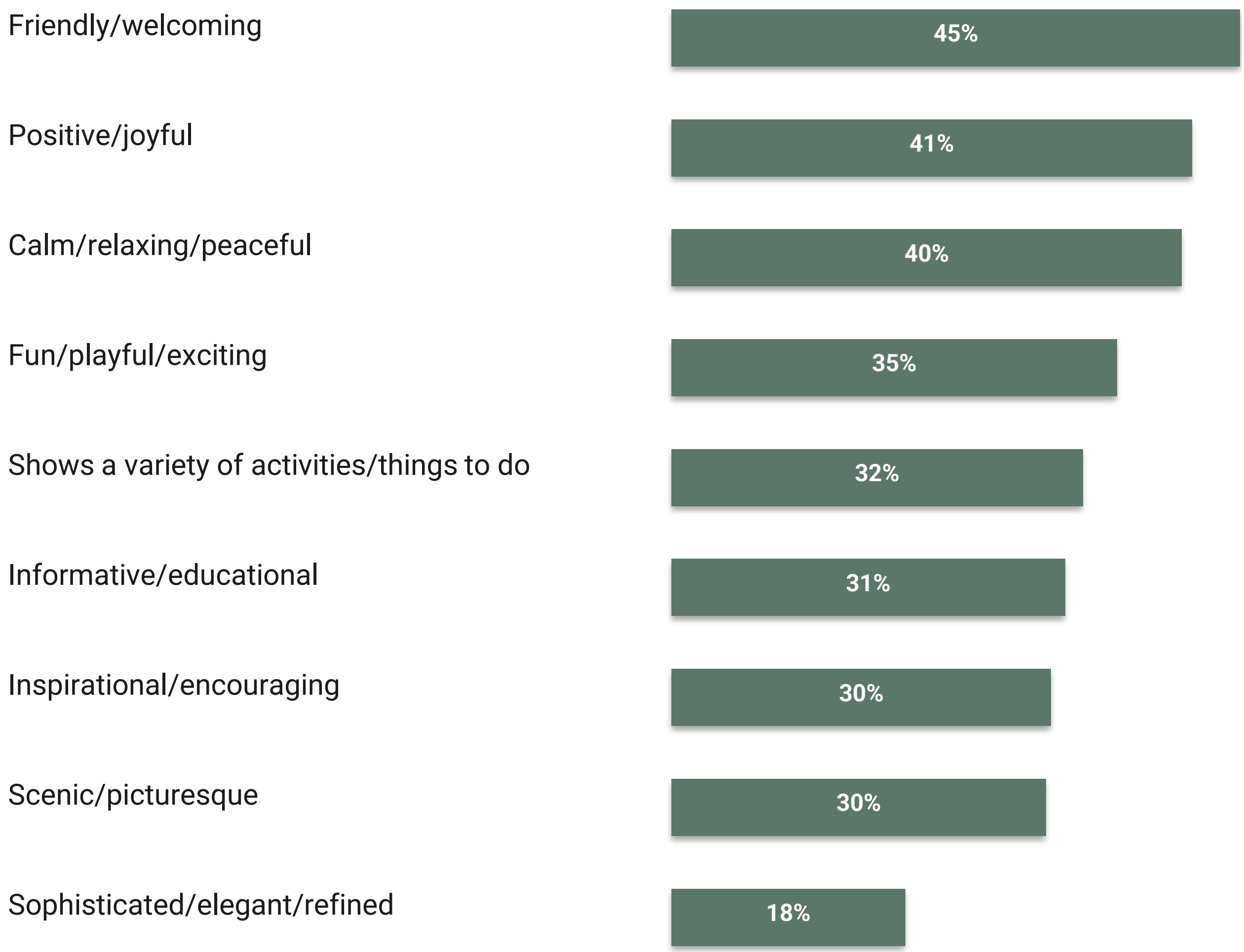
29%
Promotional Buzz

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%
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

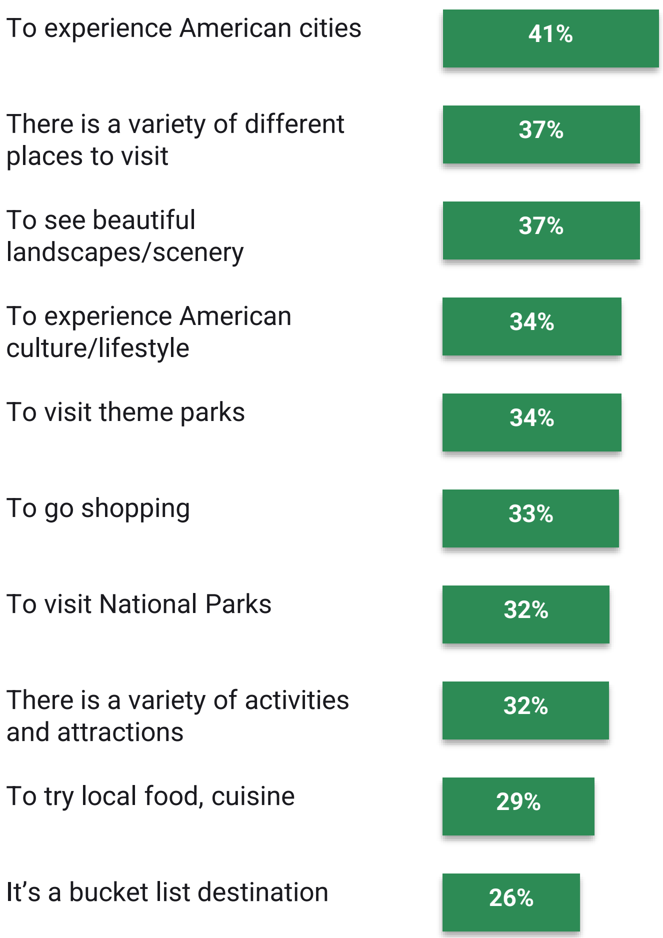
$772
Transport
Intl: $772

$5,049
Total
Intl: $5,049

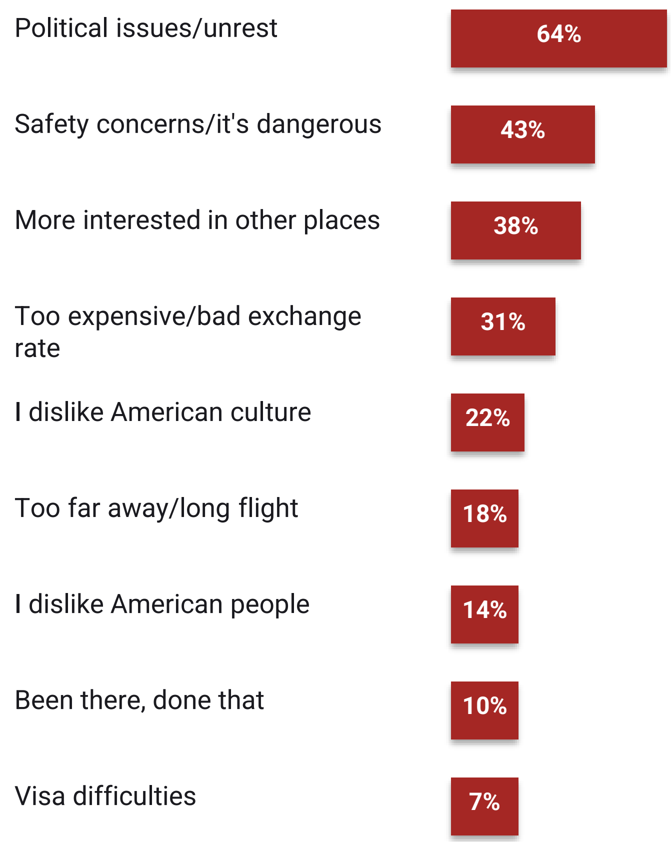
Enablers & Barriers to Visiting

International Markets

Enablers



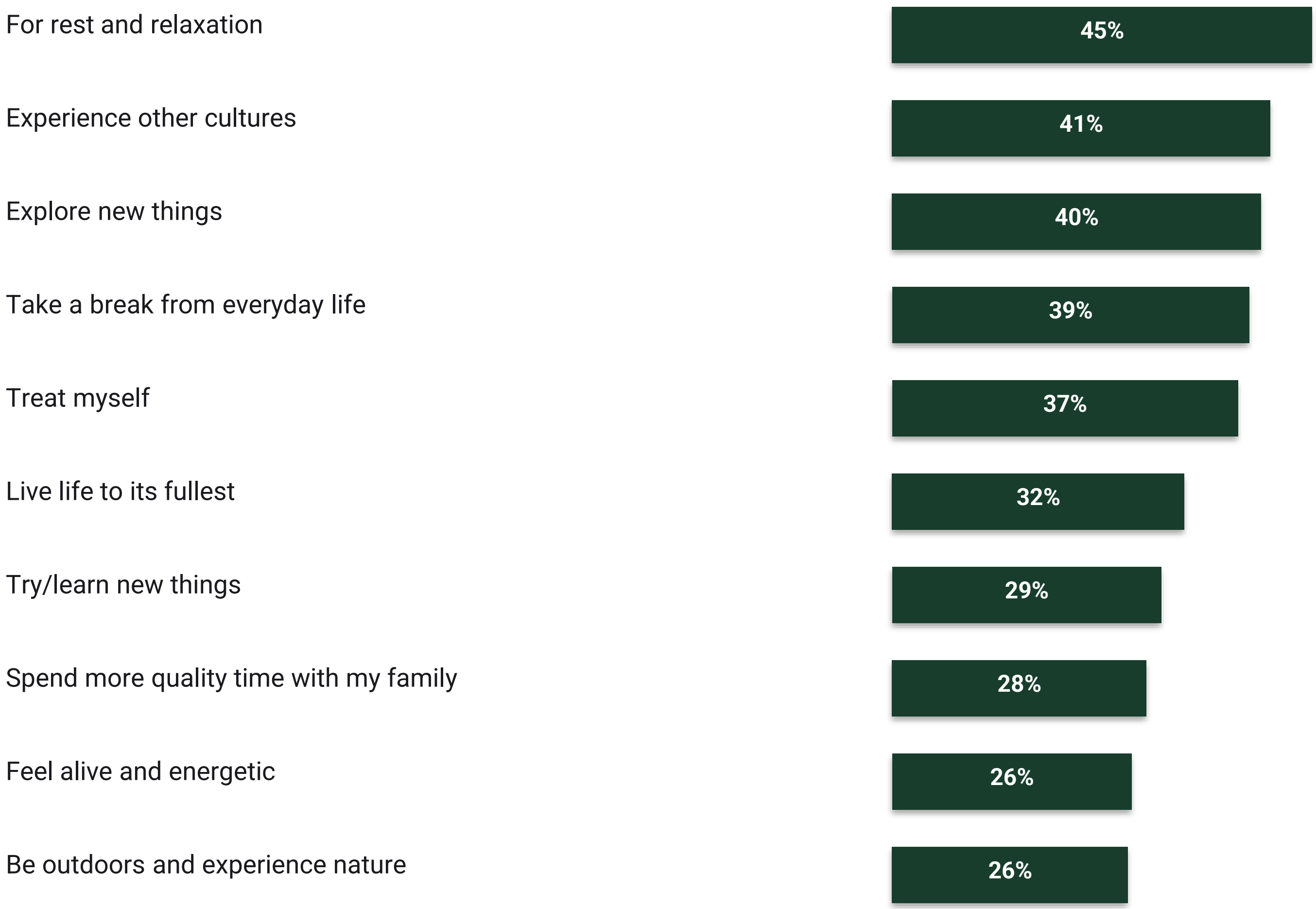
Barriers



Source: Future Partners, Mar 2026

Travel Motivations

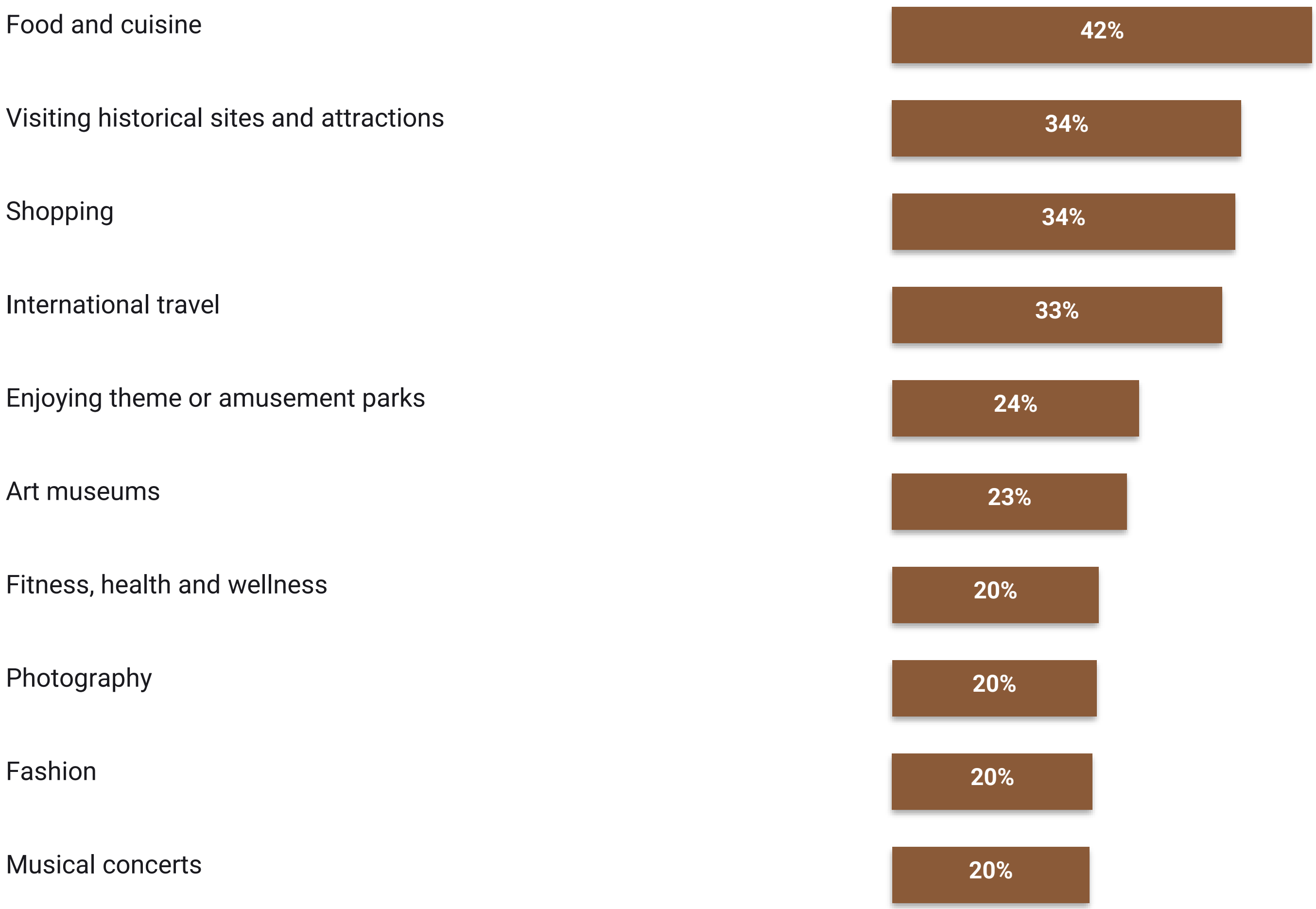
International Markets



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 | Missouri

#1 by Spending | #2 by Visits

United Kingdom | Key Findings

1. **2026 Missouri projected spending:** $61.5M (+4.1% YOY). Projected visitors: 31.9K (+5.3% YOY). Ranks #1 by spending and #2 by visits among Missouri 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 (4.1%).
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

$61.5M
2026 Missouri Spending
+4.1% YOY vs. 2025

31.9K
2026 Missouri 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

$59.1M
2025 Missouri Spending
+12.8% YOY vs. 2024

30.3K
2025 Missouri 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

4.1% Spending

2.4% Visits

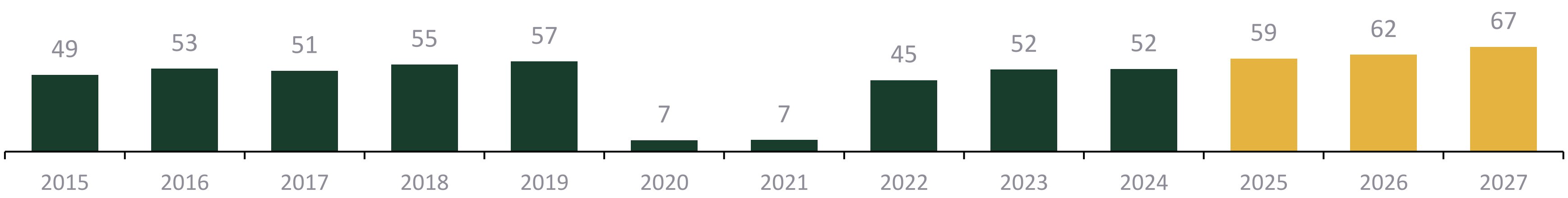
2023–2027 PROJECTED CAGR

6.3% Spending

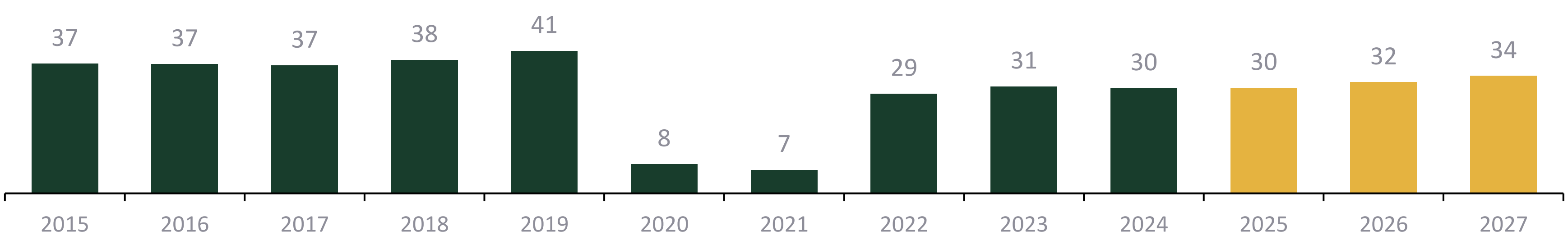
2.4% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Historic Forecast

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%

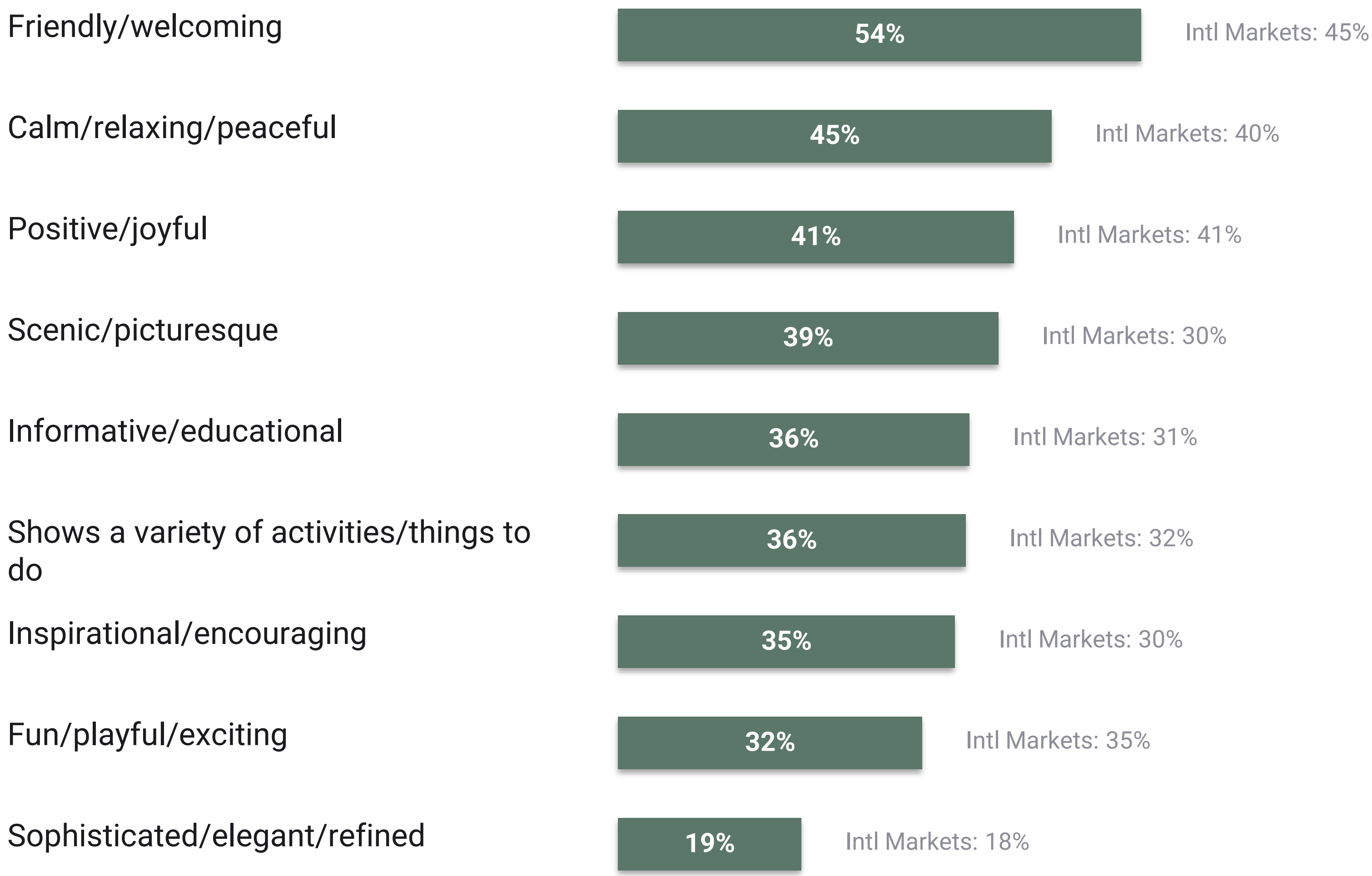
Likely to Visit (5yr)

Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

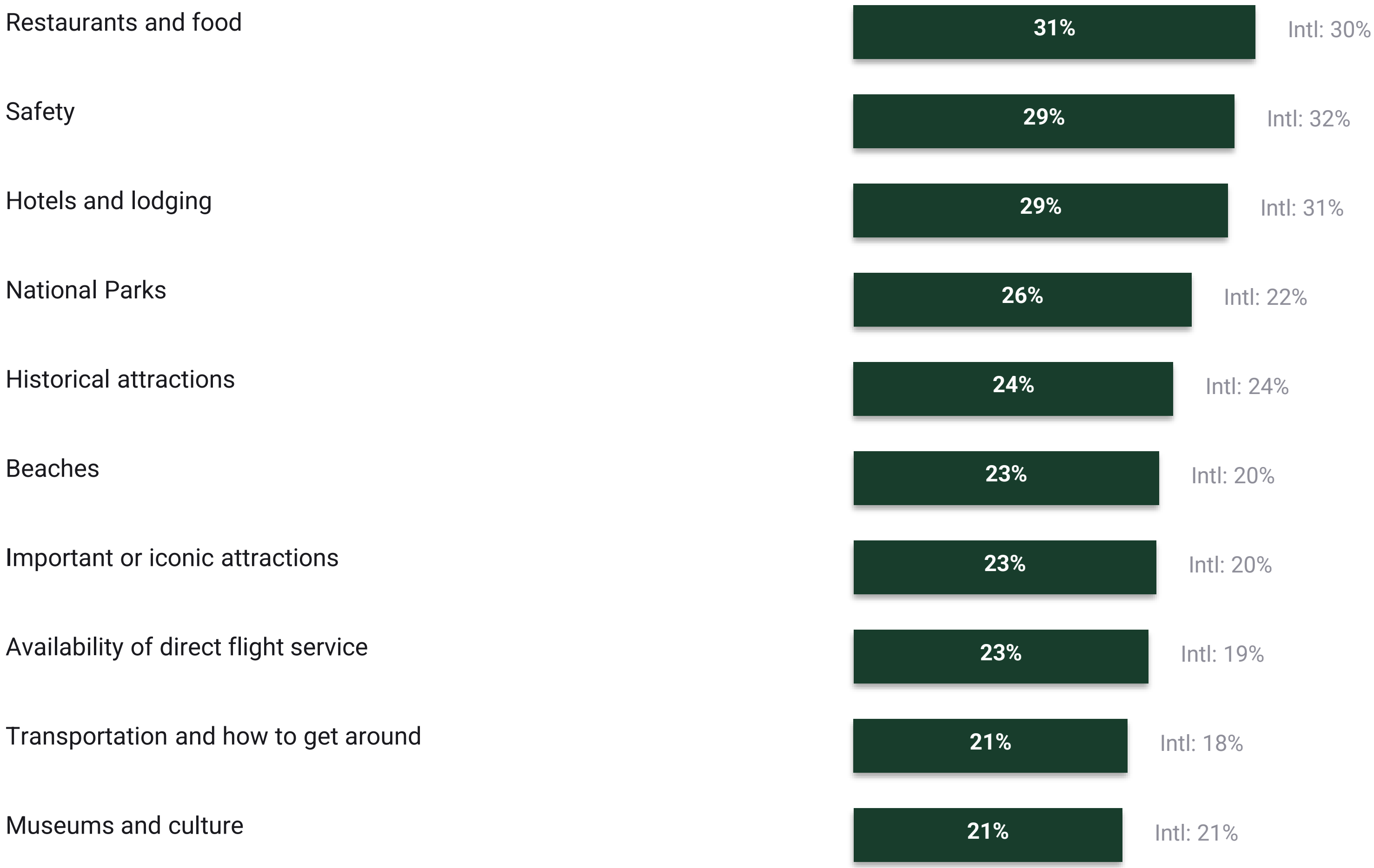
United Kingdom



Source: Future Partners, Mar 2026

Top Information Sources

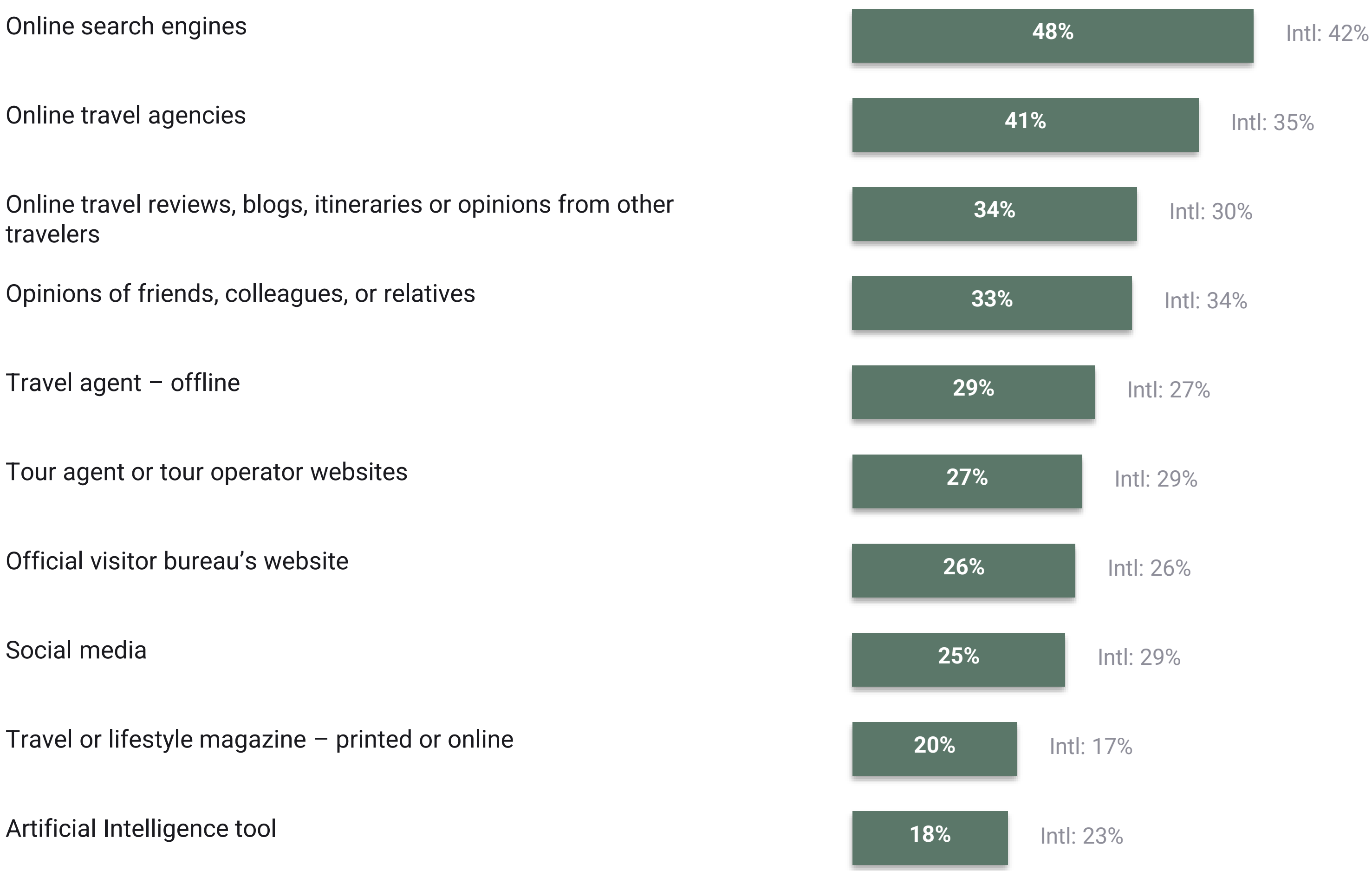
United Kingdom



Source: Future Partners, Mar 2026

Planning Resources

United Kingdom



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

To experience American cities	45%	Intl: 41%
There is a variety of different places to visit	44%	Intl: 37%
To experience American culture/lifestyle	36%	Intl: 34%
To visit National Parks	35%	Intl: 32%
To see beautiful landscapes/scenery	34%	Intl: 37%
There is a variety of activities and attractions	33%	Intl: 32%
To try local food, cuisine	31%	Intl: 29%
To go shopping	31%	Intl: 33%
To visit theme parks	30%	Intl: 34%
It’s a bucket list destination	25%	Intl: 26%

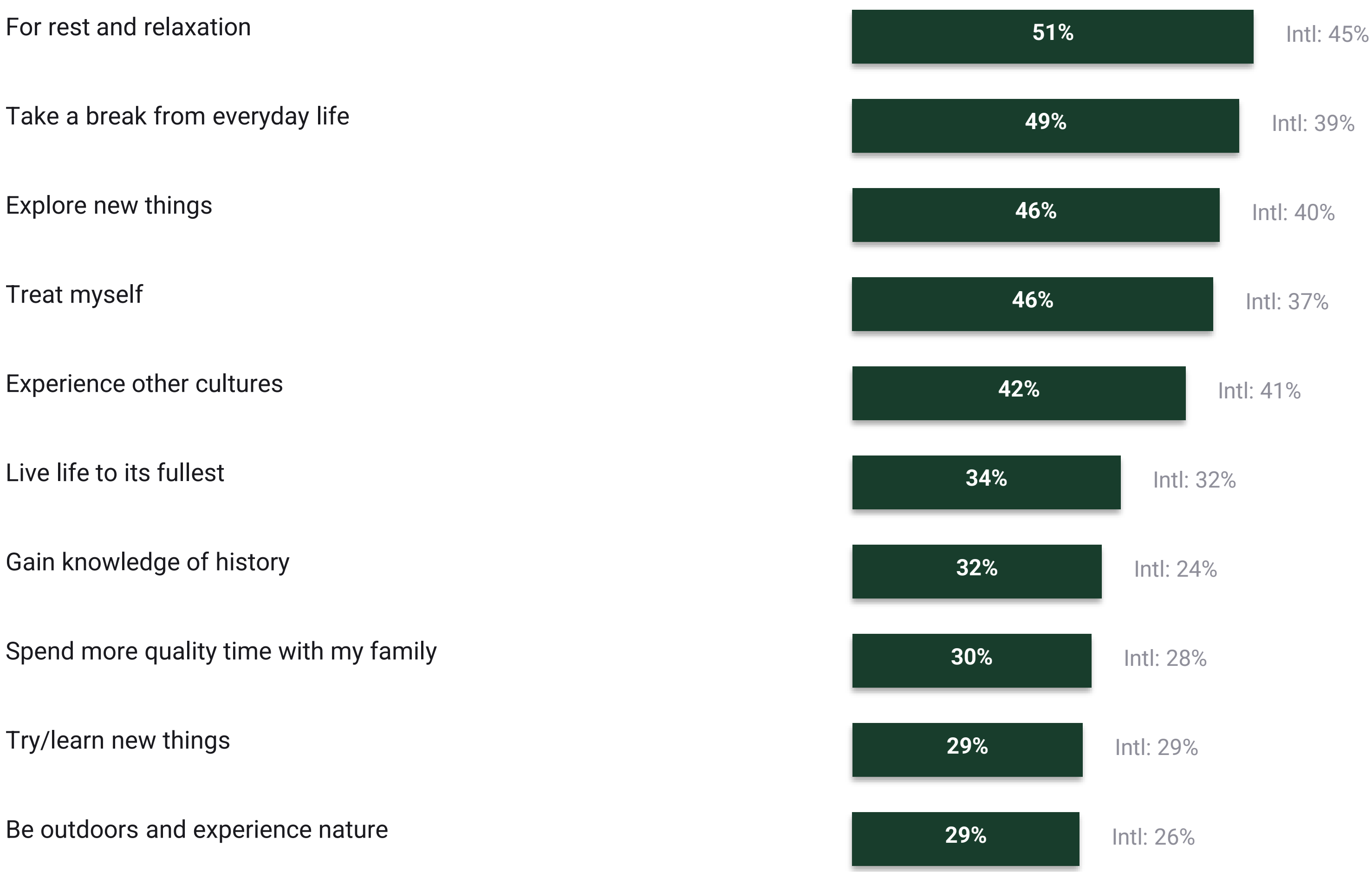
Barriers

Political issues/unrest	72%	Intl: 64%
More interested in other places	43%	Intl: 38%
Safety concerns/it's dangerous	39%	Intl: 43%
I dislike American culture	26%	Intl: 22%
Too expensive/bad exchange rate	25%	Intl: 31%
Too far away/long flight	21%	Intl: 18%
Been there, done that	16%	Intl: 10%
I dislike American people	14%	Intl: 14%
Visa difficulties	0%	Intl: 7%

Source: Future Partners, Mar 2026

Travel Motivations

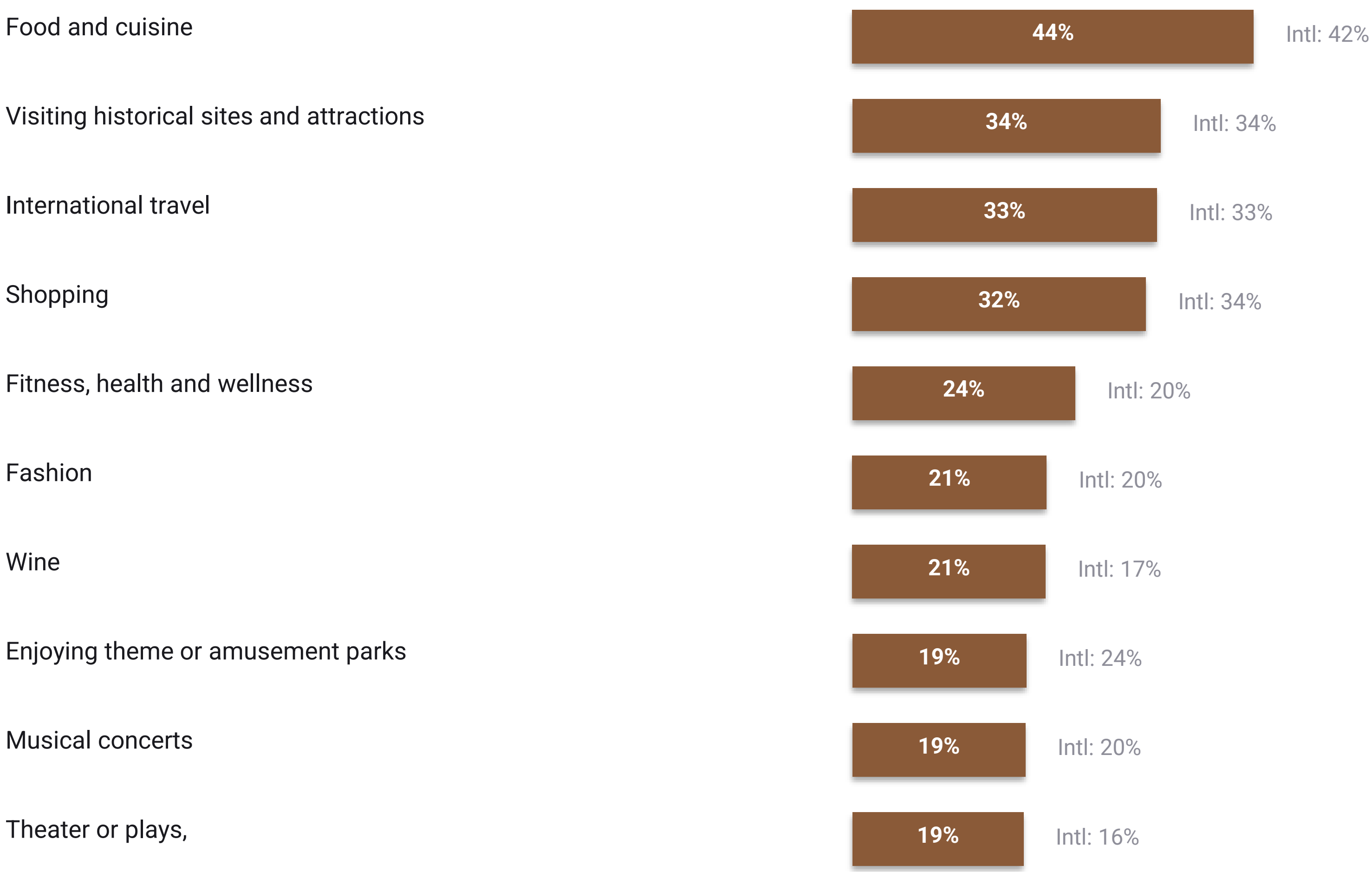
United Kingdom



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 | Missouri

#2 by Spending | #5 by Visits

China | Key Findings

1. **2026 Missouri projected spending:** $52.5M (+6.1% YOY). Projected visitors: 16.4K (+5.1% YOY). Ranks #2 by spending and #5 by visits among Missouri 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 (27.3%) exceeds 2015-2019 (2%).
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

$52.5M
2026 Missouri Spending
+6.1% YOY vs. 2025

16.4K
2026 Missouri Visitors
+5.1% YOY vs. 2025

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

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

$49.5M
2025 Missouri Spending
+5.1% YOY vs. 2024

15.6K
2025 Missouri Visitors
-3.7% 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

2% Spending

3.6% Visits

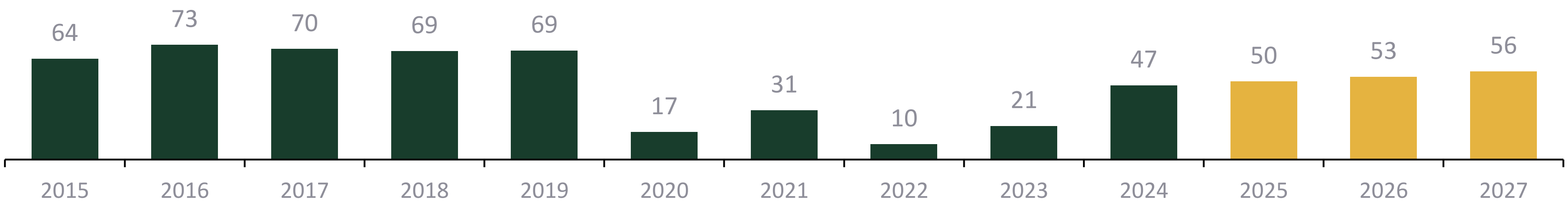
2023-2027 PROJECTED CAGR

27.3% Spending

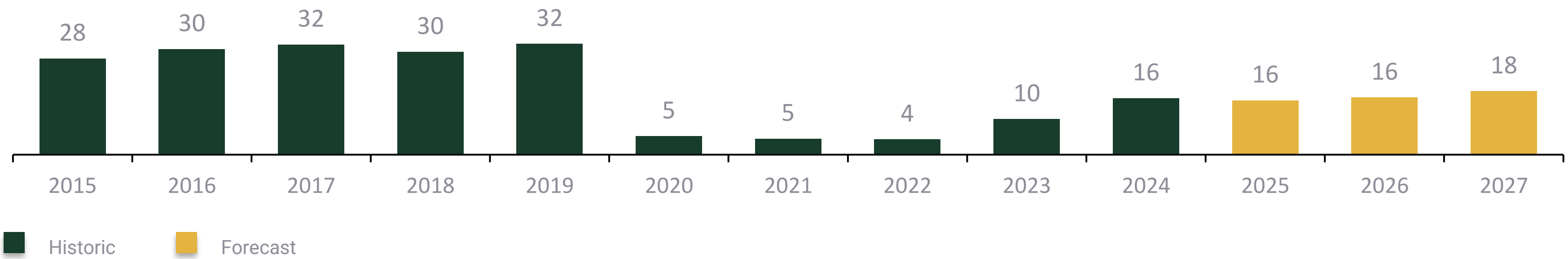
15.6% Visits

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%

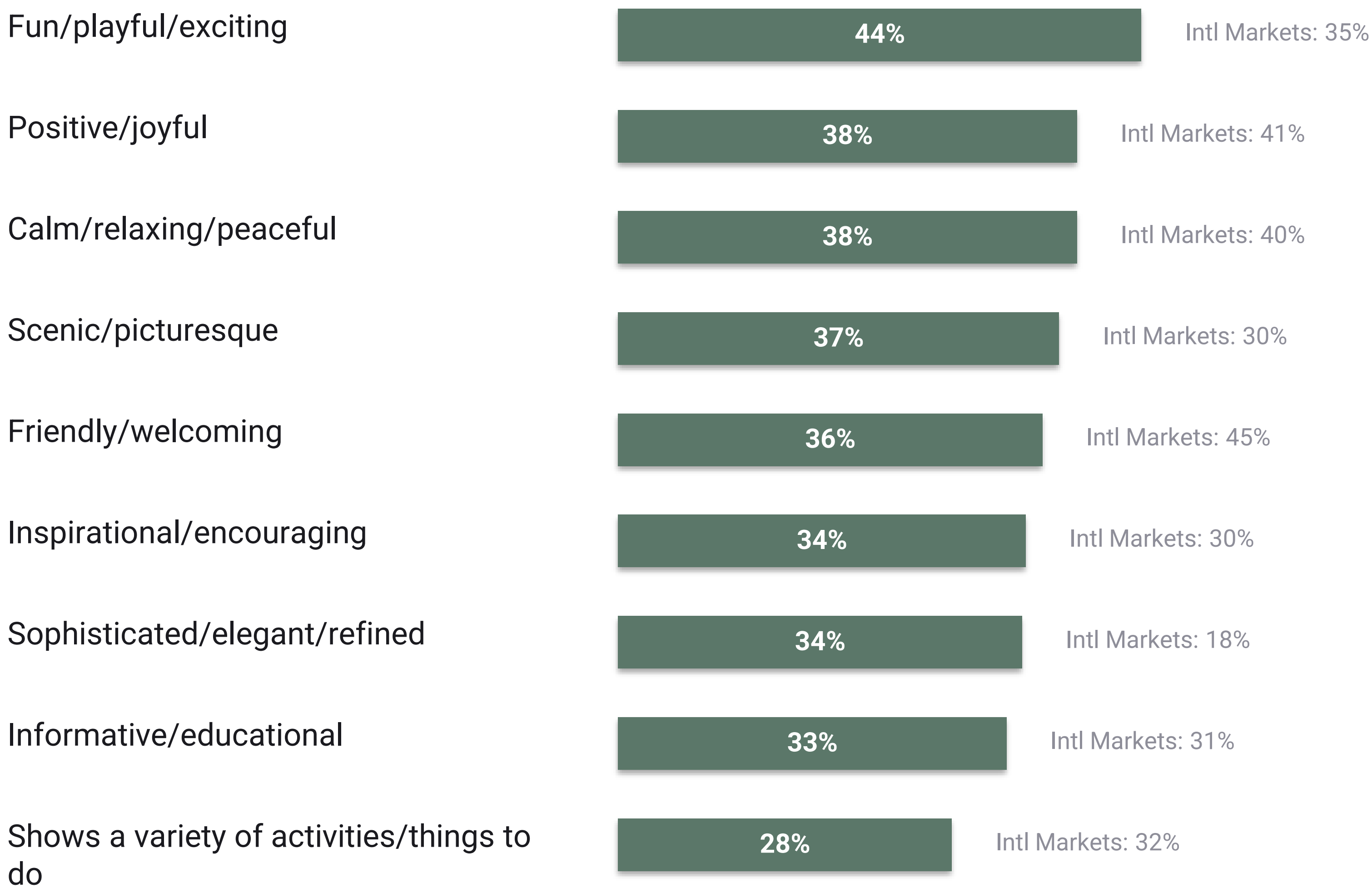
47%
Promotional Buzz
Intl Markets: 29%

54%
Likely to Visit (5yr)
Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

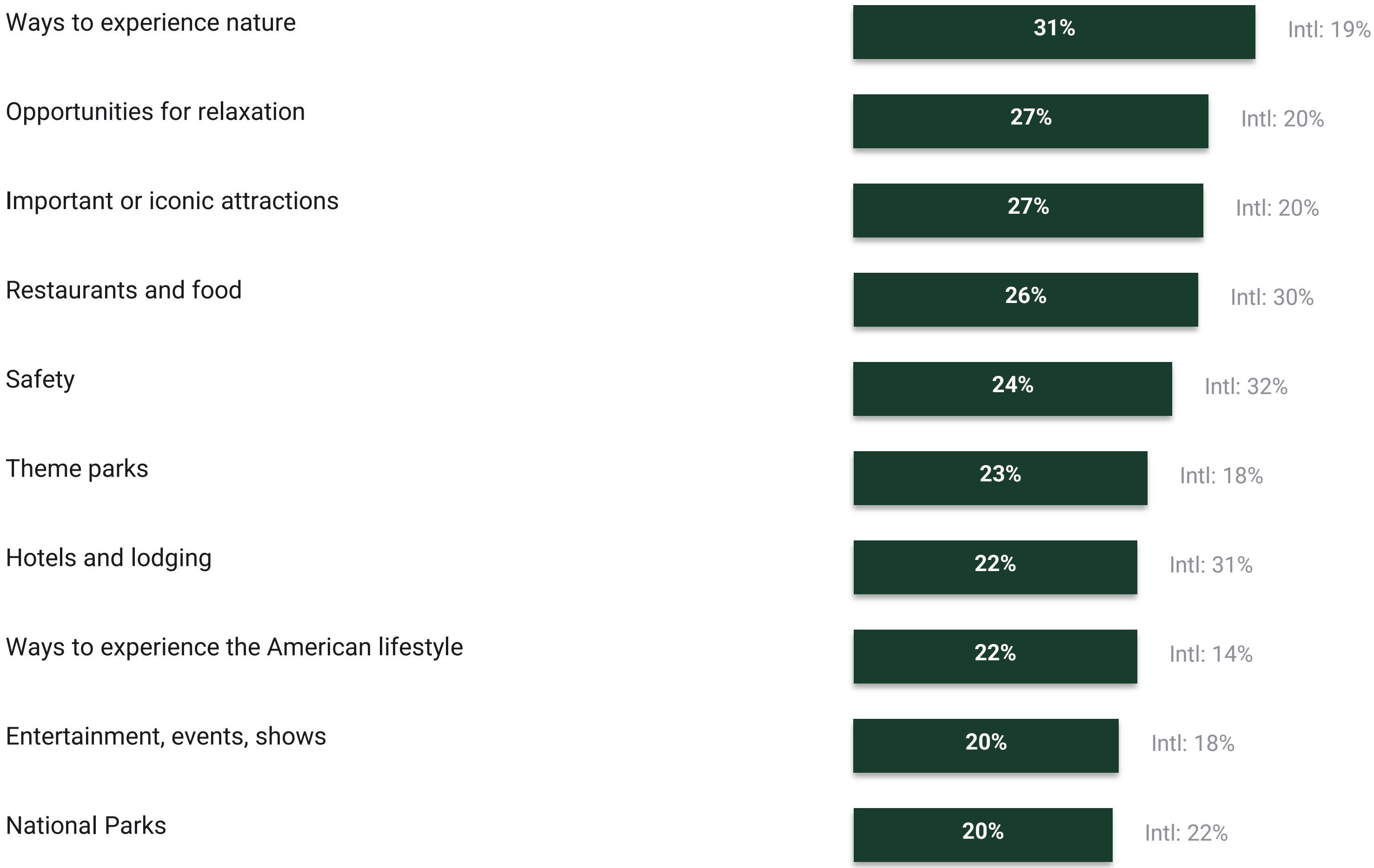
China



Source: Future Partners, Mar 2026

Top Information Sources

China



Source: Future Partners, Mar 2026

Planning Resources

China

Resource	China	Intl
Social media	38%	Intl: 29%
Online search engines	34%	Intl: 42%
Artificial Intelligence tool	30%	Intl: 23%
Online travel agencies	29%	Intl: 35%
Official visitor bureau’s website	29%	Intl: 26%
Opinions of friends, colleagues, or relatives	29%	Intl: 34%
Official visitor bureau’s social media content	25%	Intl: 16%
Official visitor’s bureau visitor information center	24%	Intl: 22%
Tour agent or tour operator websites	24%	Intl: 29%
Travel agent – offline	23%	Intl: 27%

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

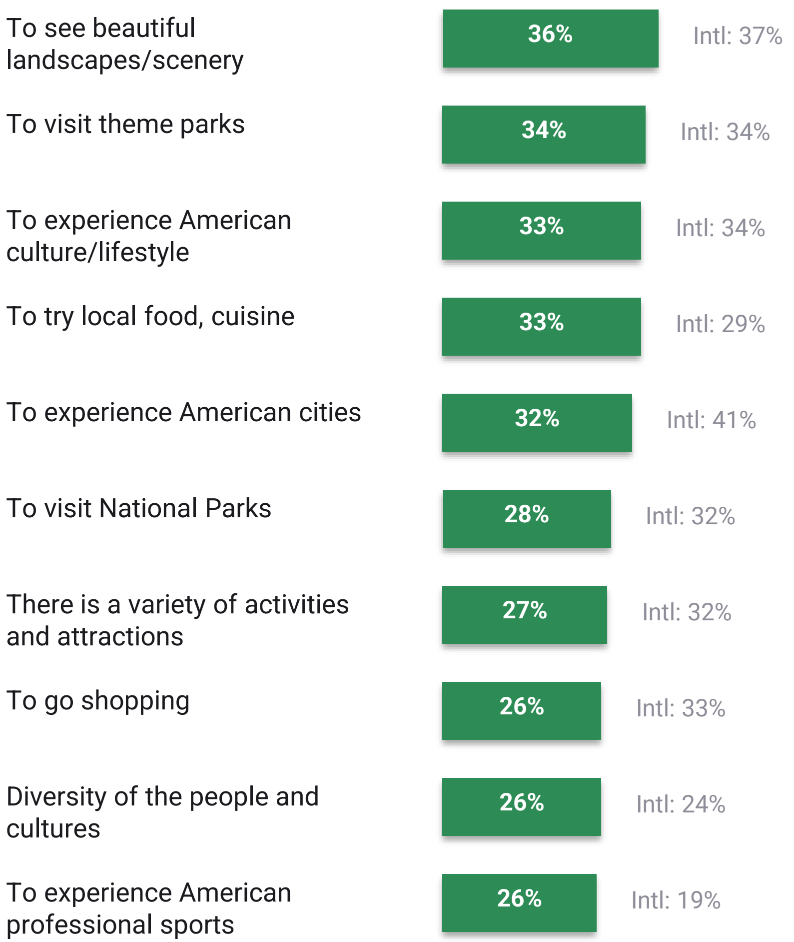
$1,714	$2,743	$1,382	$1,734	$1,098	$8,672
Hotels	**Shopping**	**Dining**	**Sightseeing**	**Transport**	**Total**
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

Source: Future Partners, Mar 2026

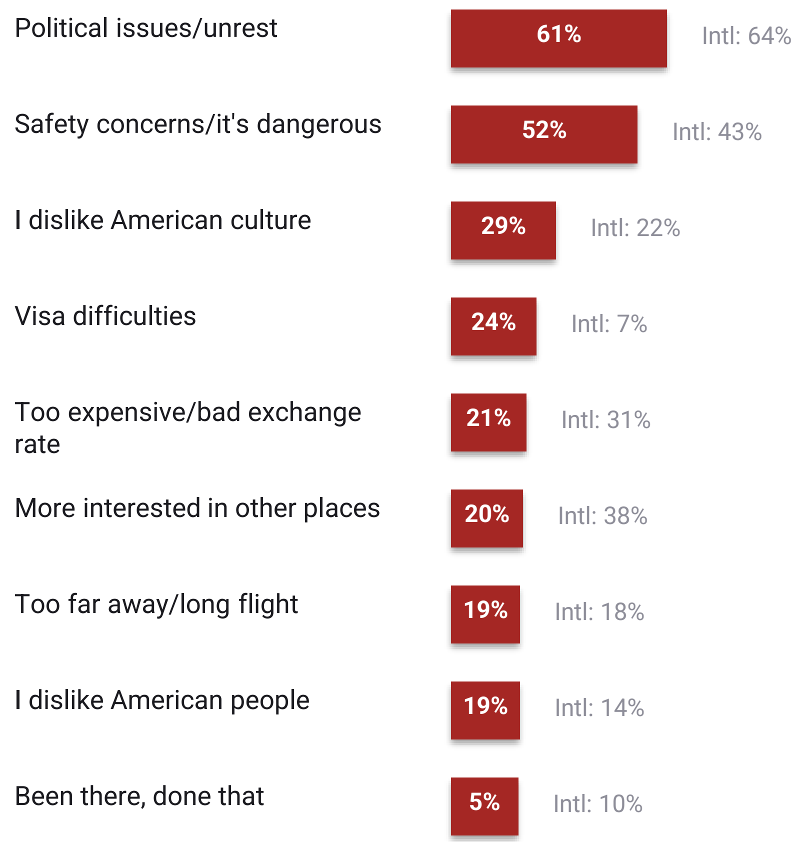
Enablers & Barriers to Visiting

China

Enablers

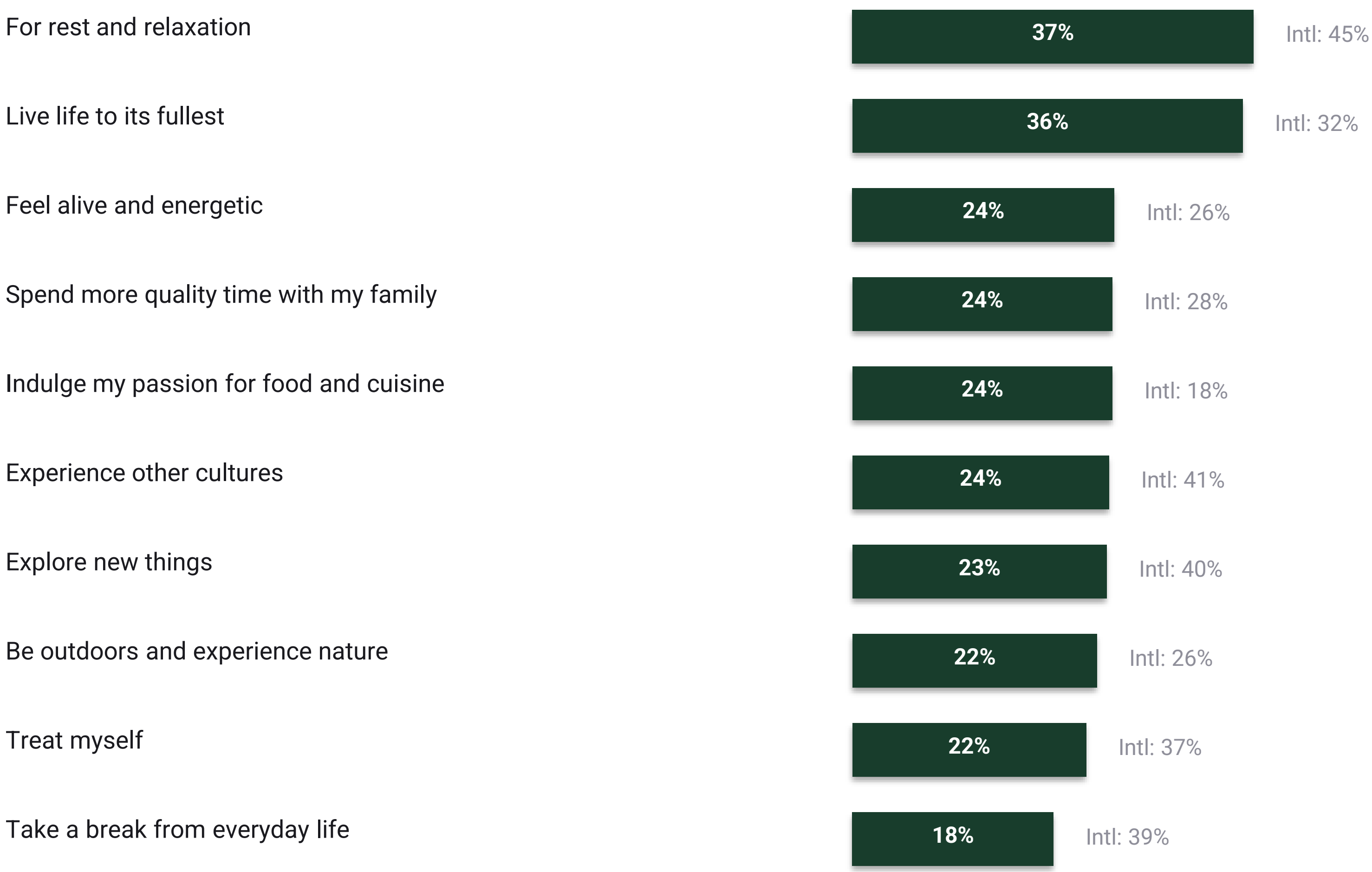


Barriers



Travel Motivations

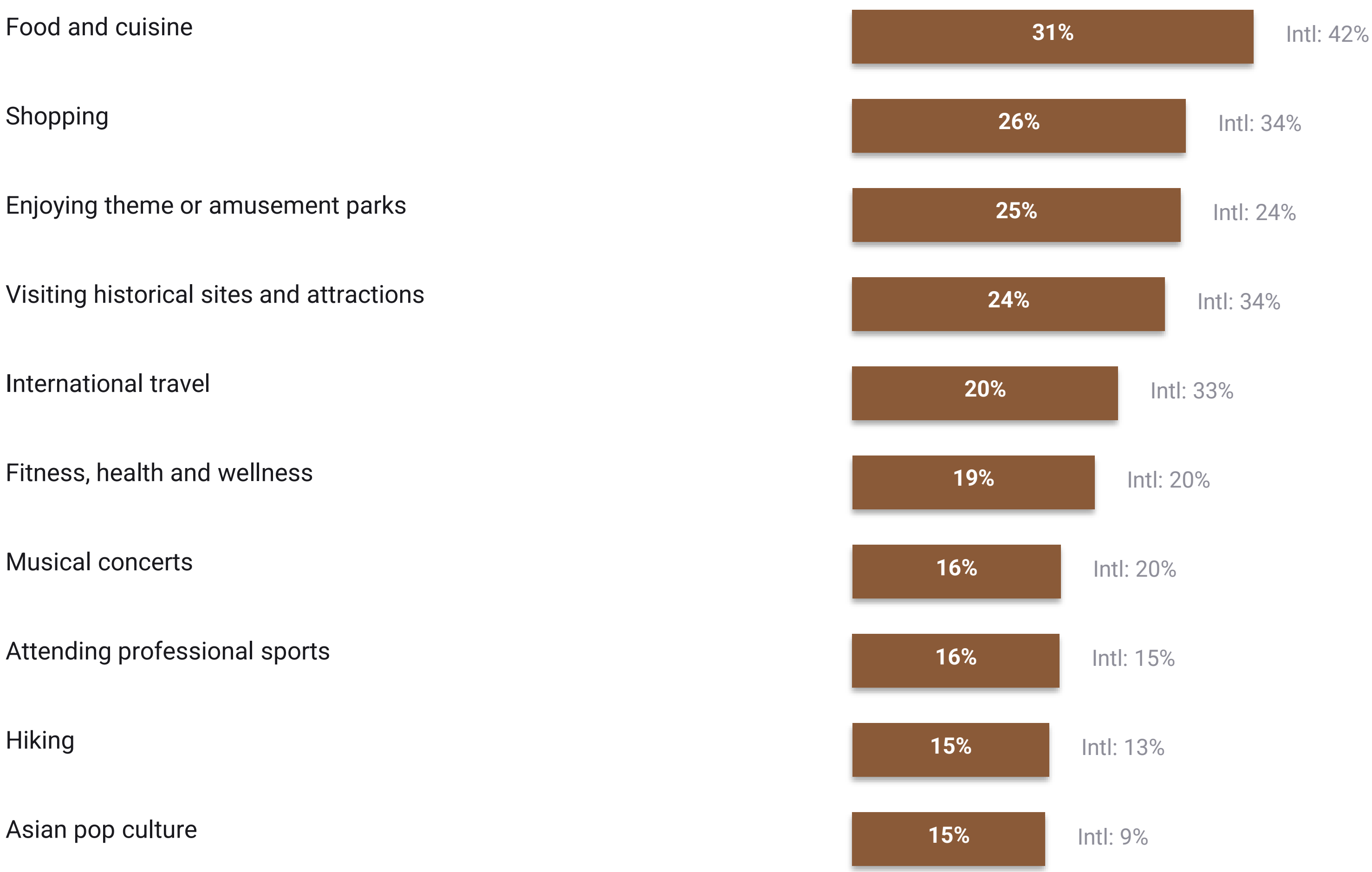
China



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

Source: Future Partners, Mar 2026

CANADA

Source Market Analysis | Missouri

#3 by Spending | #1 by Visits

Canada | Key Findings

1. **2026 Missouri projected spending:** $36.4M (+7.1% YOY). Projected visitors: 102.7K (+5.3% YOY). Ranks #3 by spending and #1 by visits among Missouri 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%) exceeds 2015-2019 (-4.3%).
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

$36.4M
2026 Missouri Spending
+7.1% YOY vs. 2025

102.7K
2026 Missouri Visitors
+5.3% YOY vs. 2025

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

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

$34M
2025 Missouri Spending
-26.6% YOY vs. 2024

97.5K
2025 Missouri Visitors
-21.6% 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

-4.3% Spending

0% Visits

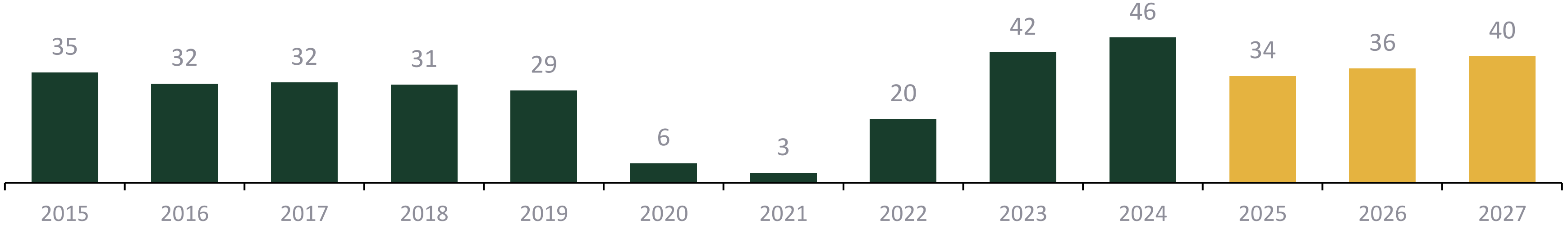
2023-2027 PROJECTED CAGR

-0.7% Spending

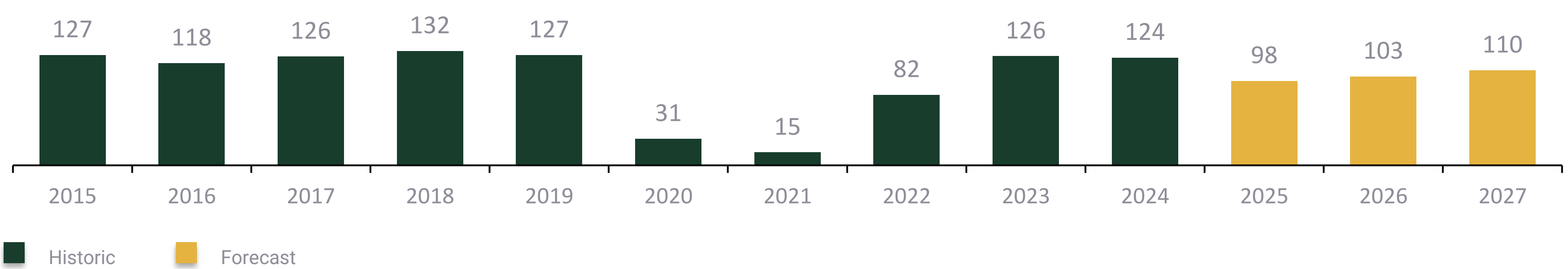
-3.4% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

Canada

66%

Familiarity

Intl Markets: 67%

70%

Appeal

Intl Markets: 75%

24%

Promotional Buzz

Intl Markets: 29%

38%

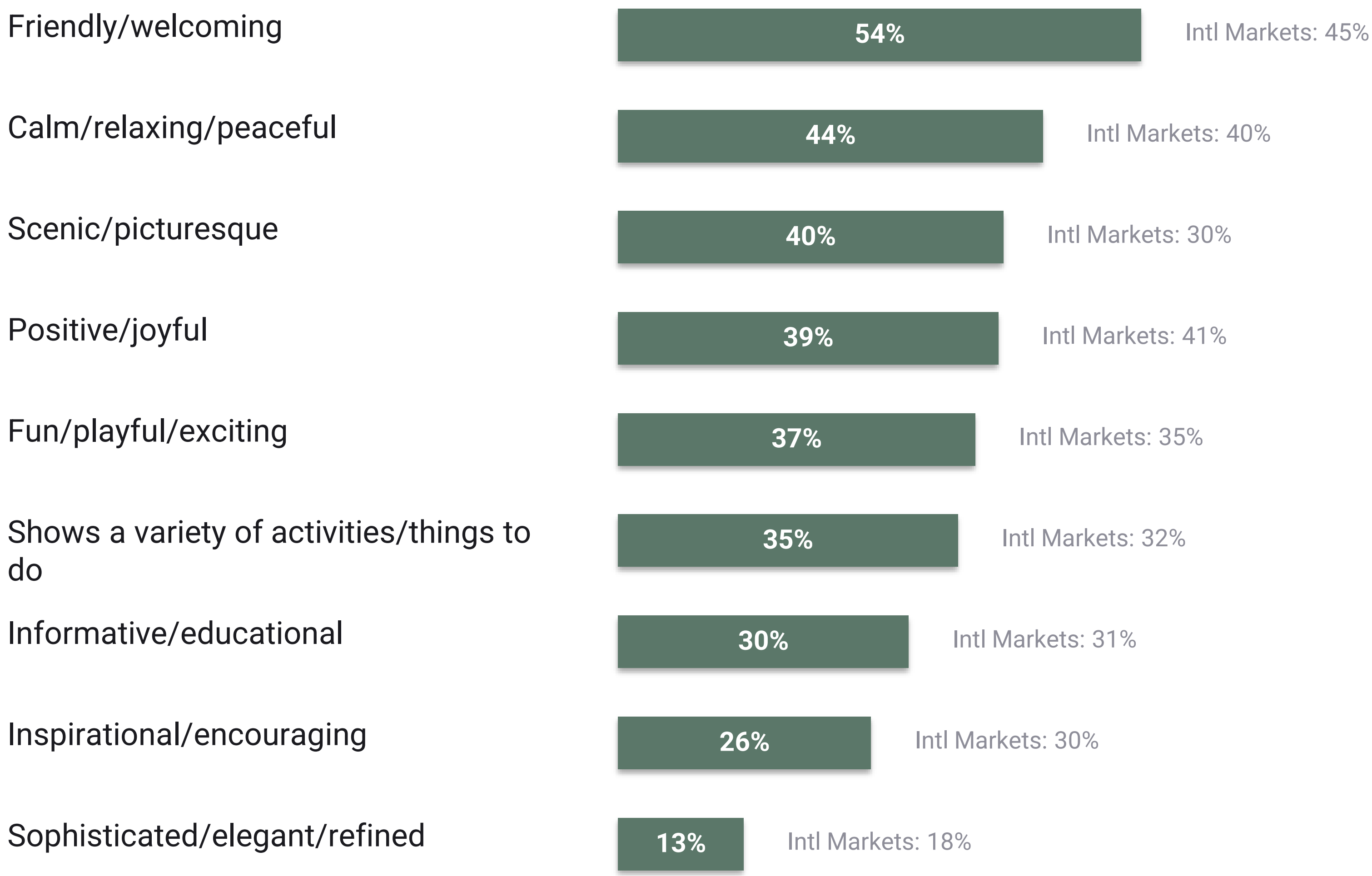
Likely to Visit (5yr)

Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

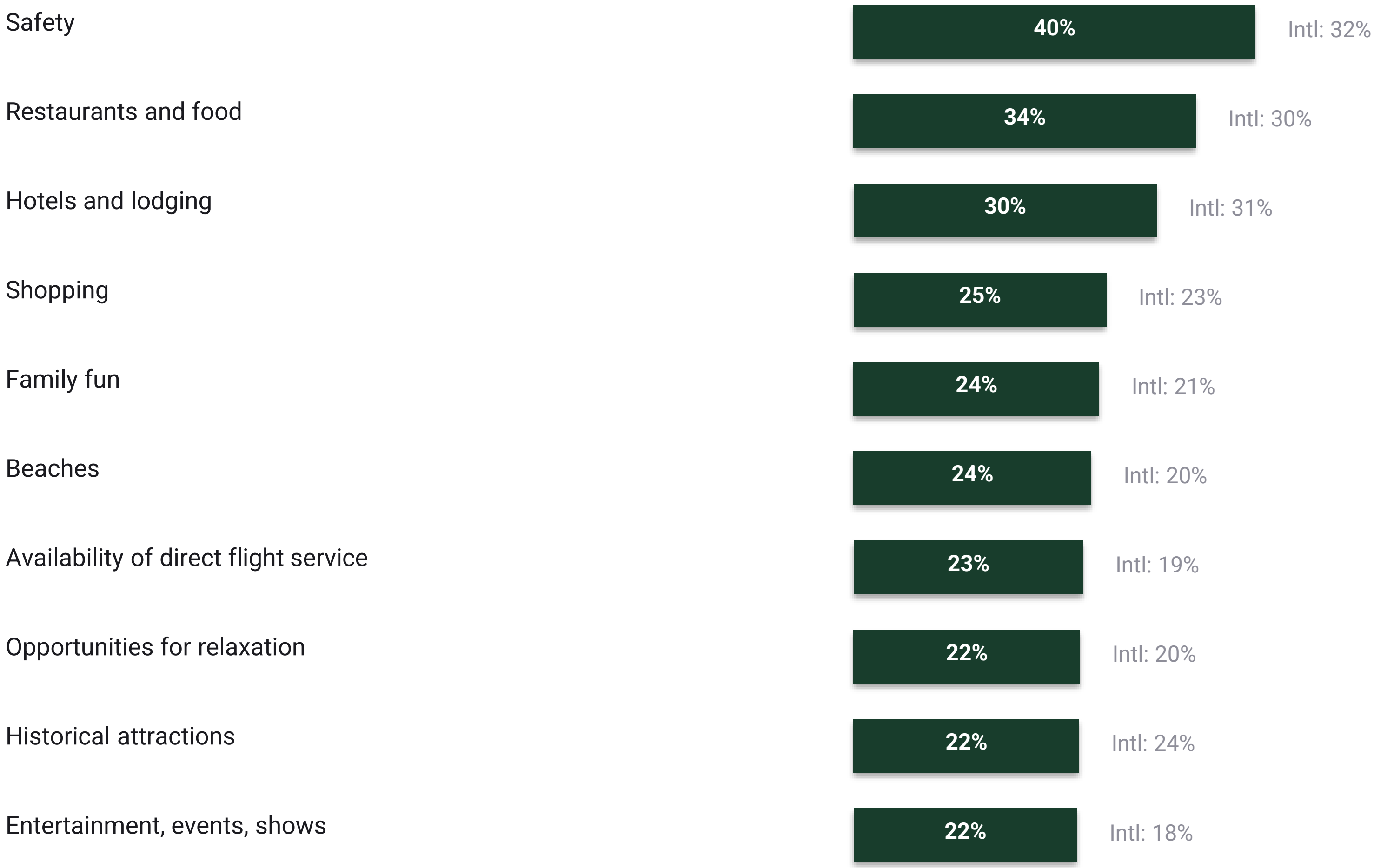
Canada



Source: Future Partners, Mar 2026

Top Information Sources

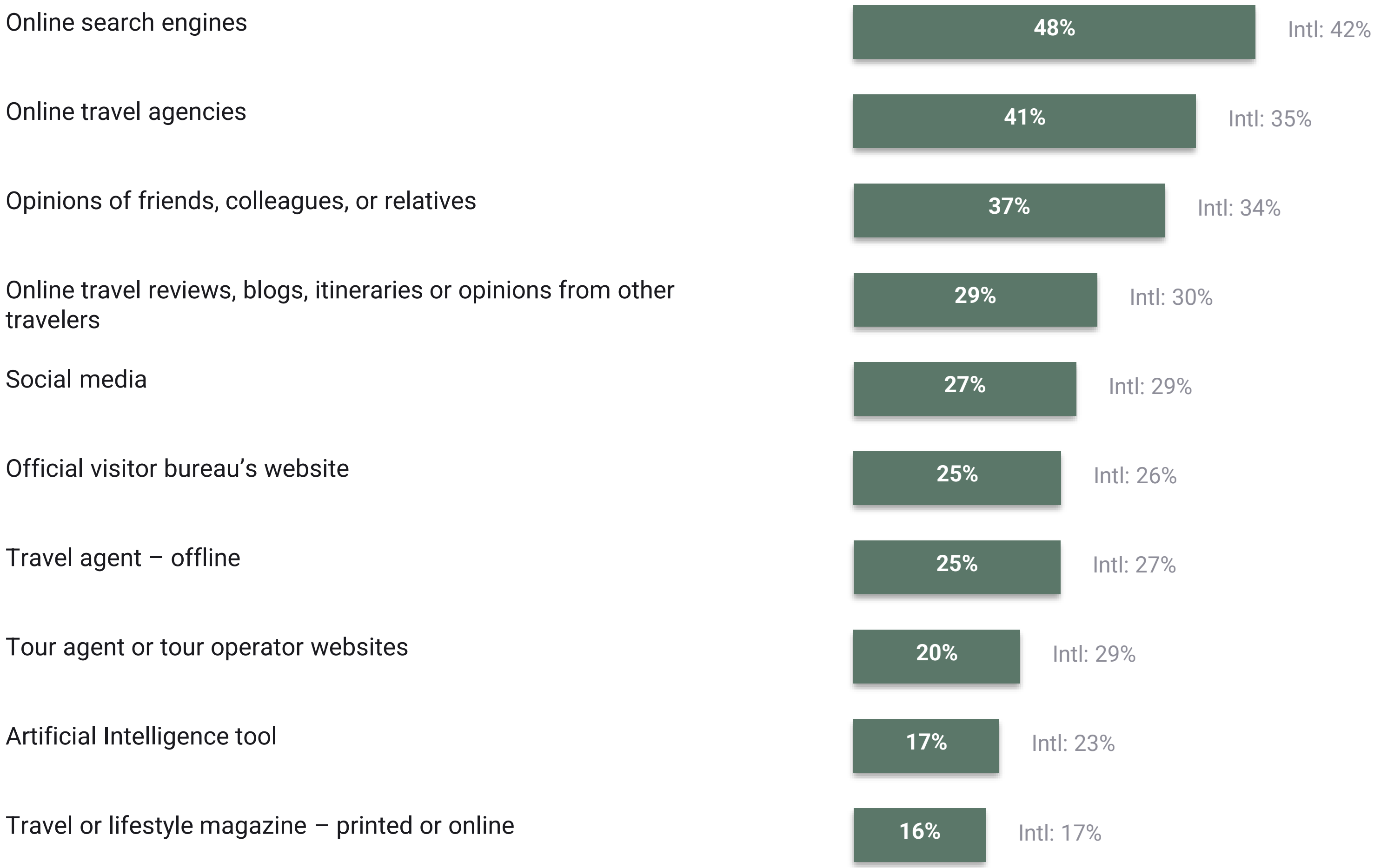
Canada



Source: Future Partners, Mar 2026

Planning Resources

Canada



Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

Canada

U.S. Trip Planning

36%
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

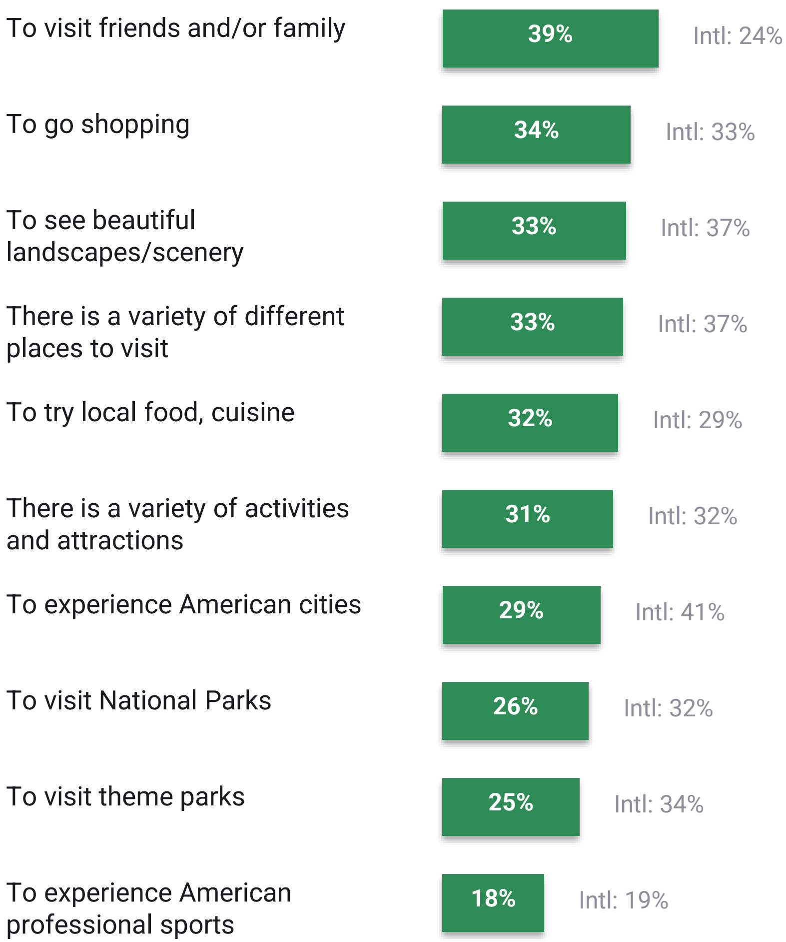
$1,095	$481	$510	$383	$480	$2,949
Hotels	Shopping	Dining	Sightseeing	Transport	Total
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

Source: Future Partners, Mar 2026

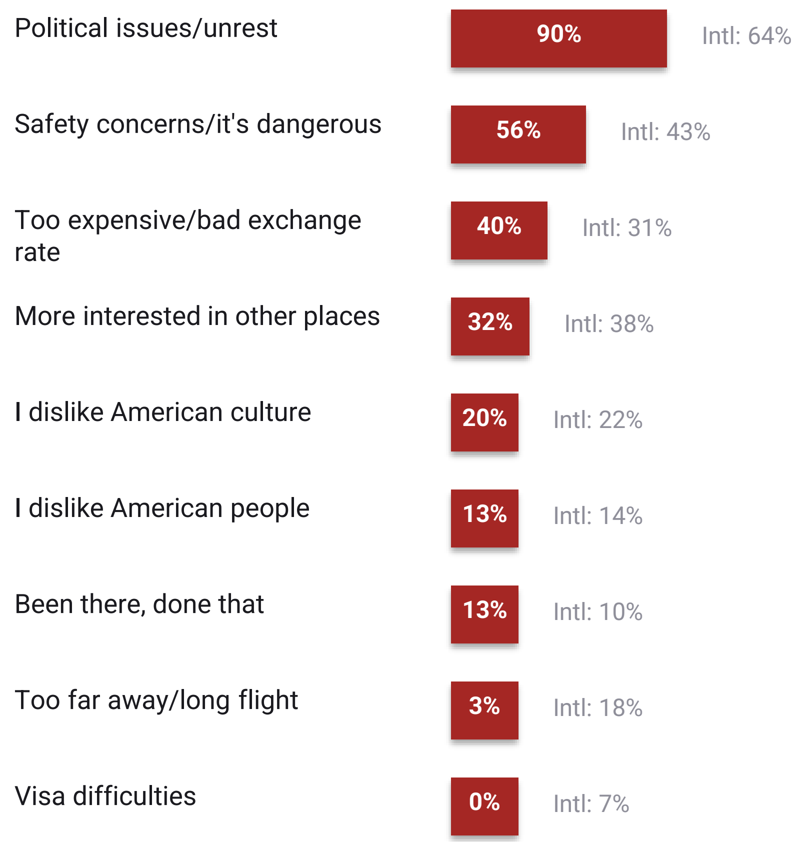
Enablers & Barriers to Visiting

Canada

Enablers



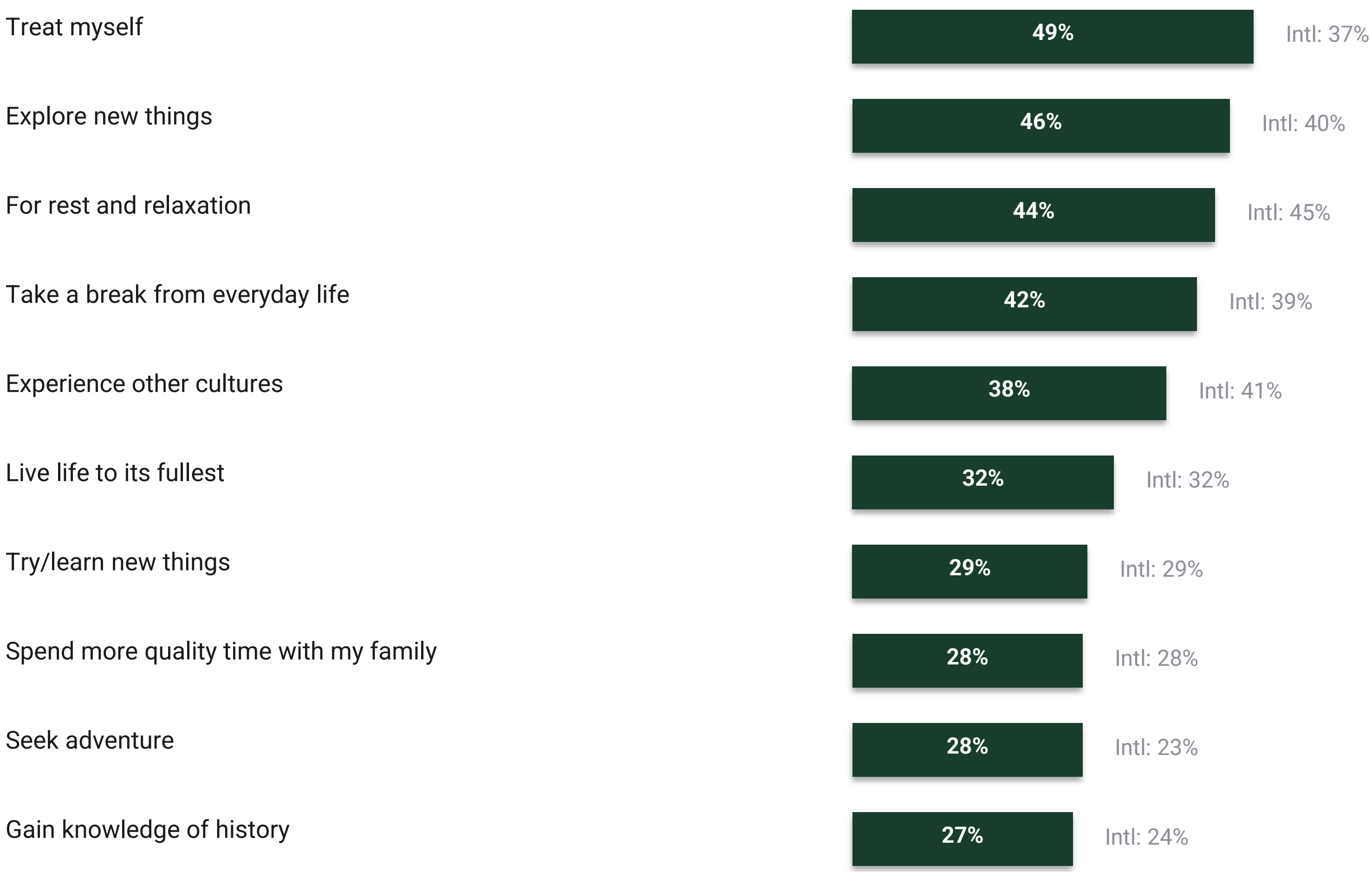
Barriers



Source: Future Partners, Mar 2026

Travel Motivations

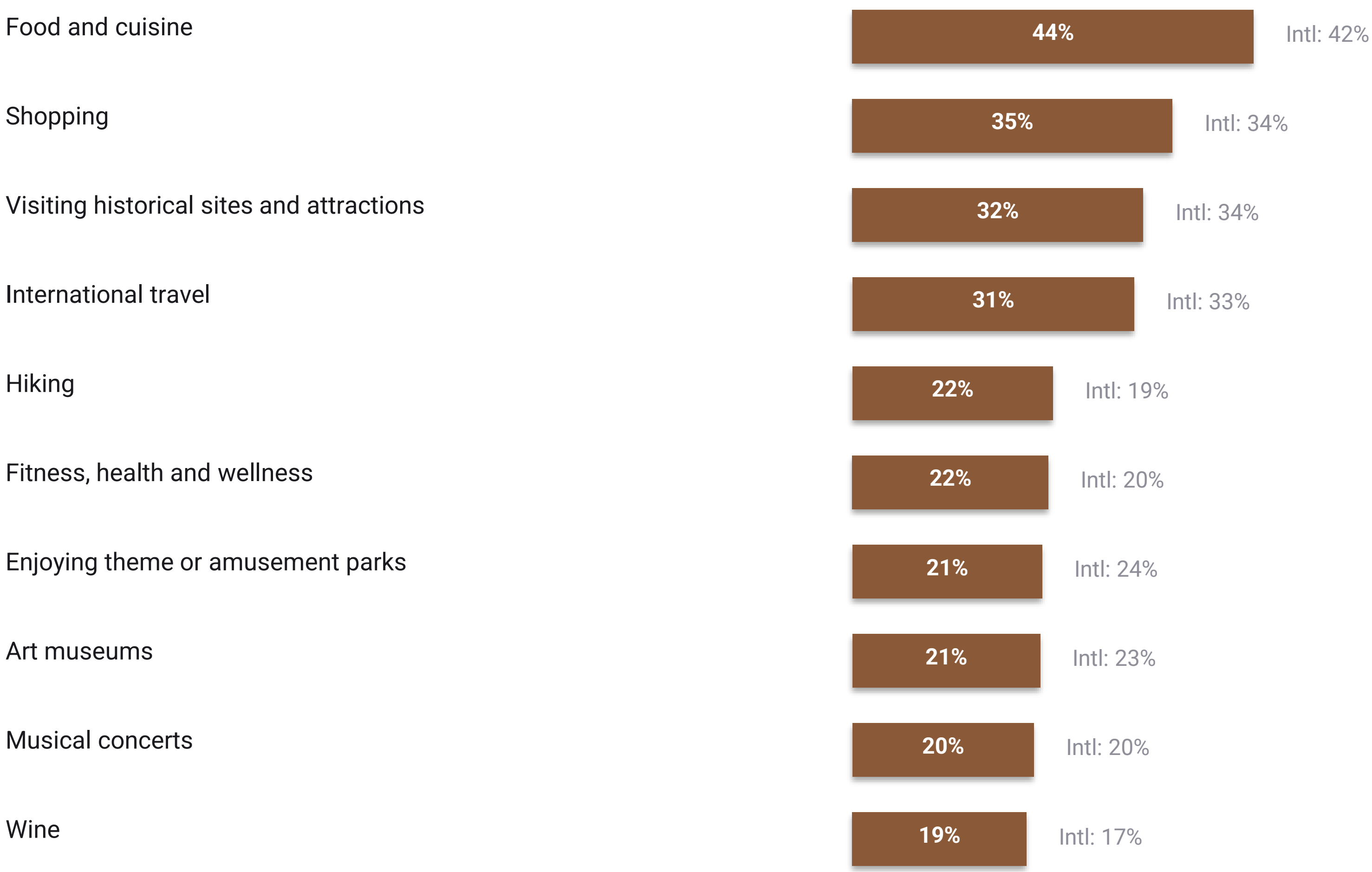
Canada



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

INDIA

Source Market Analysis | Missouri

#4 by Spending | #4 by Visits

India | Key Findings

1. **2026 Missouri projected spending:** $24.3M (+6.6% YOY). Projected visitors: 16.9K (+2.4% YOY). Ranks #4 by spending and #4 by visits among Missouri 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 (10.4%) exceeds 2015-2019 (-0.1%).
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%)

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

India

$24.3M
2026 Missouri Spending
+6.6% YOY vs. 2025

16.9K
2026 Missouri Visitors
+2.4% YOY vs. 2025

$7.1B
2026 USA Spending
+5.7% YOY vs. 2025

3.3M
2026 USA Visitors
+2.3% YOY vs. 2025

$22.8M
2025 Missouri Spending
-5.8% YOY vs. 2024

16.5K
2025 Missouri Visitors
-5.2% YOY vs. 2024

$6.8B
2025 USA Spending
-2.9% YOY vs. 2024

3.2M
2025 USA Visitors
-3.7% YOY vs. 2024

Source: Tourism Economics, Feb 2026

Growth Trajectory

2015-2019 CAGR

-0.1% Spending

0.4% Visits

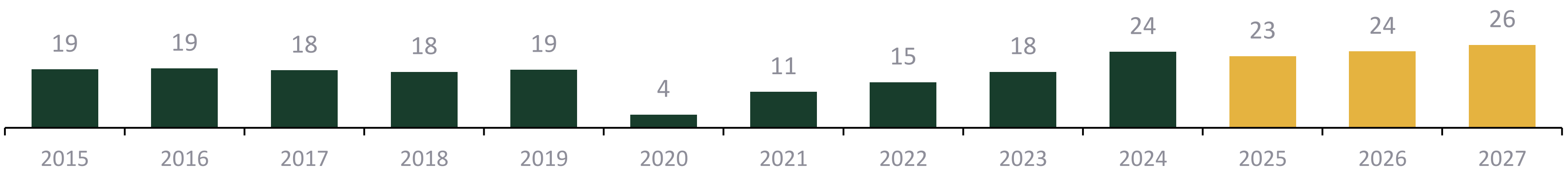
2023-2027 PROJECTED CAGR

10.4% Spending

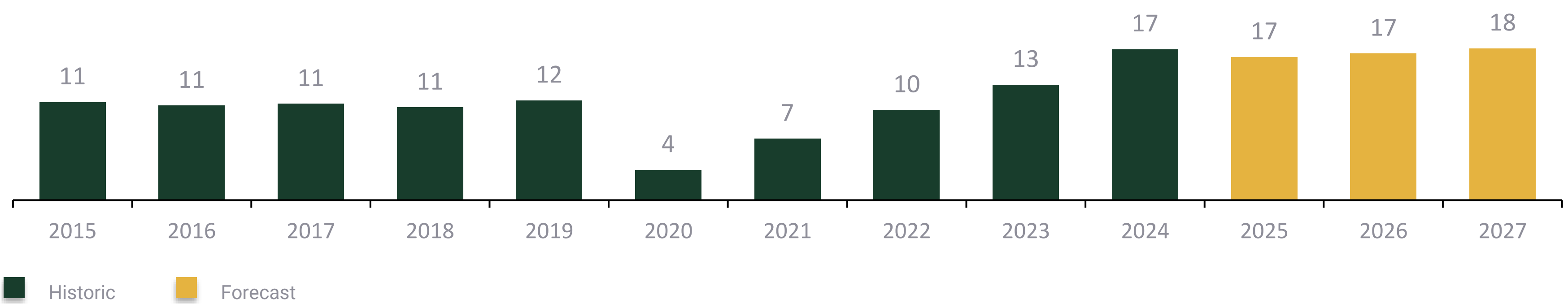
7.1% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

India

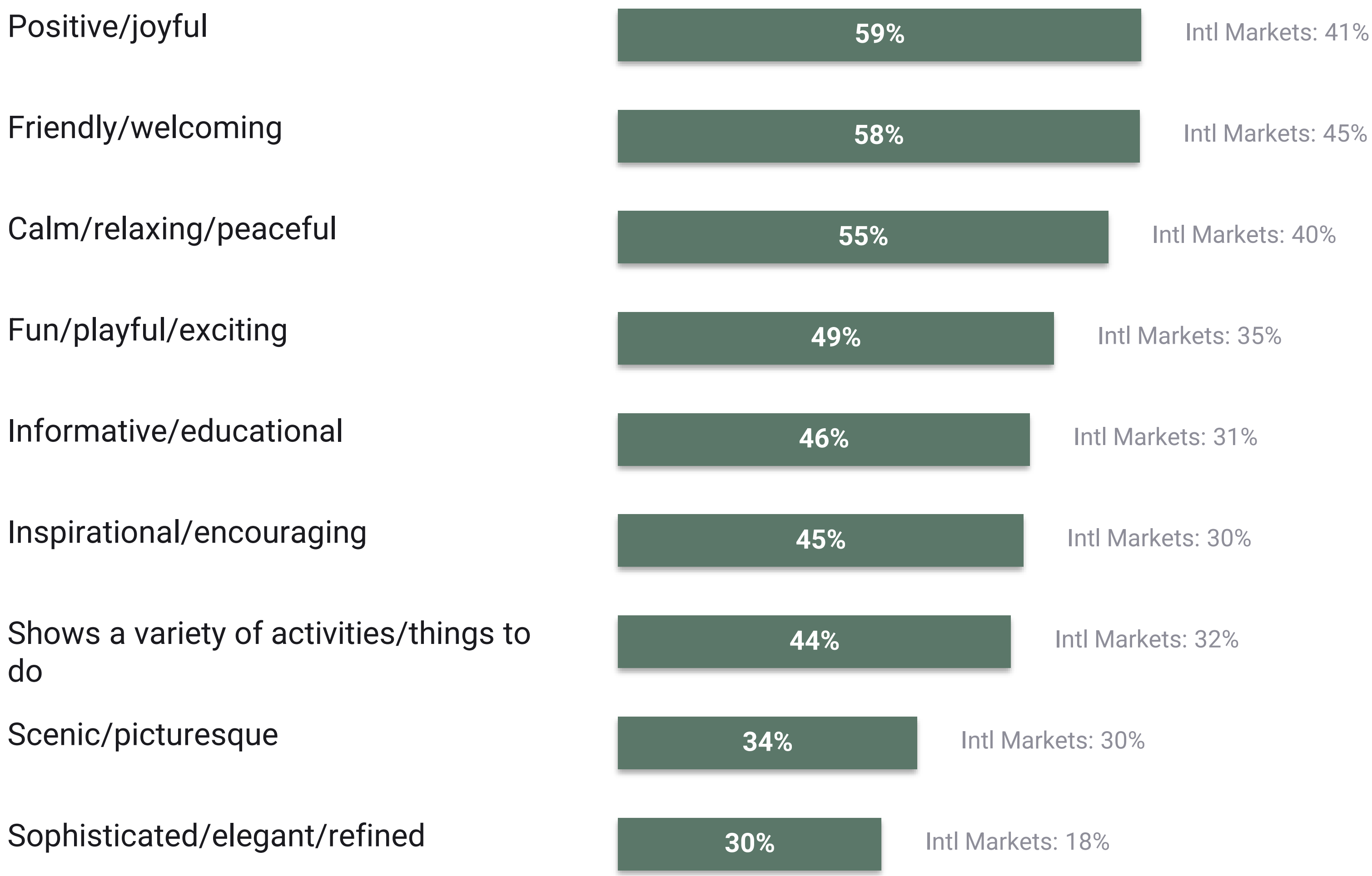
90%	90%
Familiarity	**Appeal**
Intl Markets: 67%	Intl Markets: 75%

62%	74%
Promotional Buzz	**Likely to Visit (5yr)**
Intl Markets: 29%	Intl Markets: 41%

Source: Future Partners, Mar 2026

Desired Travel Promotion Tone

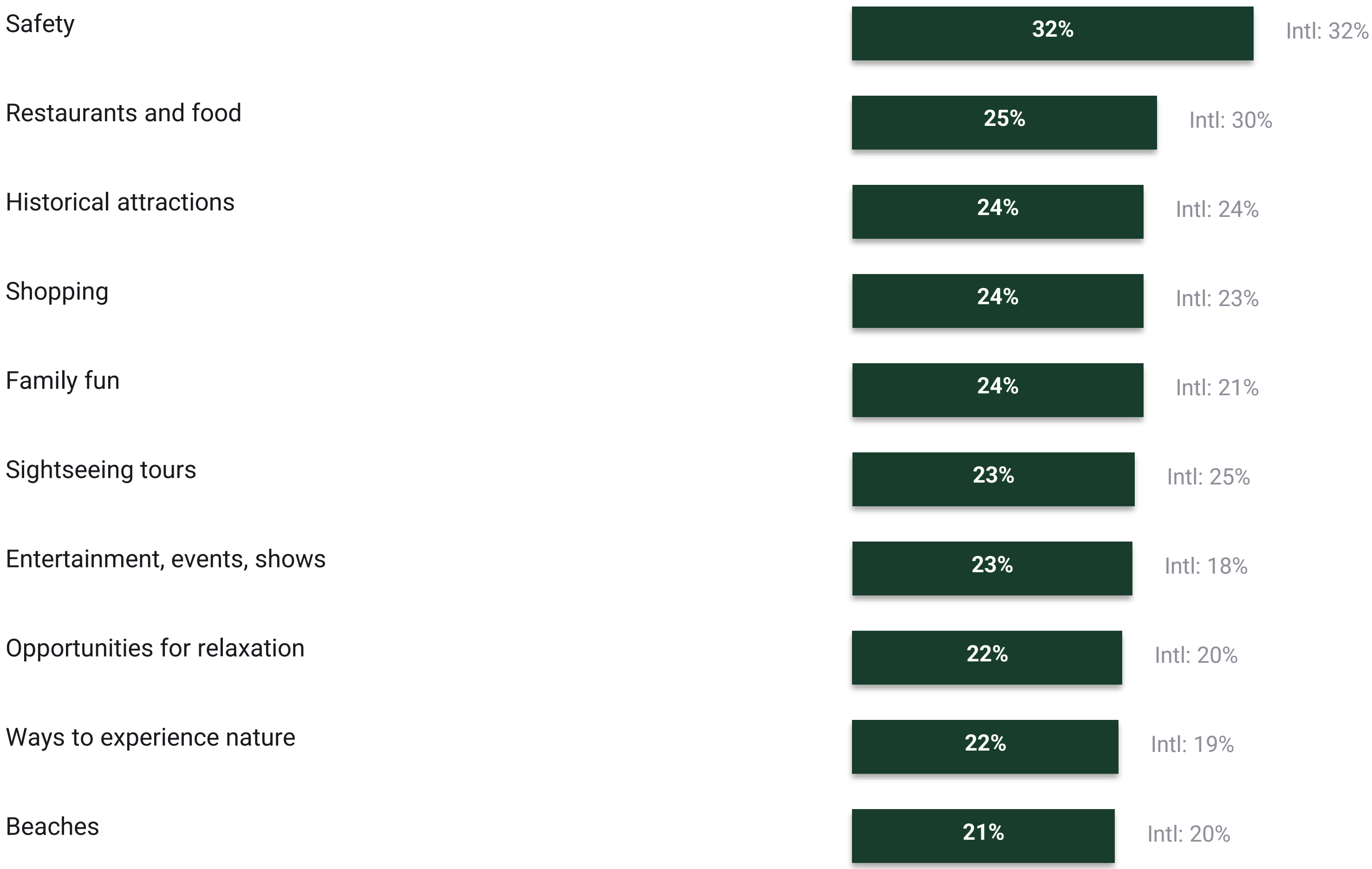
India



Source: Future Partners, Mar 2026

Top Information Sources

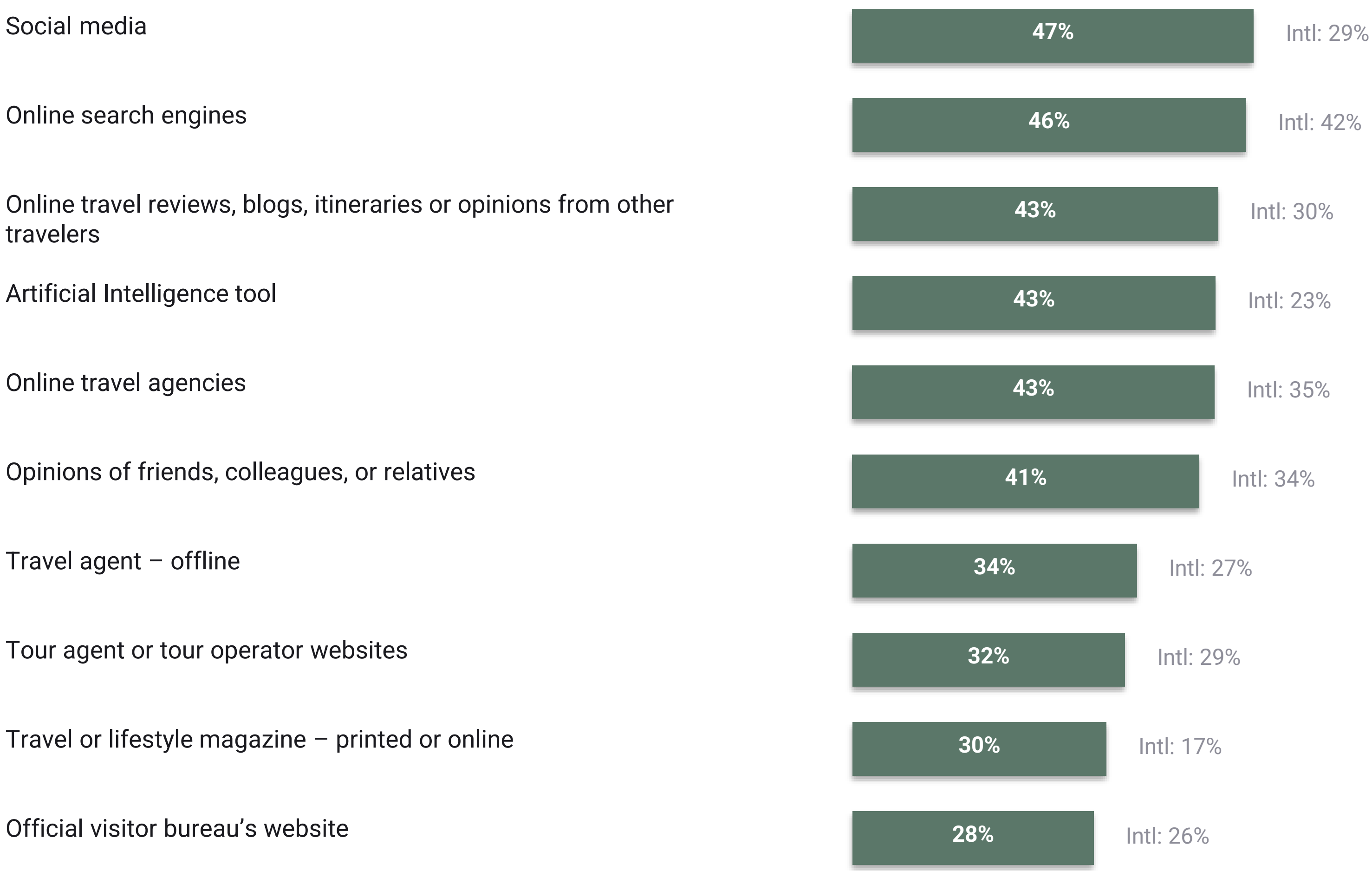
India



Source: Future Partners, Mar 2026

Planning Resources

India



Source: Future Partners, Mar 2026

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

Hotels	Shopping	Dining	Sightseeing	Transport	Total
$1,727	$1,581	$971	$1,021	$1,317	$6,617
Intl: $1,568	Intl: $1,001	Intl: $826	Intl: $881	Intl: $772	Intl: $5,049

Source: Future Partners, Mar 2026

Enablers & Barriers to Visiting

India

Enablers

To experience American cities	52%	Intl: 41%
To see beautiful landscapes/scenery	48%	Intl: 37%
To experience American culture/lifestyle	46%	Intl: 34%
There is a variety of different places to visit	43%	Intl: 37%
To visit theme parks	42%	Intl: 34%
To try local food, cuisine	41%	Intl: 29%
There is a variety of activities and attractions	40%	Intl: 32%
Diversity of the people and cultures	39%	Intl: 24%
To visit National Parks	38%	Intl: 32%
To visit friends and/or family	37%	Intl: 24%

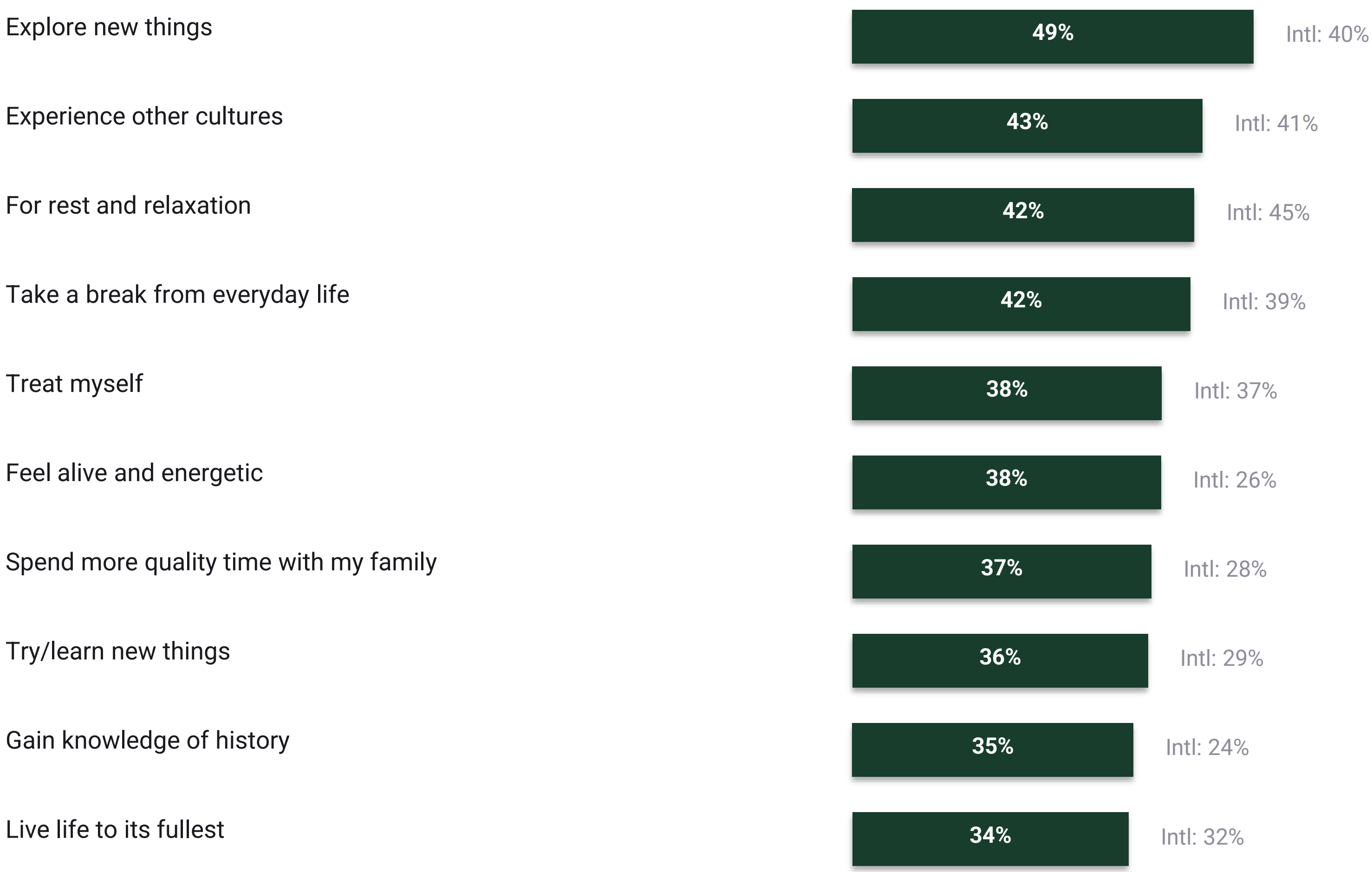
Barriers

Political issues/unrest	66%	Intl: 64%
Visa difficulties	59%	Intl: 7%
Safety concerns/it's dangerous	45%	Intl: 43%
Too expensive/bad exchange rate	43%	Intl: 31%
More interested in other places	40%	Intl: 38%
Too far away/long flight	21%	Intl: 18%
I dislike American people	12%	Intl: 14%
Been there, done that	12%	Intl: 10%
I dislike American culture	7%	Intl: 22%

Source: Future Partners, Mar 2026

Travel Motivations

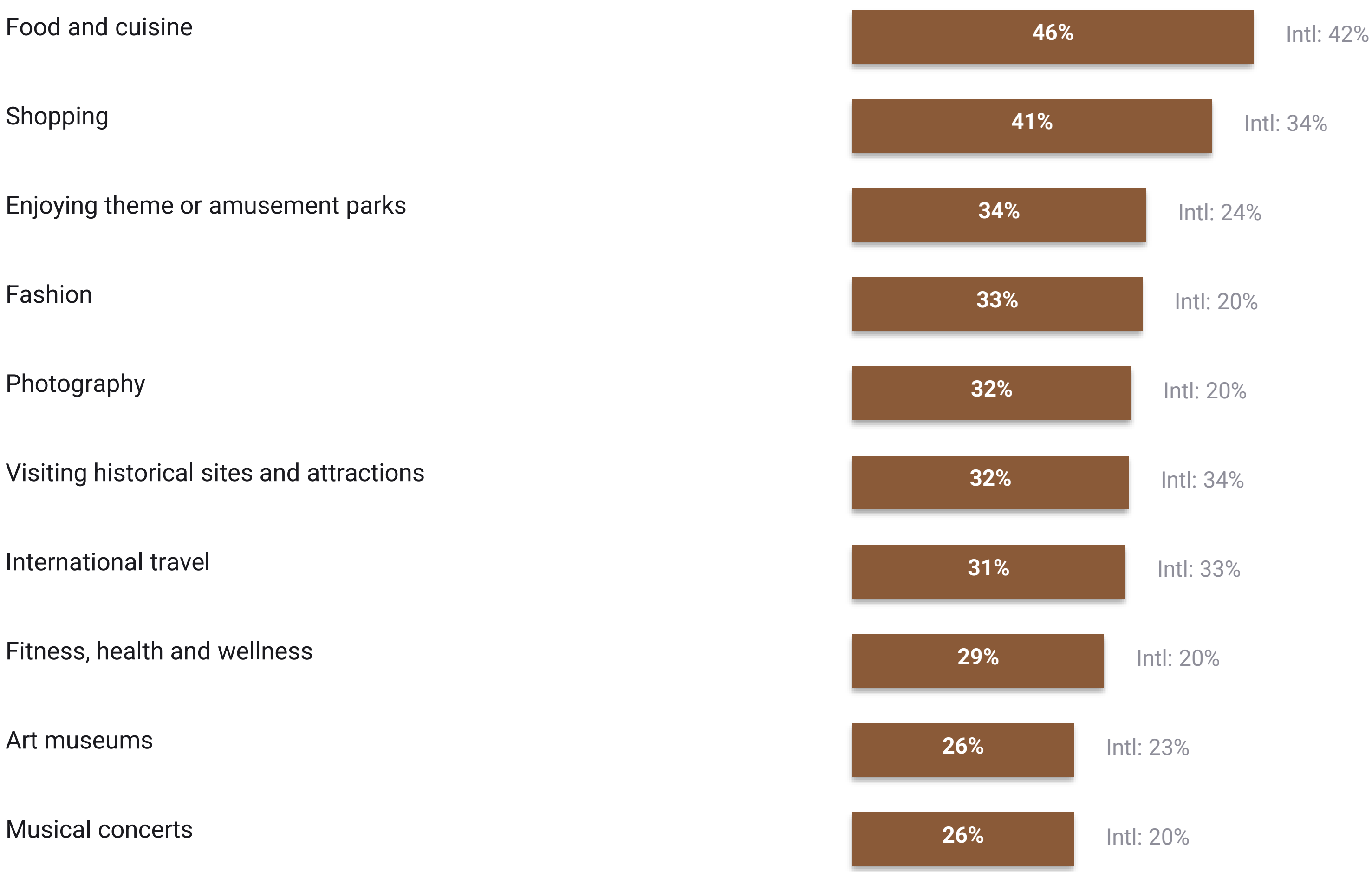
India



Source: Future Partners, Mar 2026

Hobbies & Passions

India



Source: Future Partners, Mar 2026

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

GERMANY

Source Market Analysis | Missouri

#5 by Spending | #7 by Visits

All Y'all Are Welcome

Germany | Key Findings

1. **2026 Missouri projected spending:** $20.6M (+7.3% YOY). Projected visitors: 11.5K (+3.6% YOY). Ranks #5 by spending and #7 by visits among Missouri 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 (9.3%) exceeds 2015-2019 (4%).
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

$20.6M
2026 Missouri Spending
+7.3% YOY vs. 2025

11.5K
2026 Missouri Visitors
+3.6% YOY vs. 2025

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

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

$19.2M
2025 Missouri Spending
+6.1% YOY vs. 2024

11.1K
2025 Missouri 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

4% Spending

3% Visits

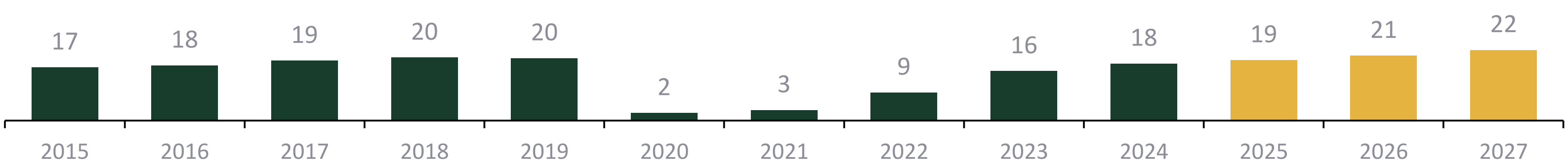
2023-2027 PROJECTED CAGR

9.3% Spending

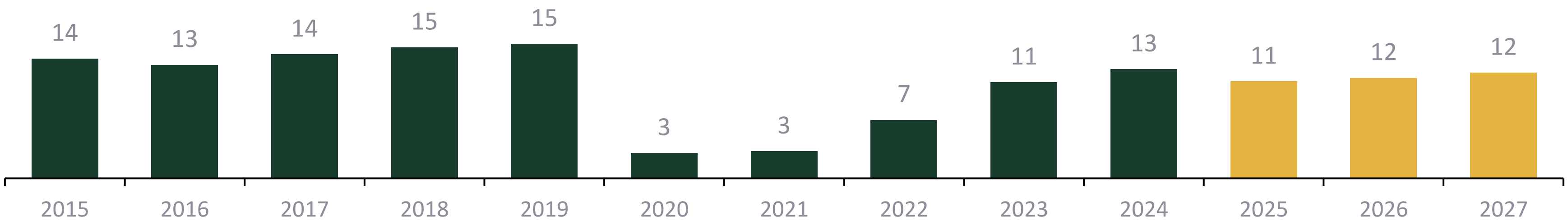
2.4% Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending ($M)



Visits (K)



Historic Forecast

Source: Tourism Economics, Feb 2026

Visitor Perceptions | The American South

Germany

67%
Familiarity
Intl Markets: 67%

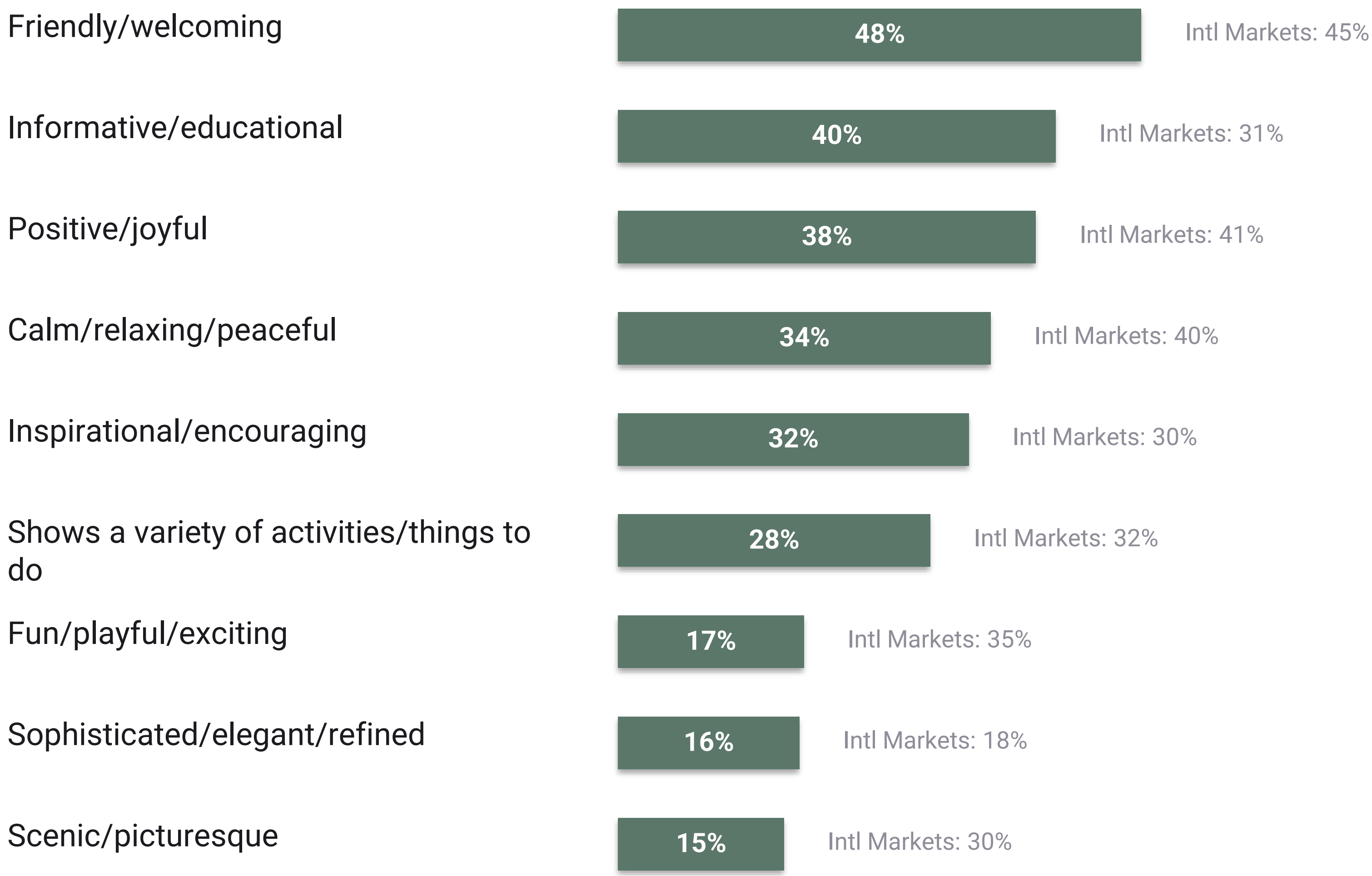
72%
Appeal
Intl Markets: 75%

28%
Promotional Buzz
Intl Markets: 29%

36%
Likely to Visit (5yr)
Intl Markets: 41%

Desired Travel Promotion Tone

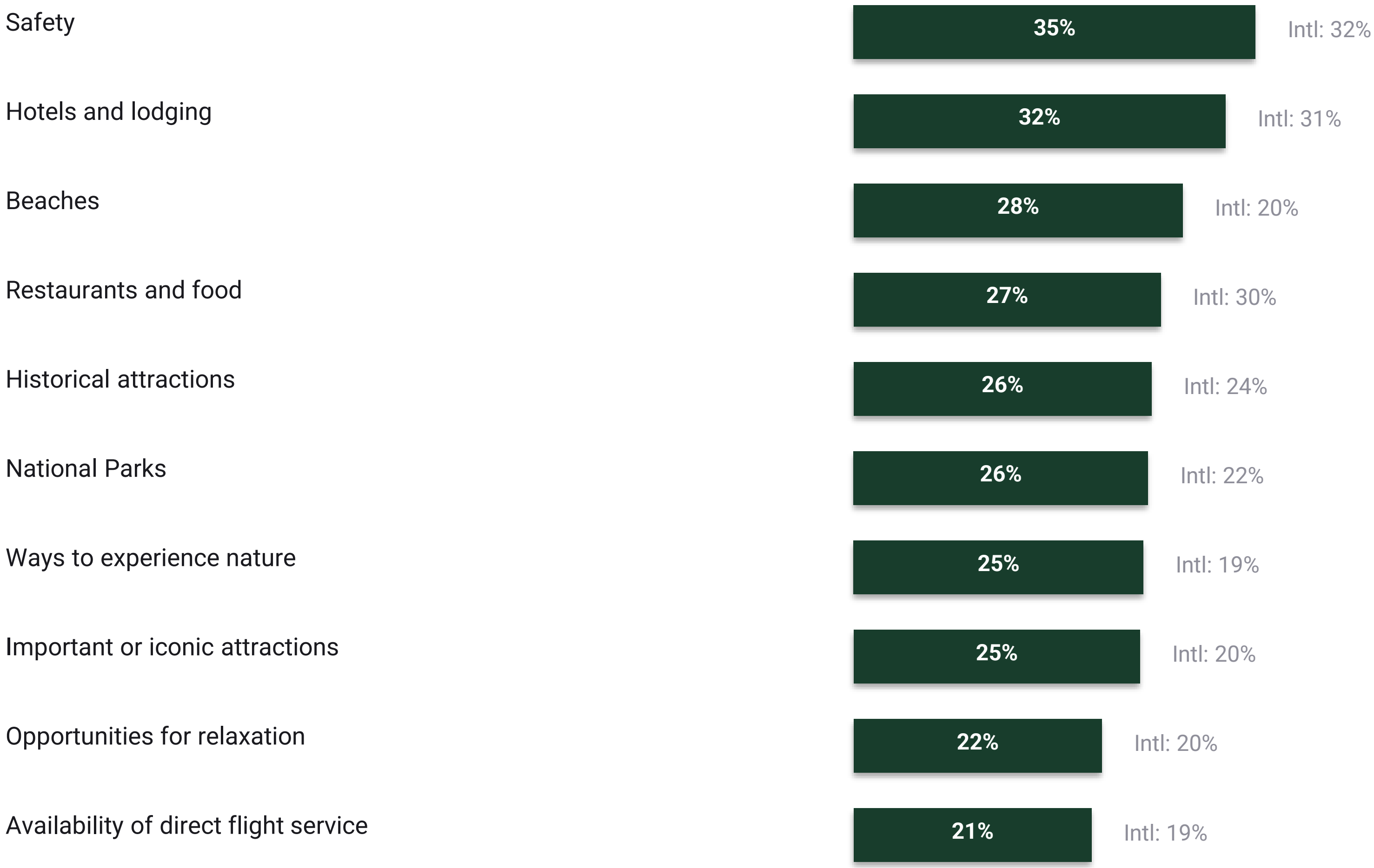
Germany



Source: Future Partners, Mar 2026

Top Information Sources

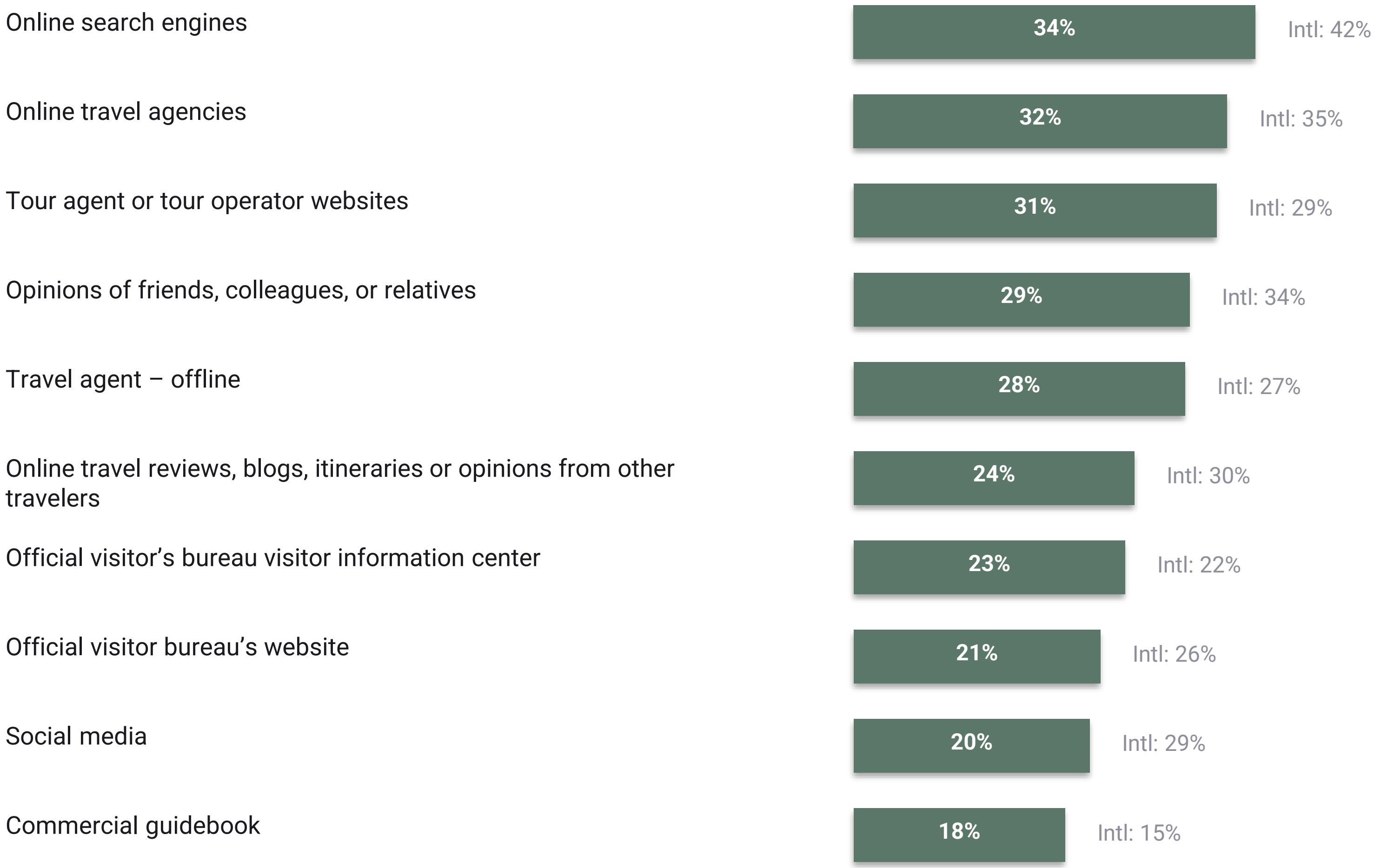
Germany



Source: Future Partners, Mar 2026

Planning Resources

Germany



Source: Future Partners, Mar 2026

U.S. Travel Planning & Budget

Germany

U.S. Trip Planning

24%	15 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

12.5	4.5	2.0
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

$1,693	$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%

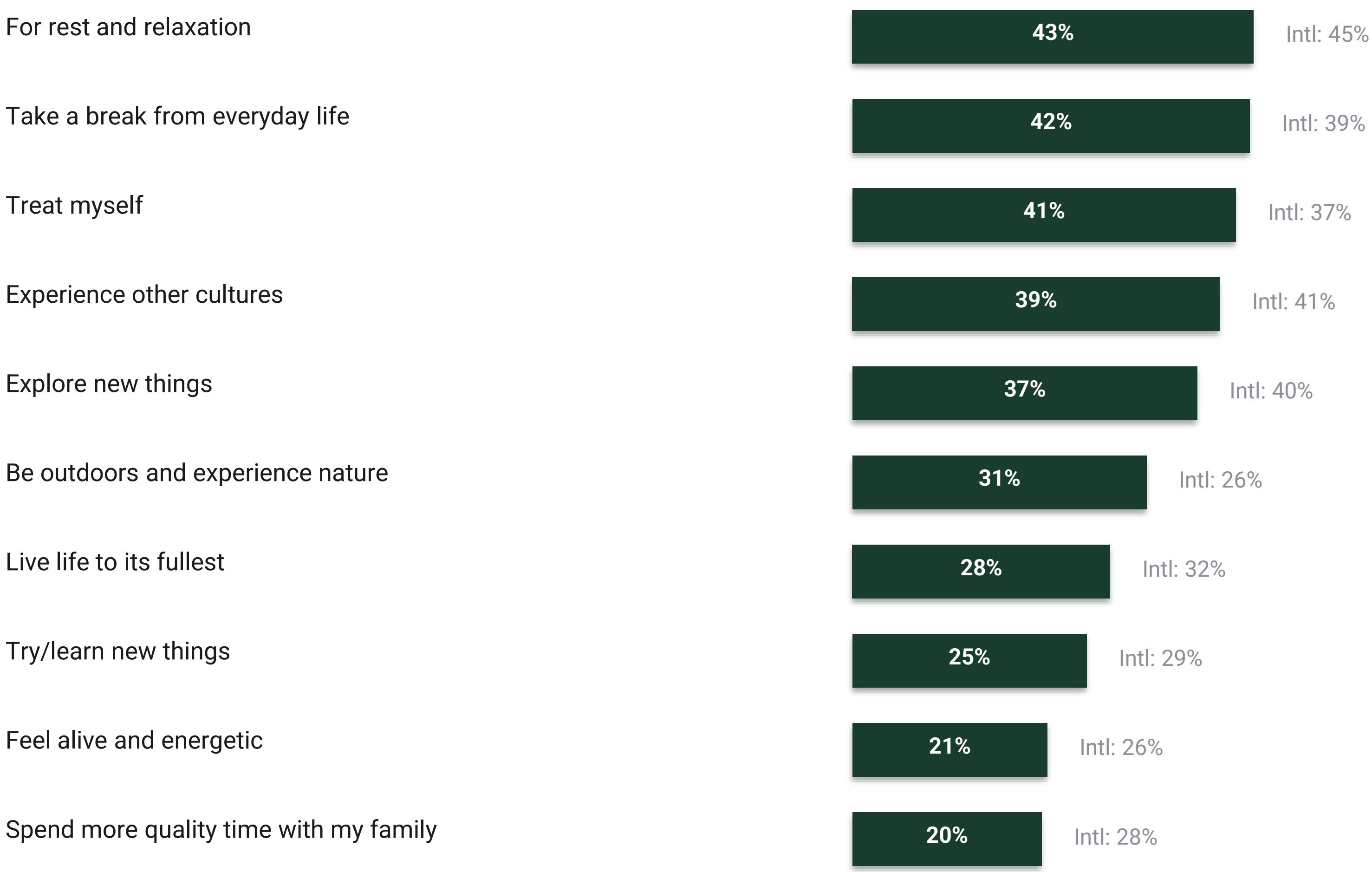
Barriers

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

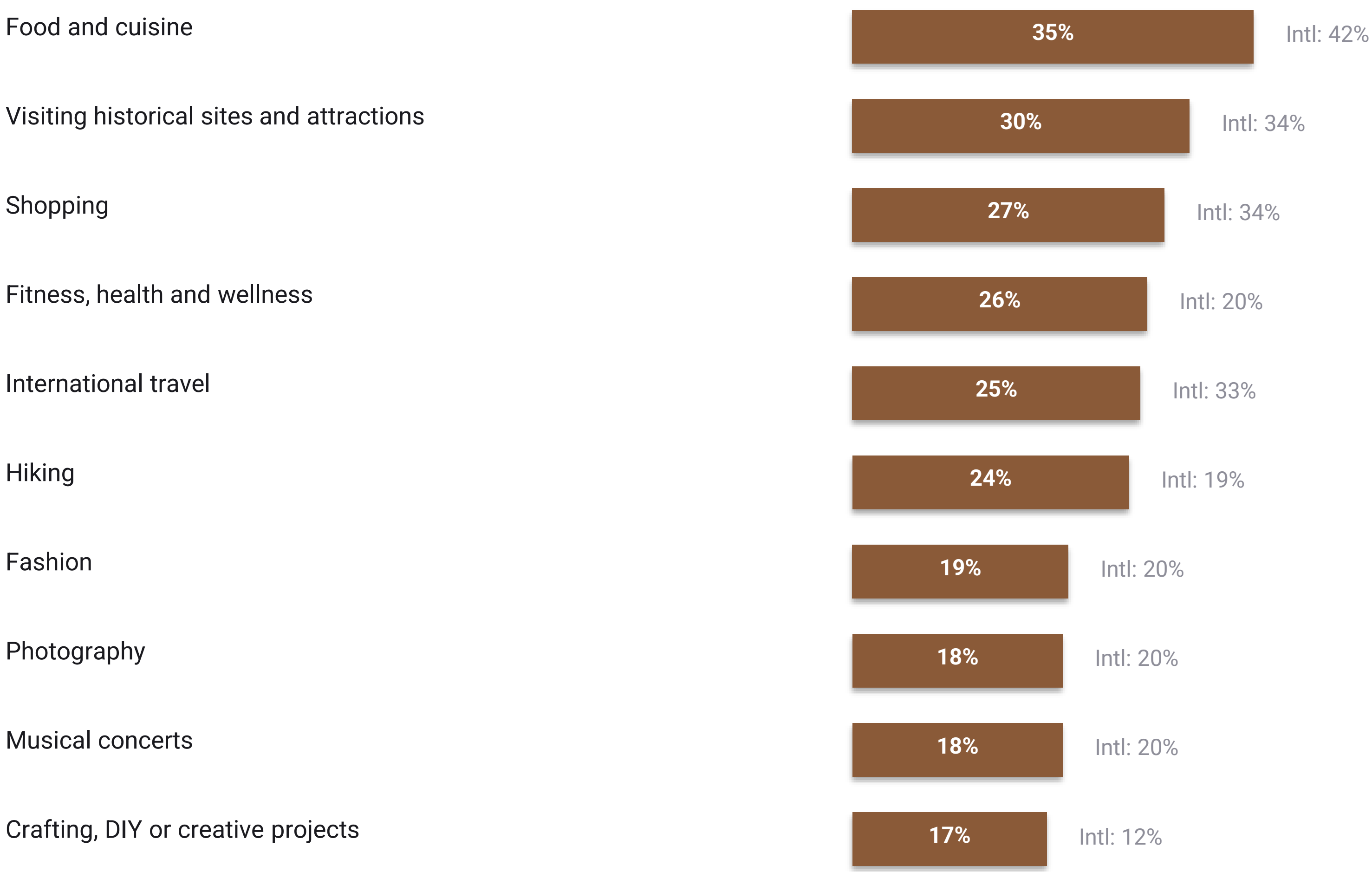
Germany



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

Source: Future Partners, Mar 2026

MISSOURI

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.

TravelSouth USA
All Y'all Are Welcome