



NORTH CAROLINA

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International Visitor Profile

# Key Findings

- 1 2026 projected spending:** \$1.2B (+5.9% YOY). Projected visitors: 819.0K (+4.7% YOY).
- 2 Top 10 Source Markets by Spending:** Canada (\$176.9M), UK + Ireland (\$149.2M), China (\$110.3M), DACH Region (\$85.2M), India (\$83.5M), Brazil (\$65.7M), Australia (\$37.6M), Japan (\$24.4M), Nordics (\$22.2M), France (\$21.1M).
- 3 Top 5 Growth Markets (Spending YOY):** Taiwan (+16.3%), Israel (+15.3%), Bulgaria (+15.0%), Singapore (+13.1%), Indonesia (+11.4%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-11.1%), Turkey (-2.1%), Greece (-0.3%).
- 5** Canada leads by spending (\$176.9M). Canada leads by visits (288.0K).
- 6 CAGR:** 2023-2027 projected spending CAGR (7.5%) exceeds 2015-2019 (4.2%).
- 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%)

# North Carolina

**\$1.2B**

2026 Projected Spending

**+5.9% YOY** vs. 2025

**\$988.4M**

2026 Overseas Spending

**+5.3% YOY** vs. 2025

**\$1.1B**

2025 Projected Spending

**-2.8% YOY** vs. 2024

**\$939.1M**

2025 Overseas Spending

**+2.9% YOY** vs. 2024

**819.0K**

2026 Projected Visitors

**+4.7% YOY** vs. 2025

**501.6K**

2026 Overseas Visitors

**+3.0% YOY** vs. 2025

**782.6K**

2025 Projected Visitors

**-13.2% YOY** vs. 2024

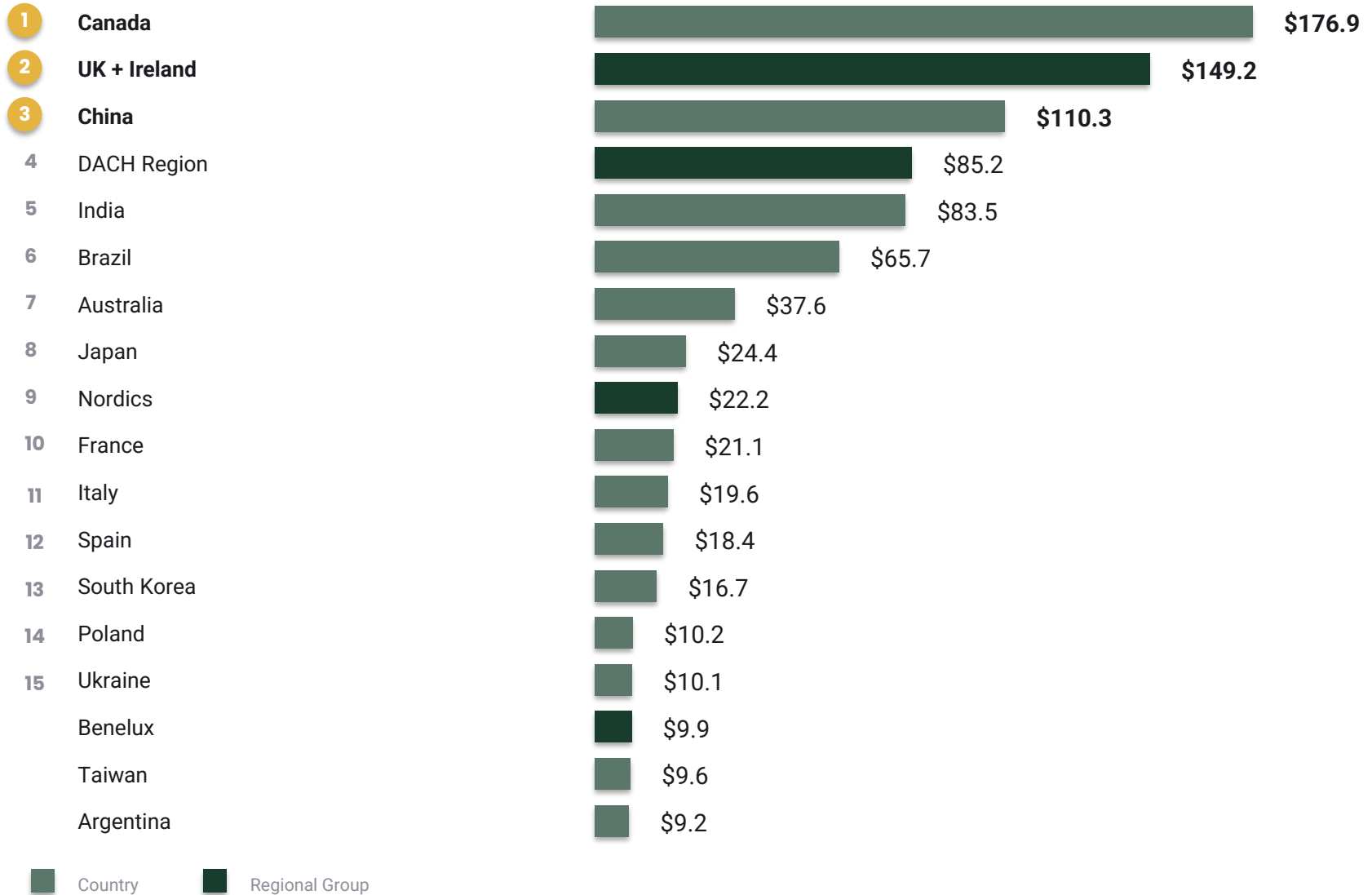
**487.0K**

2025 Overseas Visitors

**-3.4% YOY** vs. 2024

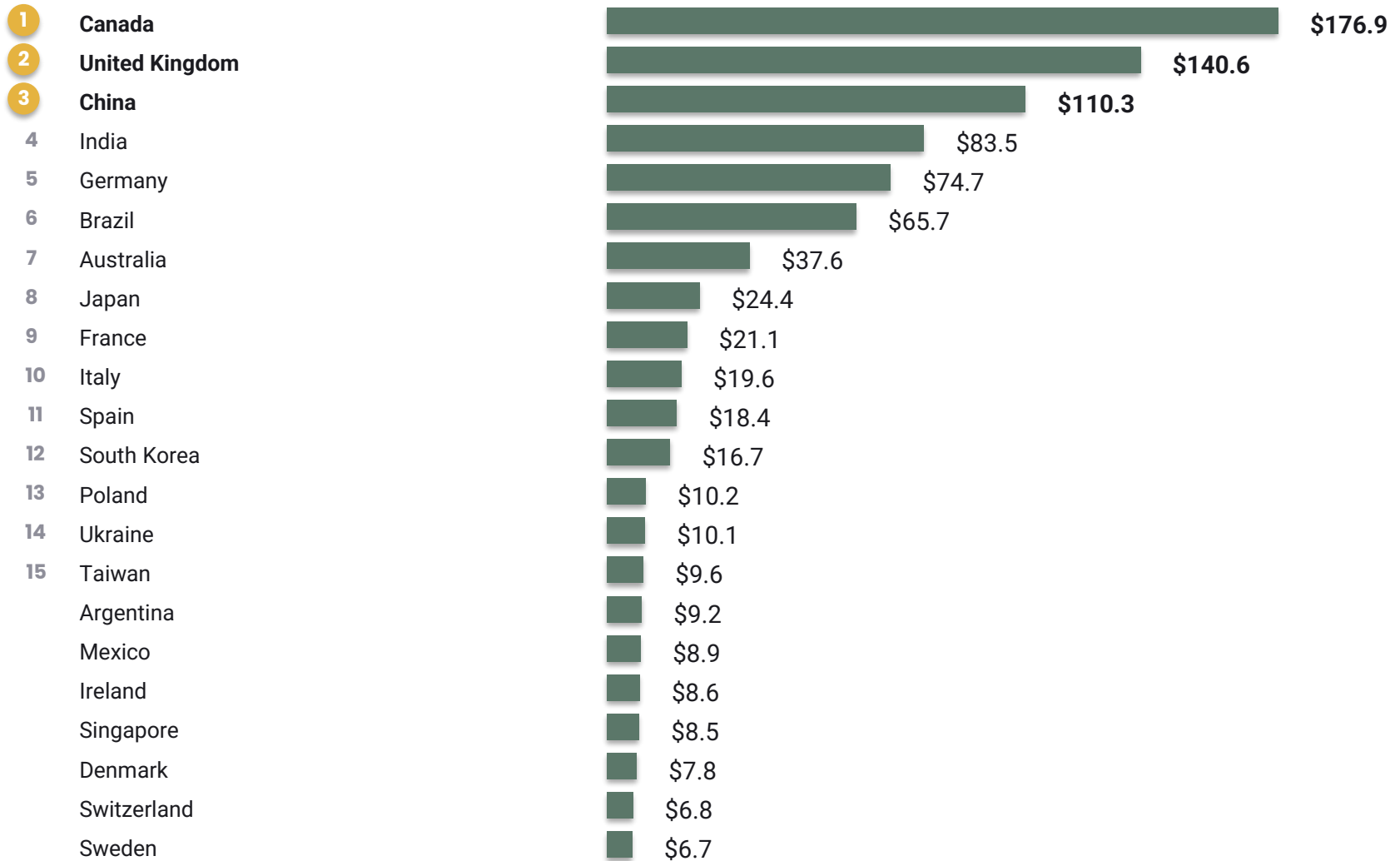
# Top Source Markets | 2026 Projections

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	\$176.9	288.0	+9.5%	+7.9%
2	United Kingdom	\$140.6	65.7	+3.9%	+5.3%
3	China	\$110.3	33.8	+5.1%	+4.6%
4	India	\$83.5	52.2	+5.8%	+1.1%
5	Germany	\$74.7	40.5	+7.4%	+3.2%
6	Brazil	\$65.7	23.6	+7.0%	+3.4%
7	Australia	\$37.6	15.3	+6.6%	+4.3%
8	Japan	\$24.4	15.9	+7.1%	+7.8%
9	France	\$21.1	15.3	+3.5%	+1.4%
10	Italy	\$19.6	13.6	+3.9%	+1.5%
11	Spain	\$18.4	11.9	+10.1%	+2.4%
12	South Korea	\$16.7	12.8	+6.5%	+7.2%
13	Poland	\$10.2	5.2	+1.2%	-3.2%
14	Ukraine	\$10.1	1.2	+6.3%	+1.1%
15	Taiwan	\$9.6	5.7	+16.3%	+7.1%
16	Argentina	\$9.2	5.9	+7.0%	+4.4%
17	Mexico	\$8.9	29.5	+6.6%	+2.5%
18	Ireland	\$8.6	6.0	+3.5%	+2.1%
19	Singapore	\$8.5	2.8	+13.1%	+6.1%
20	Denmark	\$7.8	4.0	+7.2%	+4.5%
21	Switzerland	\$6.8	3.8	+9.9%	+4.6%
22	Sweden	\$6.7	5.7	+7.0%	+4.1%

# % Change | 2025 Projections vs. 2024

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

#	Market	Spending %Δ	Visits %Δ
1	Canada	-26.9%	-28.0%
2	United Kingdom	+13.2%	+0.5%
3	China	+4.3%	-4.1%
4	India	-5.6%	-5.7%
5	Germany	+6.9%	-10.7%
6	Brazil	+14.5%	+0.2%
7	Australia	-15.4%	-6.3%
8	Japan	+11.0%	+5.5%
9	France	-2.7%	-6.4%
10	Italy	+13.0%	+5.1%
11	Spain	+12.8%	+1.3%
12	South Korea	-15.6%	-5.5%
13	Poland	-3.1%	+4.3%
14	Ukraine	+33.8%	+5.8%
15	Taiwan	+31.9%	+7.4%
16	Argentina	+12.8%	+14.8%
17	Mexico	+4.8%	+8.6%
18	Ireland	-1.9%	+0.5%
19	Singapore	-2.8%	-7.1%
20	Denmark	-24.9%	-23.2%
21	Switzerland	-22.1%	-10.5%
22	Sweden	-13.9%	-6.1%

 Decline  Growth

# Growth Trajectory

2015-2019 CAGR

**4.2%**

Spending

**2.9%**

Visits

2023-2027 PROJECTED CAGR

**7.5%**

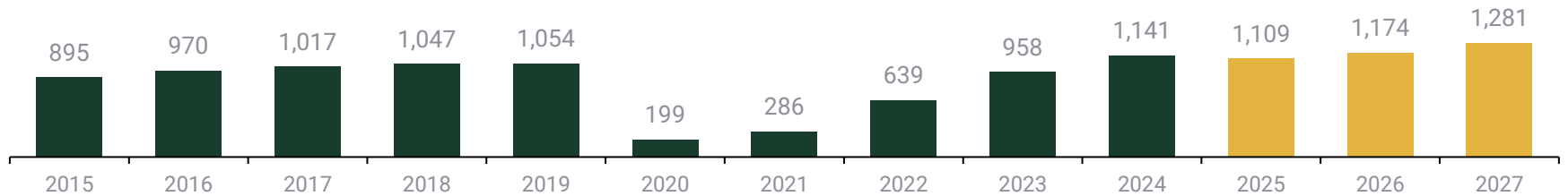
Spending

**0.9%**

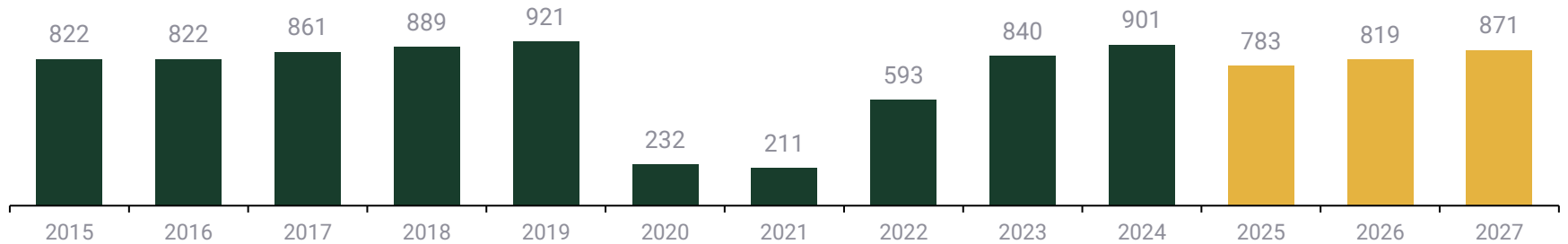
Visits

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

## United Kingdom

**1.3%**

GDP % Change

**1.35**

GBP/USD

## China

**4.2%**

GDP % Change

**6.84**

CNY/USD

## India

**6.2%**

GDP % Change

**90.92**

INR/USD

## Germany

**0.9%**

GDP % Change

**1.18**

EUR/USD

## Brazil

**1.9%**

GDP % Change

**5.15**

BRL/USD

## Australia

**2.1%**

GDP % Change

**0.71**

AUD/USD

## Japan

**0.6%**

GDP % Change

**156.13**

JPY/USD

## France

**0.9%**

GDP % Change

**1.18**

EUR/USD

## Italy

**0.8%**

GDP % Change

**1.18**

EUR/USD

# Visitor Perceptions | The American South

International Markets

**67%**

**Familiarity**

**75%**

**Appeal**

**29%**

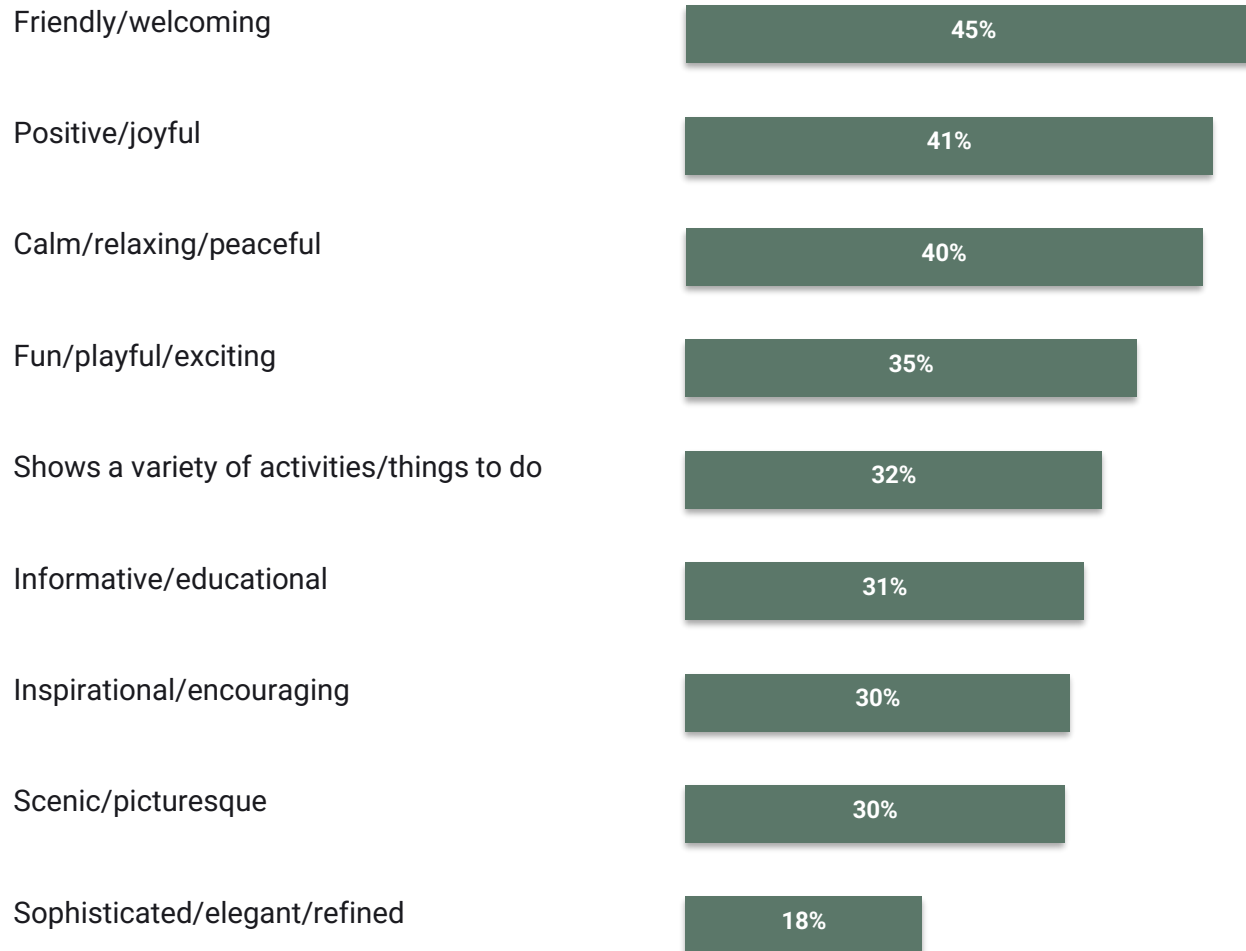
**Promotional Buzz**

**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**

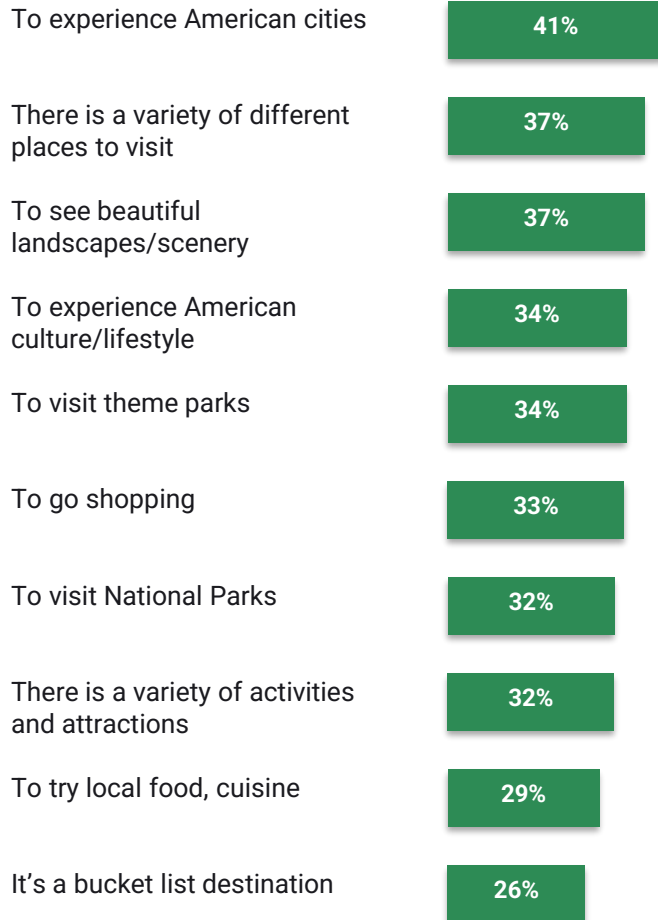
Total

Intl: \$5,049

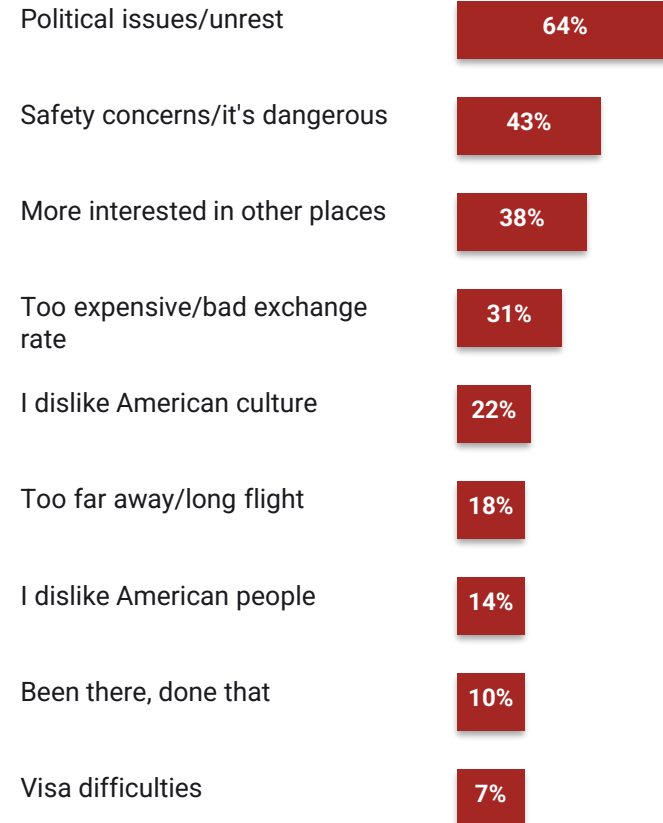
# Enablers & Barriers to Visiting

International Markets

## Enablers

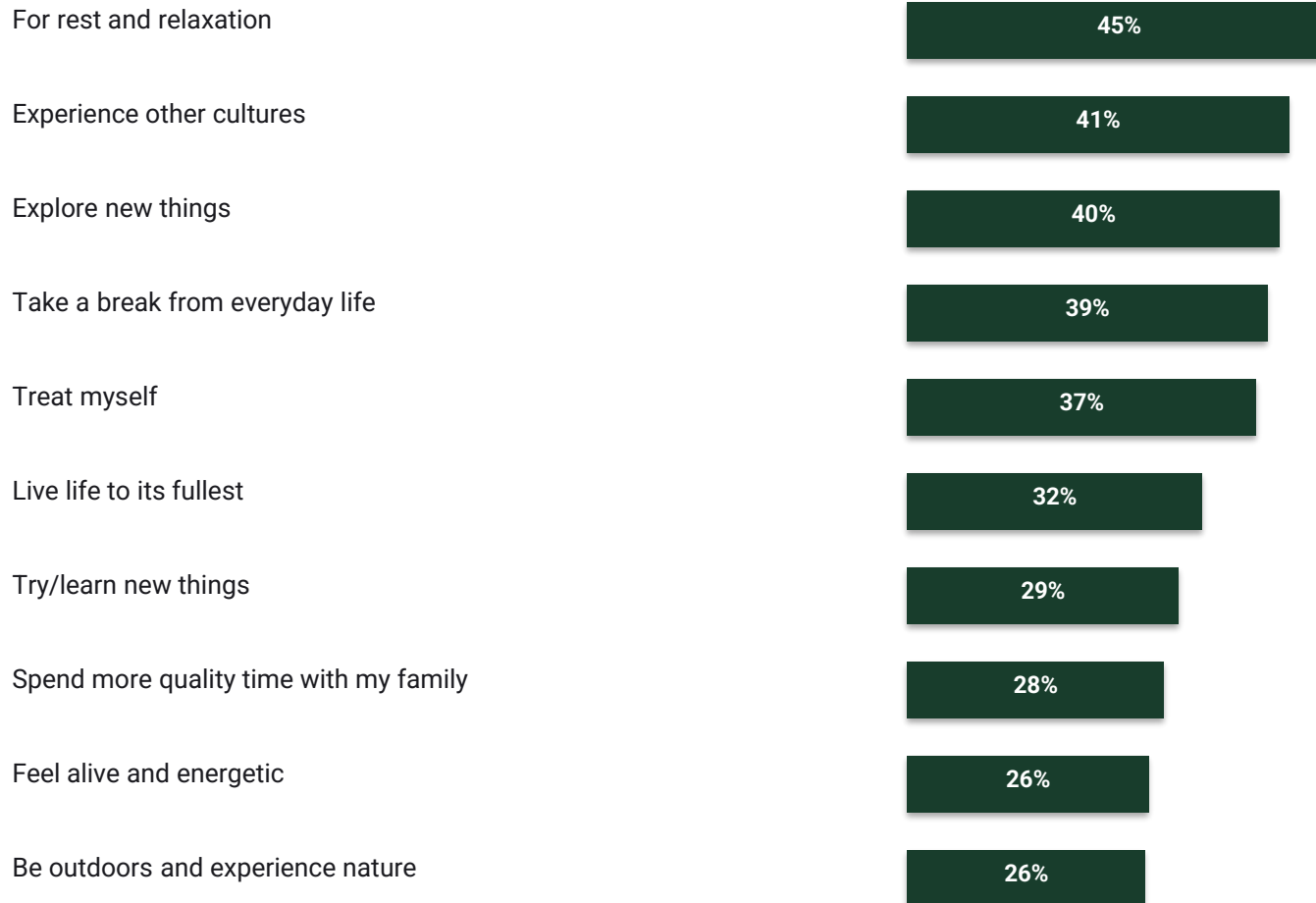


## Barriers



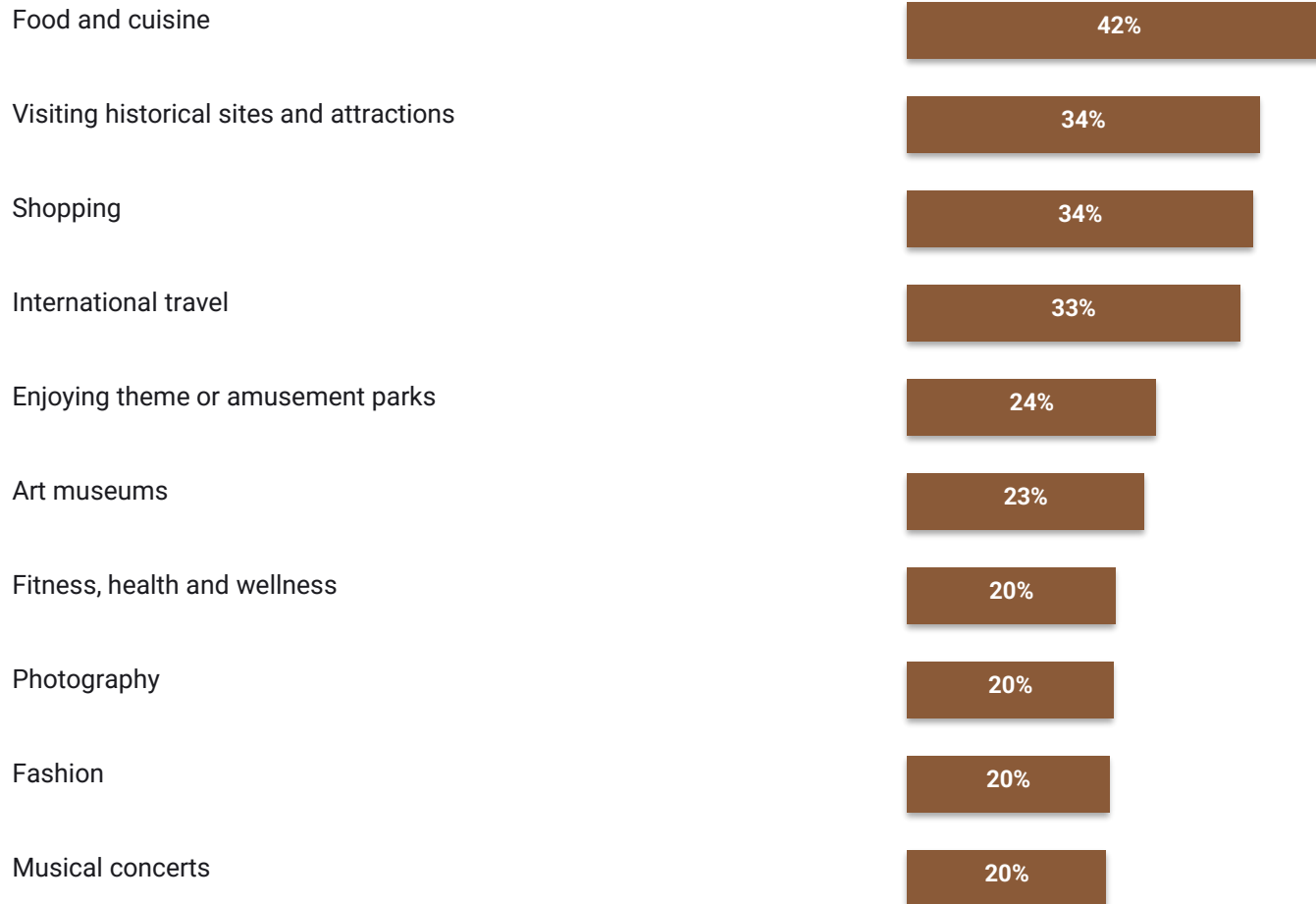
# Travel Motivations

## International Markets



# Hobbies & Passions

International Markets



# Travel Trends & Outlook

## International Markets

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

**54%**

A horizontal bar chart with a dark green bar representing 54% of the total length, followed by a light gray bar representing the remaining 46%.

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

**53%**

A horizontal bar chart with a dark green bar representing 53% of the total length, followed by a light gray bar representing the remaining 47%.

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

**44%**

A horizontal bar chart with a brown bar representing 44% of the total length, followed by a light gray bar representing the remaining 56%.

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

**43%**

A horizontal bar chart with a yellow bar representing 43% of the total length, followed by a light gray bar representing the remaining 57%.

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

**42%**

A horizontal bar chart with a green bar representing 42% of the total length, followed by a light gray bar representing the remaining 58%.

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

**42%**

A horizontal bar chart with a dark green bar representing 42% of the total length, followed by a light gray bar representing the remaining 58%.

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

**39%**

A horizontal bar chart with a dark green bar representing 39% of the total length, followed by a light gray bar representing the remaining 61%.

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

**34%**

A horizontal bar chart with a brown bar representing 34% of the total length, followed by a light gray bar representing the remaining 66%.

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

**27%**

A horizontal bar chart with a yellow bar representing 27% of the total length, followed by a light gray bar representing the remaining 73%.

# Top Five Markets by Spending

International Visitor Economy & Profiles by Country

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# CANADA

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Source Market Analysis | North Carolina

#1 by Spending | #1 by Visits

A stylized, hand-drawn logo for North Carolina, featuring the letters 'NC' in a bold, black, brush-stroke font.

NORTH CAROLINA

TravelSouth  
All Y'all Are Welcome USA

# Canada | Key Findings

- 1 2026 North Carolina projected spending:** \$176.9M (+9.5% YOY). Projected visitors: 288K (+7.9% YOY). Ranks #1 by spending and #1 by visits among North Carolina source markets.
- 2 Macro Context:** Canada 2026 GDP growth projected at 1.5%. Exchange rate: 1.37 CAD/USD.
- 3 CAGR Comparison:** 2023-2027 projected spending CAGR (-1.3%) trails 2015-2019 (-0.4%).
- 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

**\$176.9M**

2026 North Carolina Spending

**+9.5% YOY** vs. 2025

**288K**

2026 North Carolina Visitors

**+7.9% YOY** vs. 2025

**\$16.4B**

2026 USA Spending

**+7.6% YOY** vs. 2025

**20.9M**

2026 USA Visitors

**+6.6% YOY** vs. 2025

**\$161.5M**

2025 North Carolina Spending

**-26.8% YOY** vs. 2024

**266.9K**

2025 North Carolina Visitors

**-28% 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

**-0.4%**

Spending

**1.4%**

Visits

2023-2027 PROJECTED CAGR

**-1.3%**

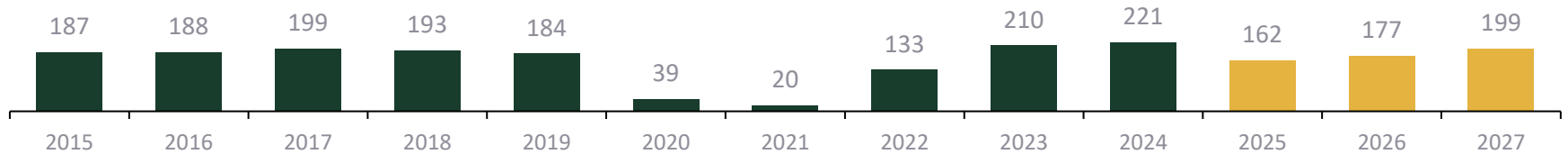
Spending

**-4.6%**

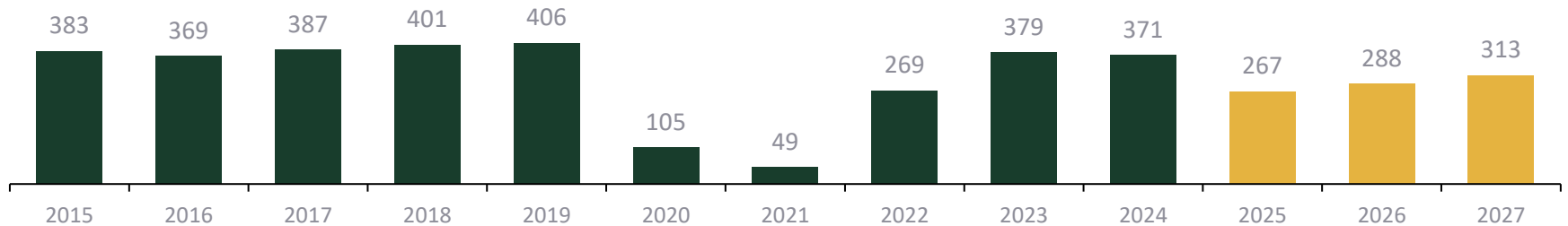
Visits

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%

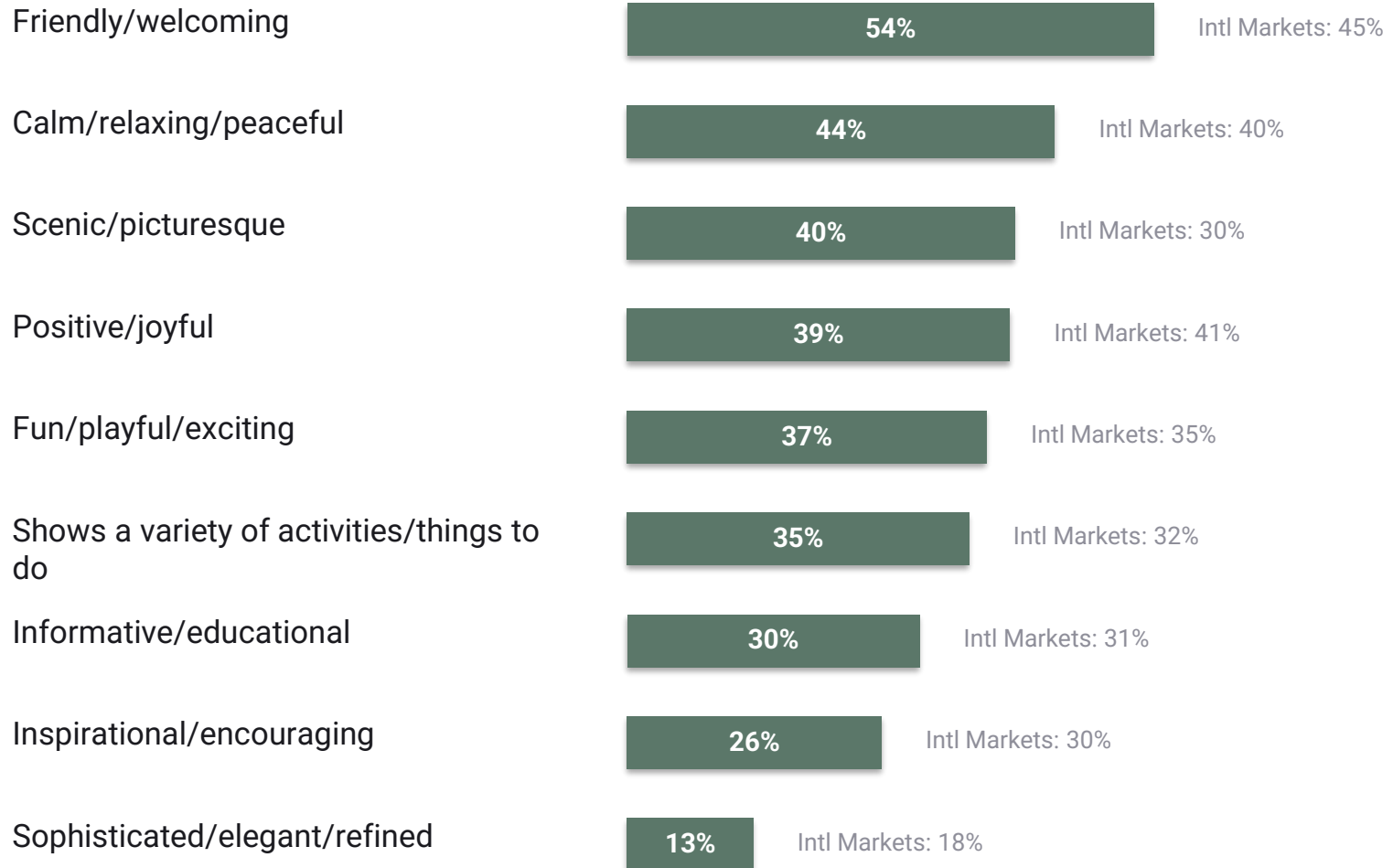
**38%**

**Likely to Visit (5yr)**

Intl Markets: 41%

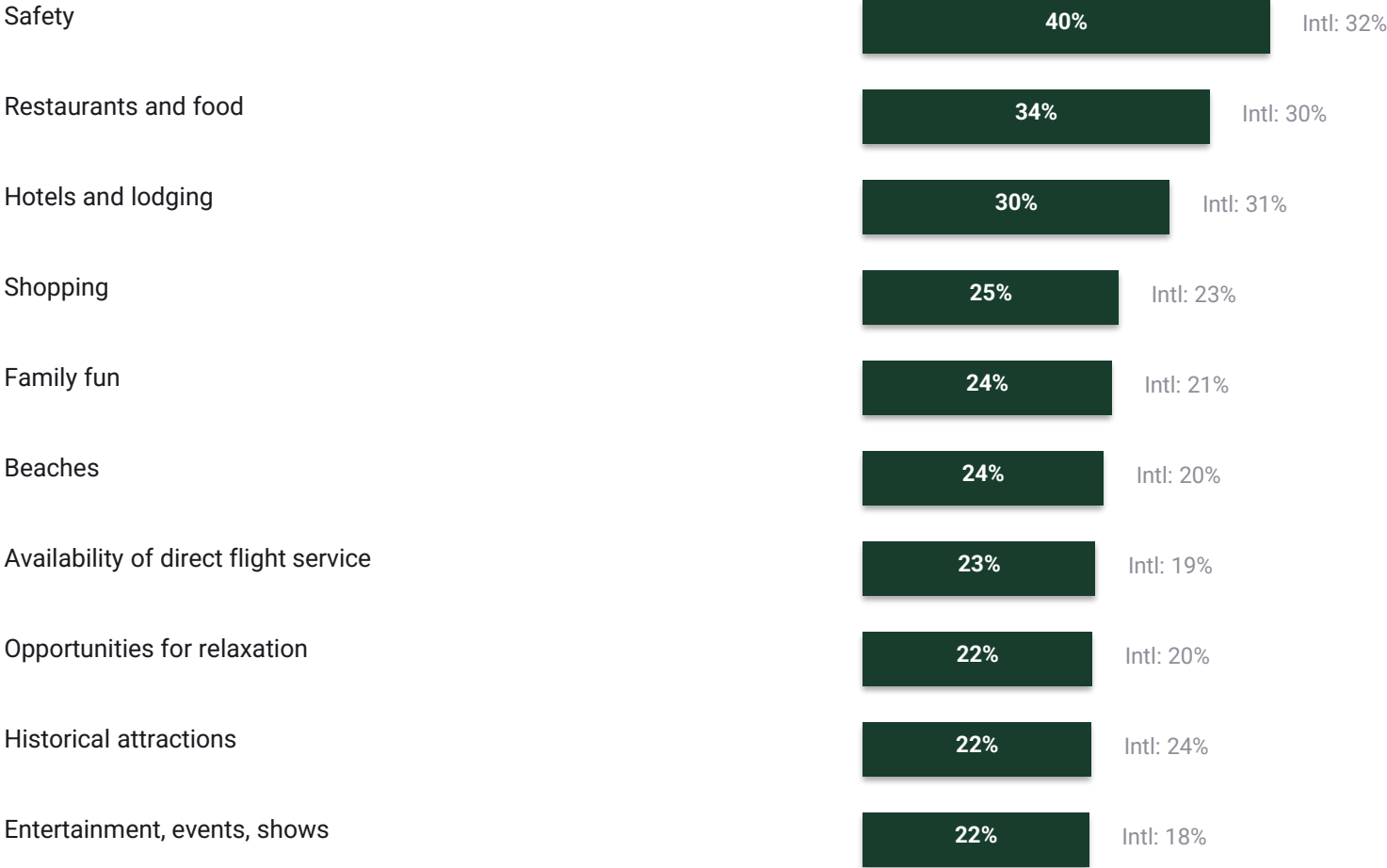
# Desired Travel Promotion Tone

Canada



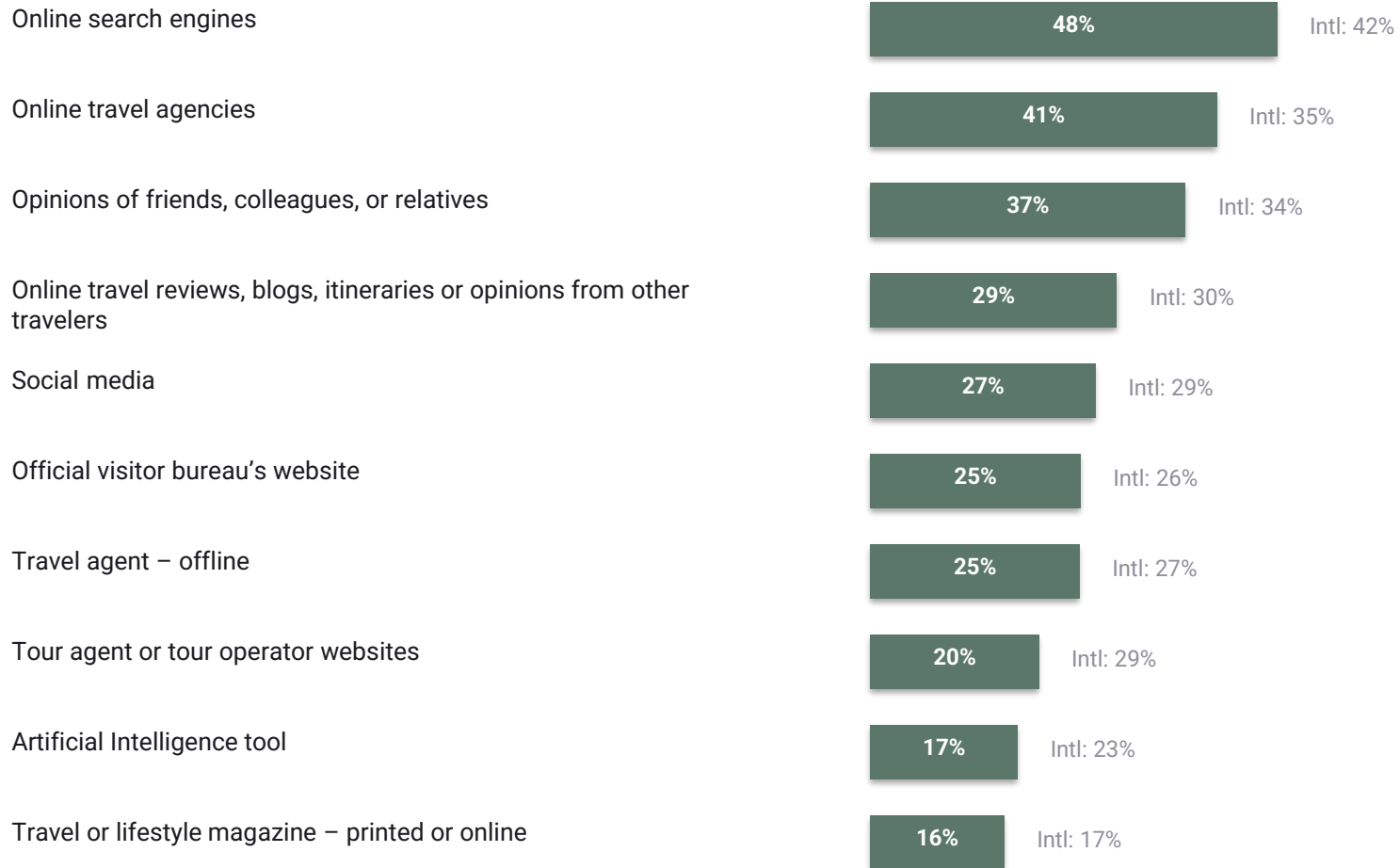
# Top Information Sources

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**

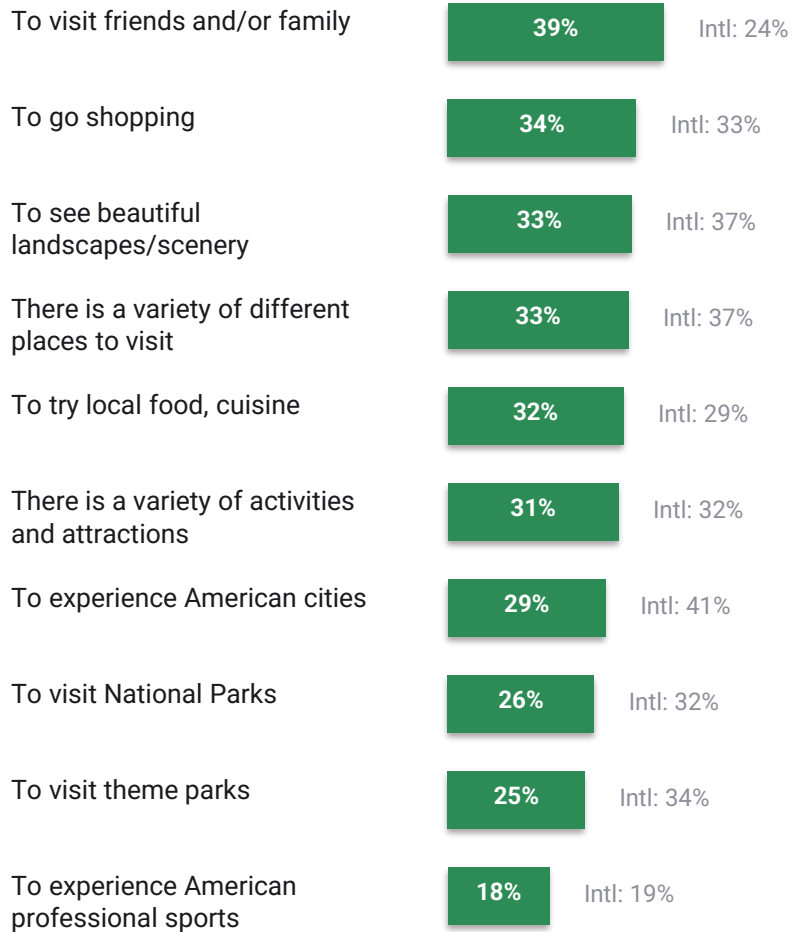
Total

Intl: \$5,049

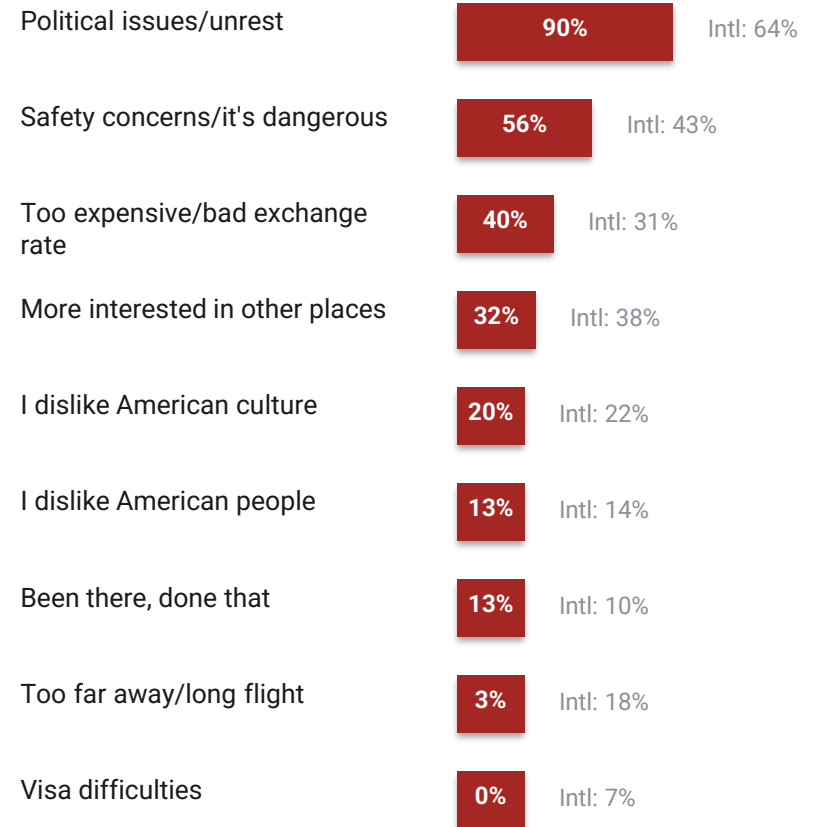
# Enablers & Barriers to Visiting

Canada

## Enablers

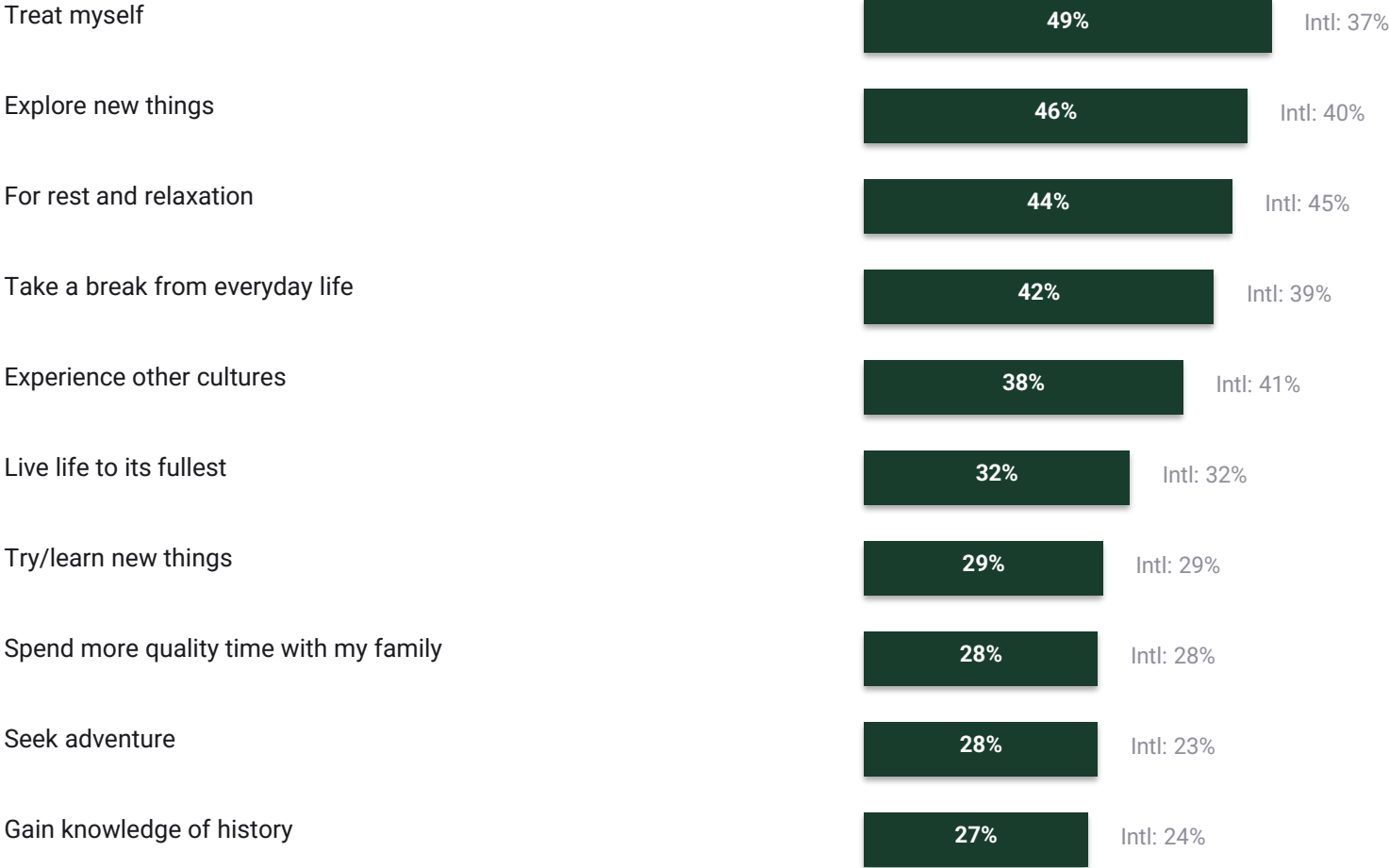


## Barriers



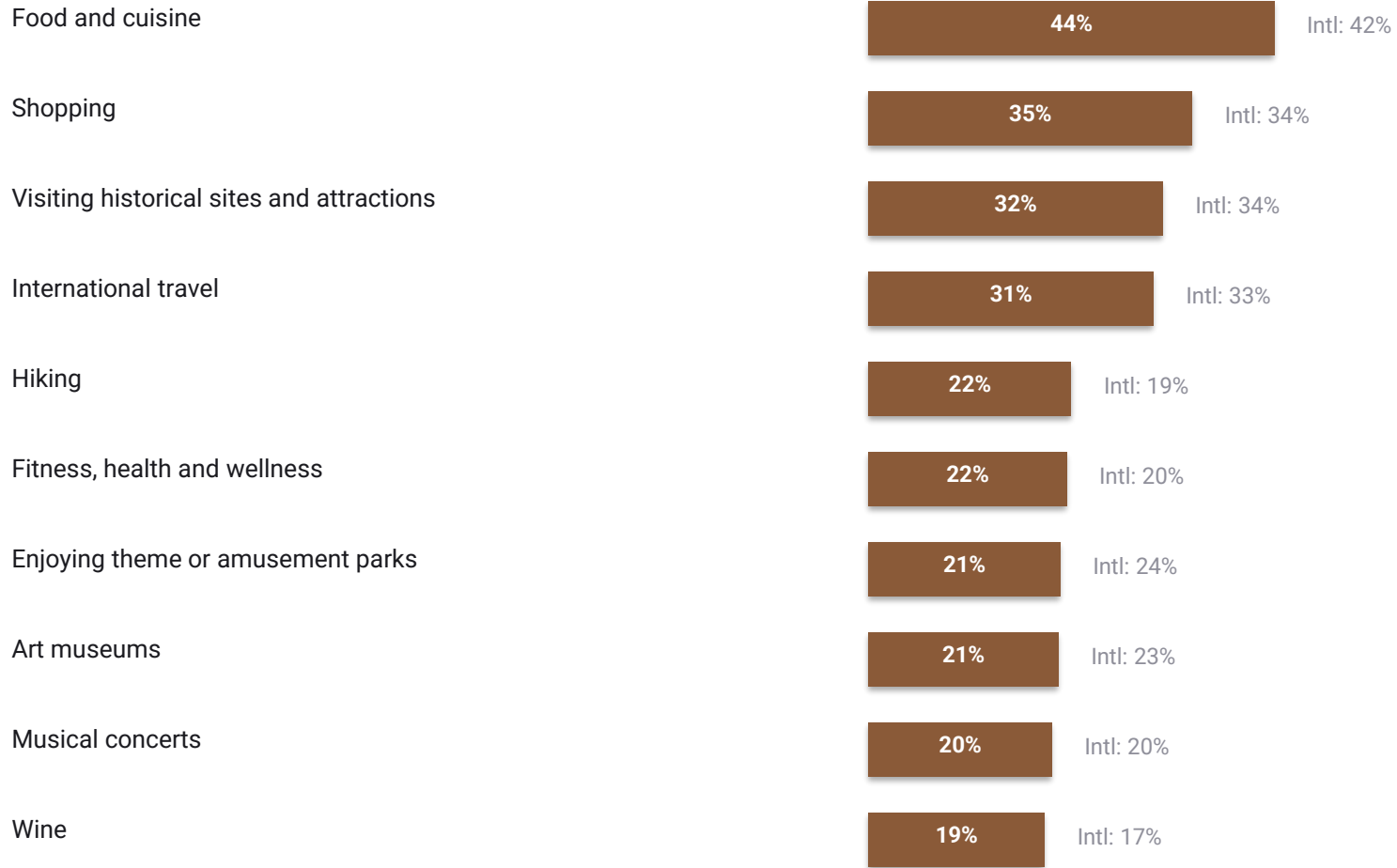
# Travel Motivations

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

# UNITED KINGDOM

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Source Market Analysis | North Carolina

#2 by Spending | #2 by Visits



NORTH CAROLINA

TravelSouth  
All Y'all Are Welcome USA

# United Kingdom | Key Findings

- 1 2026 North Carolina projected spending:** \$140.6M (+3.9% YOY). Projected visitors: 65.7K (+5.3% YOY). Ranks #2 by spending and #2 by visits among North Carolina 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 (6.4%) exceeds 2015-2019 (5.6%).
- 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

**\$140.6M**

2026 North Carolina Spending

**+3.9% YOY** vs. 2025

**65.7K**

2026 North Carolina 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

**\$135.3M**

2025 North Carolina Spending

**+13.1% YOY** vs. 2024

**62.4K**

2025 North Carolina Visitors

**+0.6% 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

**5.6%**

Spending

**3.8%**

Visits

2023-2027 PROJECTED CAGR

**6.4%**

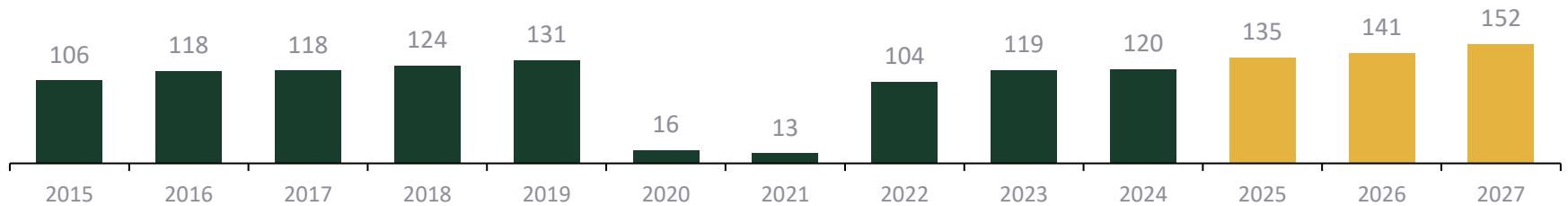
Spending

**2.4%**

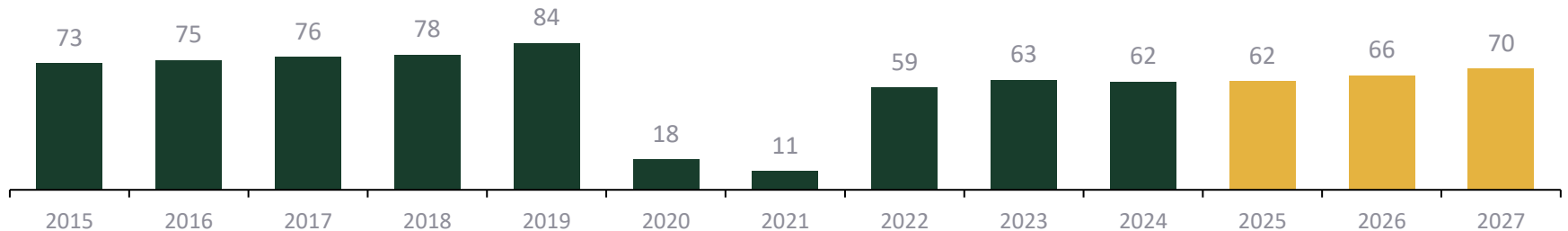
Visits

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%

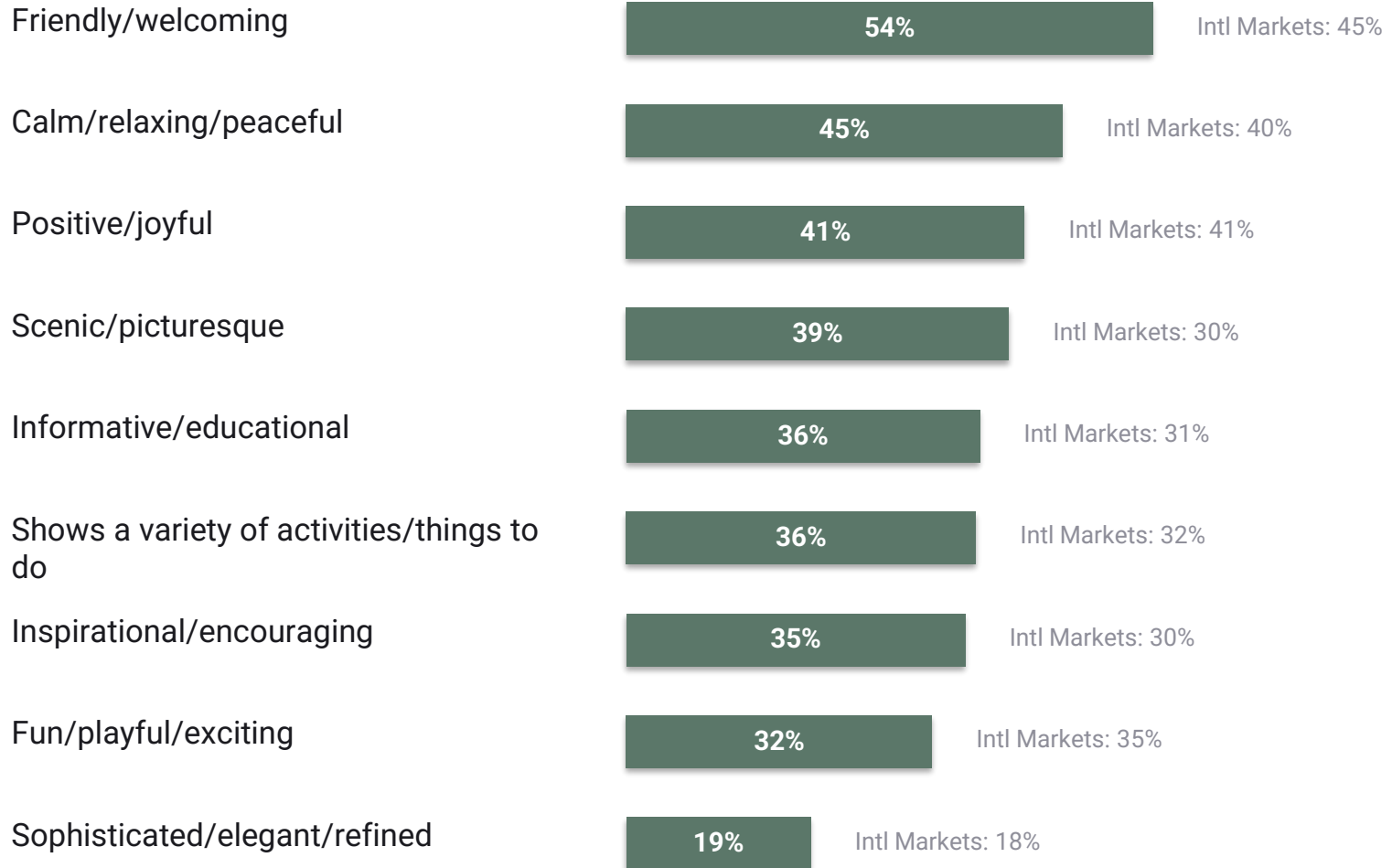
**41%**

**Likely to Visit (5yr)**

Intl Markets: 41%

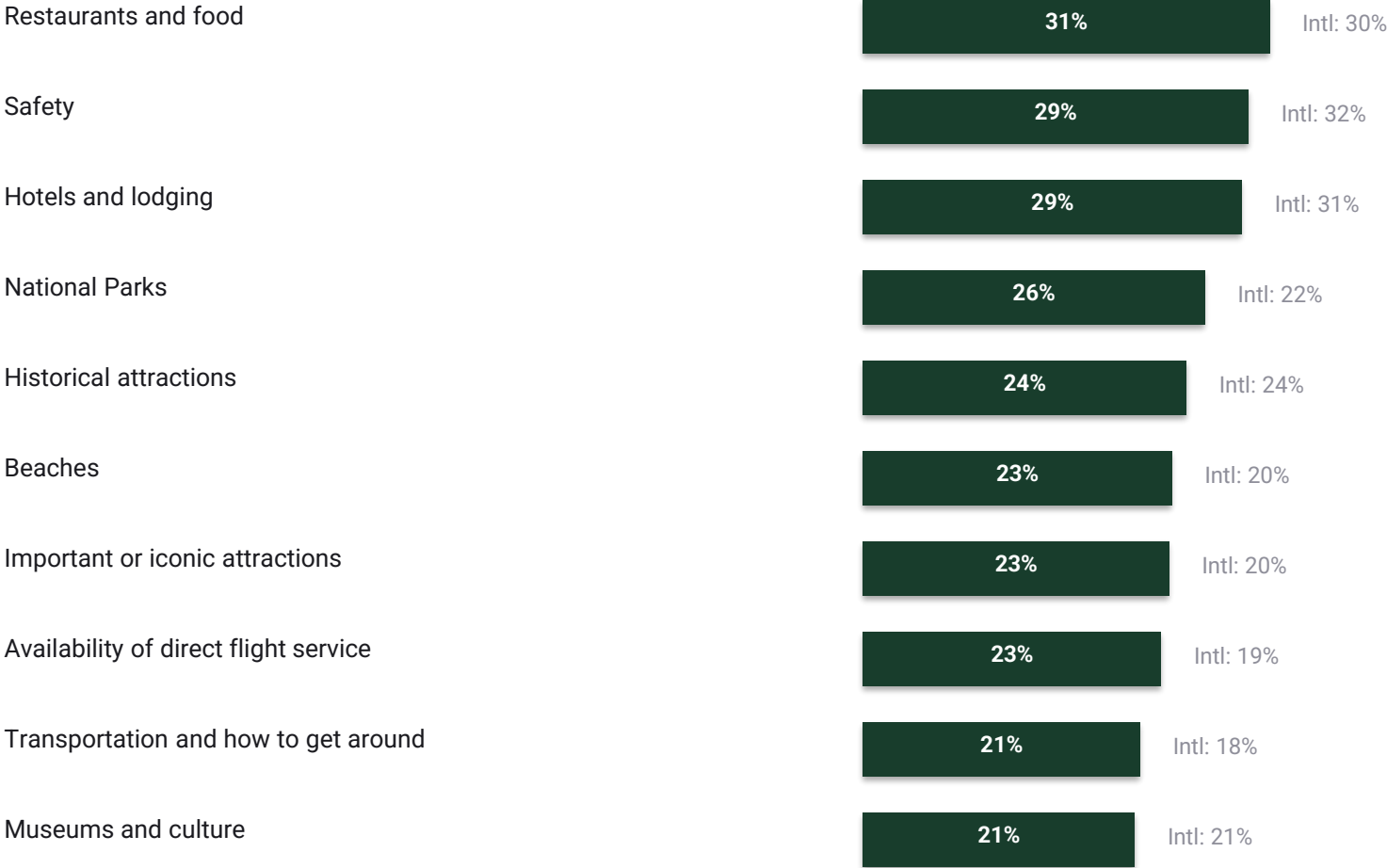
# Desired Travel Promotion Tone

United Kingdom



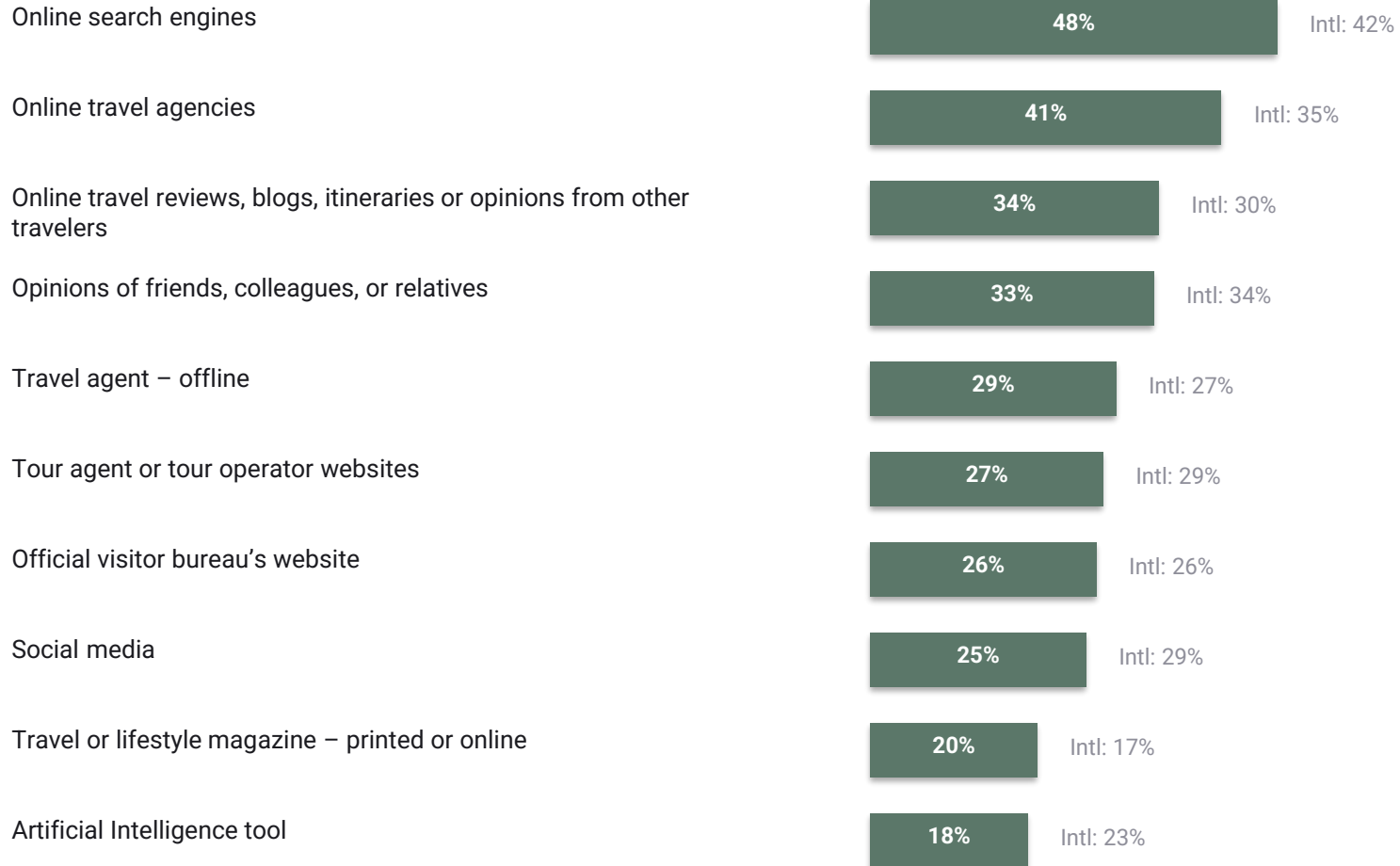
# Top Information Sources

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**

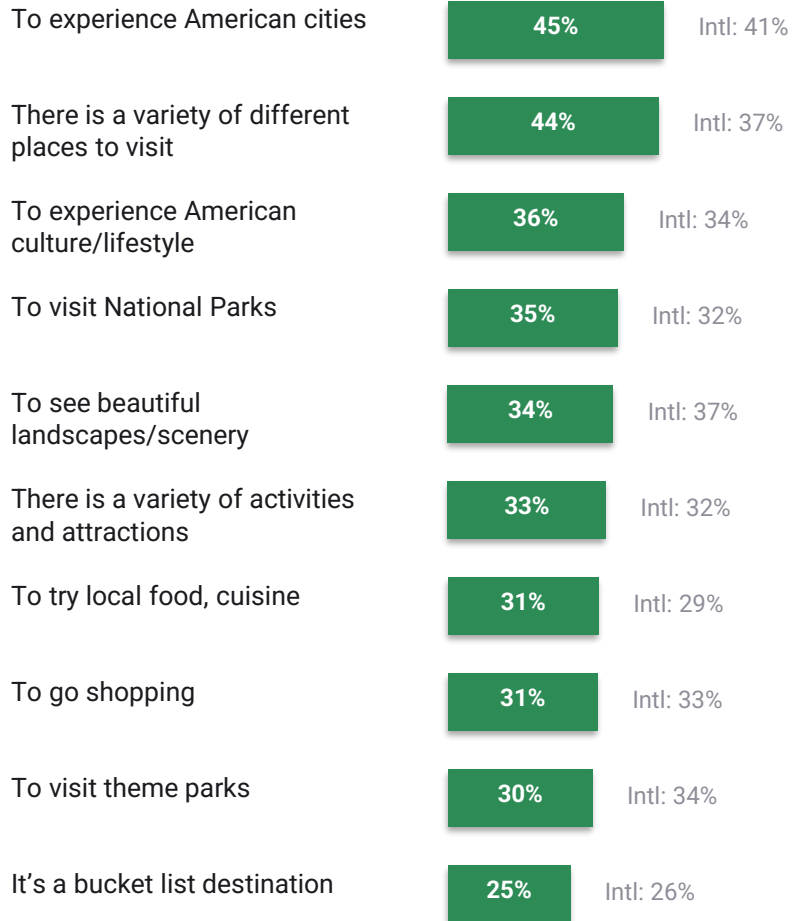
Total

Intl: \$5,049

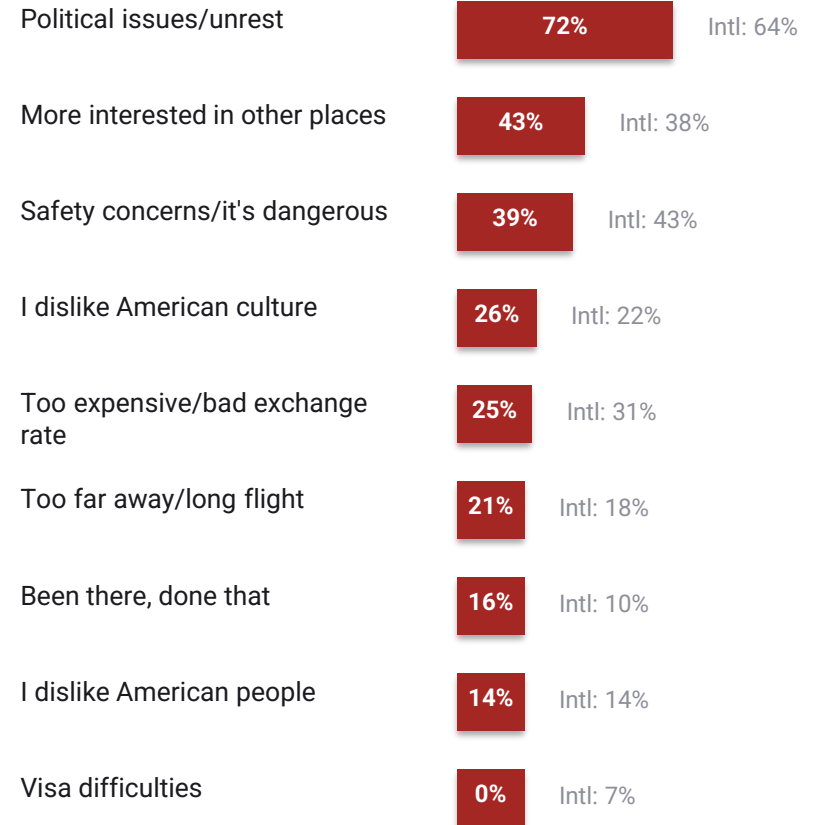
# Enablers & Barriers to Visiting

United Kingdom

## Enablers

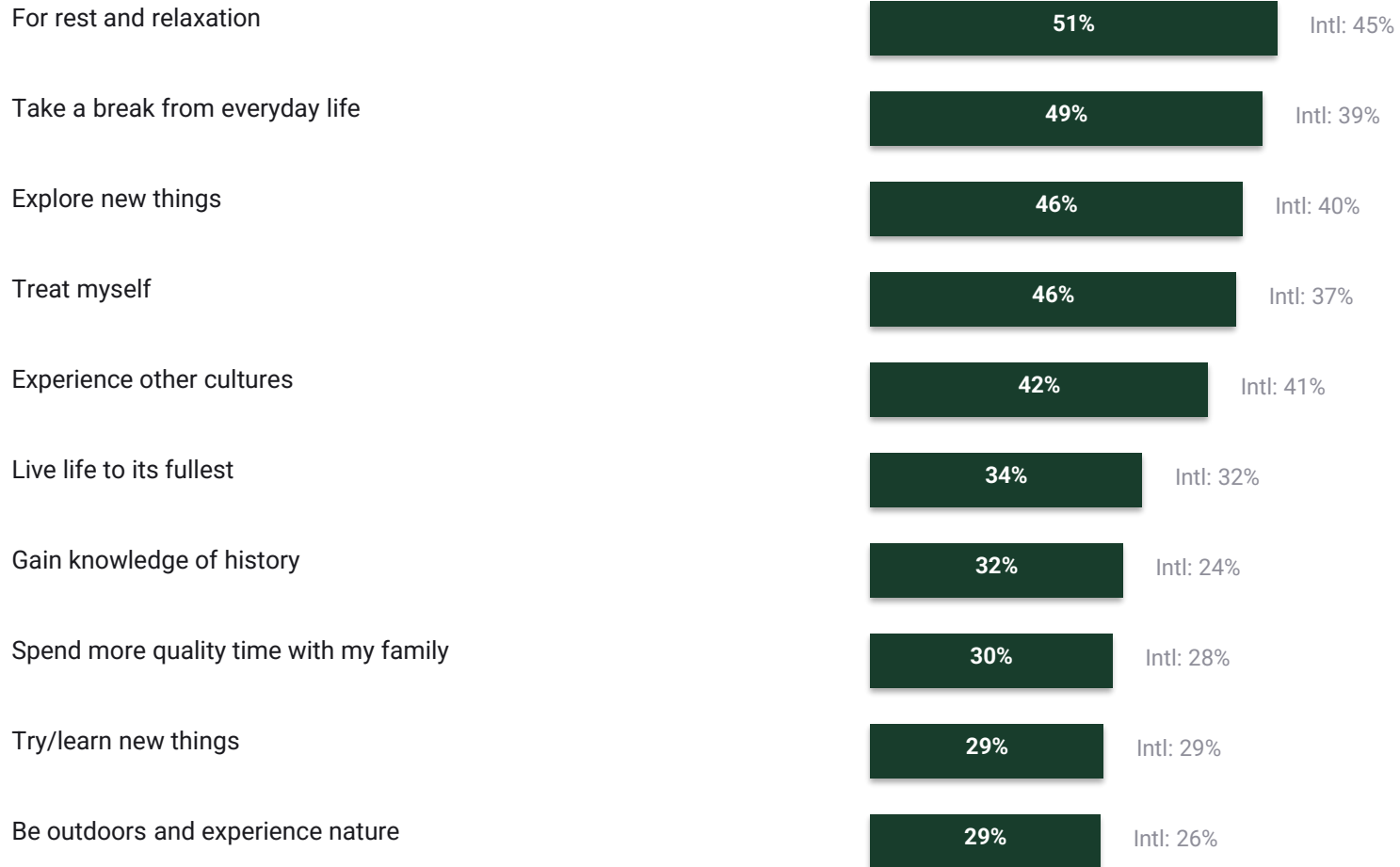


## Barriers



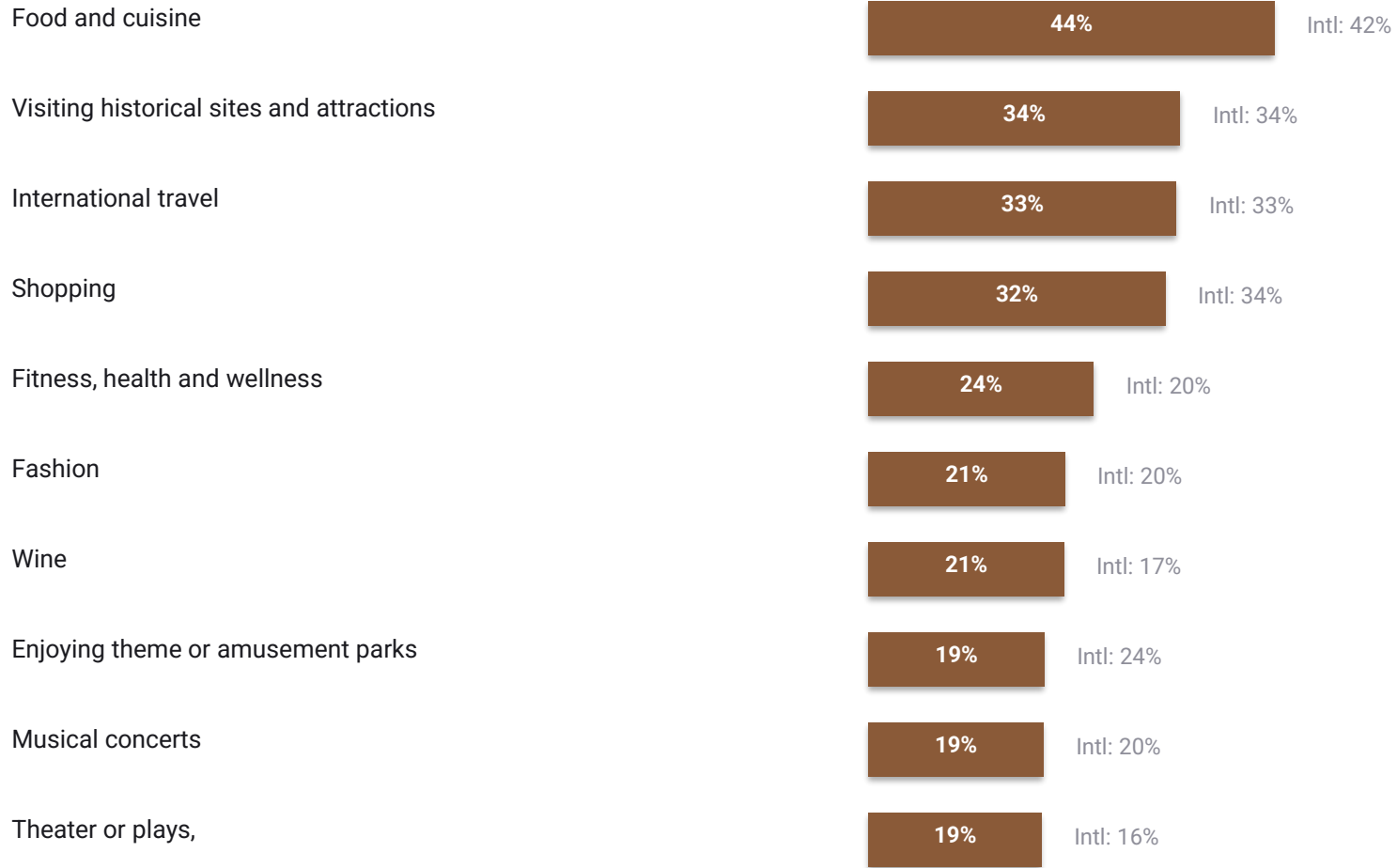
# Travel Motivations

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

# CHINA

---

Source Market Analysis | North Carolina

#3 by Spending | #5 by Visits

A stylized, hand-drawn logo for North Carolina, featuring the letters 'NC' in a bold, black, brush-stroke font.

NORTH CAROLINA

TravelSouth  
All Y'all Are Welcome USA

# China | Key Findings

- 1 2026 North Carolina projected spending:** \$110.3M (+5.1% YOY). Projected visitors: 33.8K (+4.6% YOY). Ranks #3 by spending and #5 by visits among North Carolina 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 (26.7%) 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

**\$110.3M**

2026 North Carolina Spending

**+5.1% YOY** vs. 2025

**33.8K**

2026 North Carolina Visitors

**+4.6% YOY** vs. 2025

**\$8.8B**

2026 USA Spending

**+4.8% YOY** vs. 2025

**2.8M**

2026 USA Visitors

**+4.8% YOY** vs. 2025

**\$104.9M**

2025 North Carolina Spending

**+4.4% YOY** vs. 2024

**32.3K**

2025 North Carolina Visitors

**-4.2% 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

**2.8%**

Visits

2023-2027 PROJECTED CAGR

**26.7%**

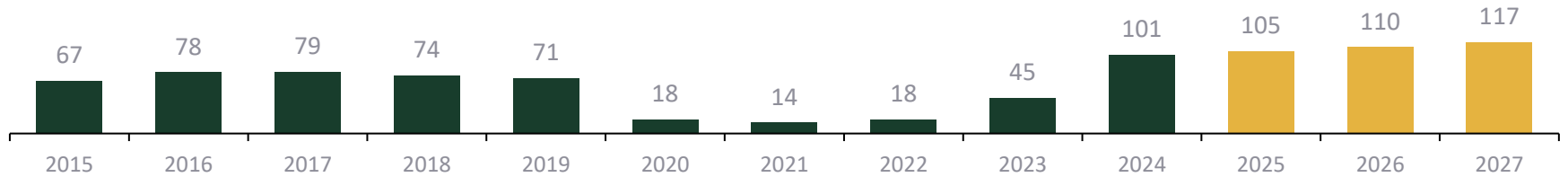
Spending

**14.8%**

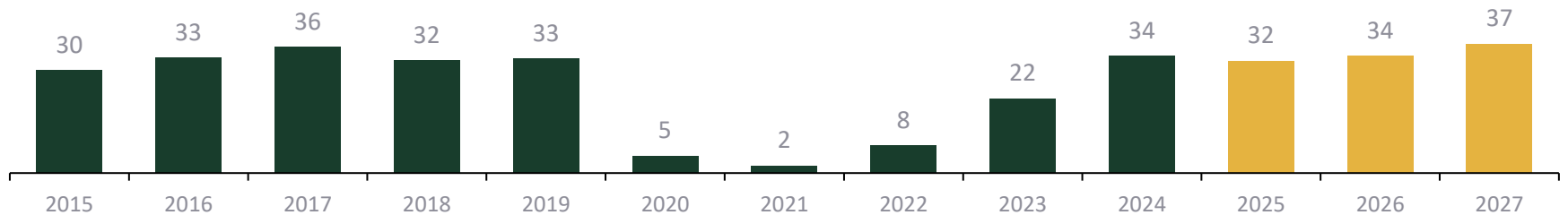
Visits

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%

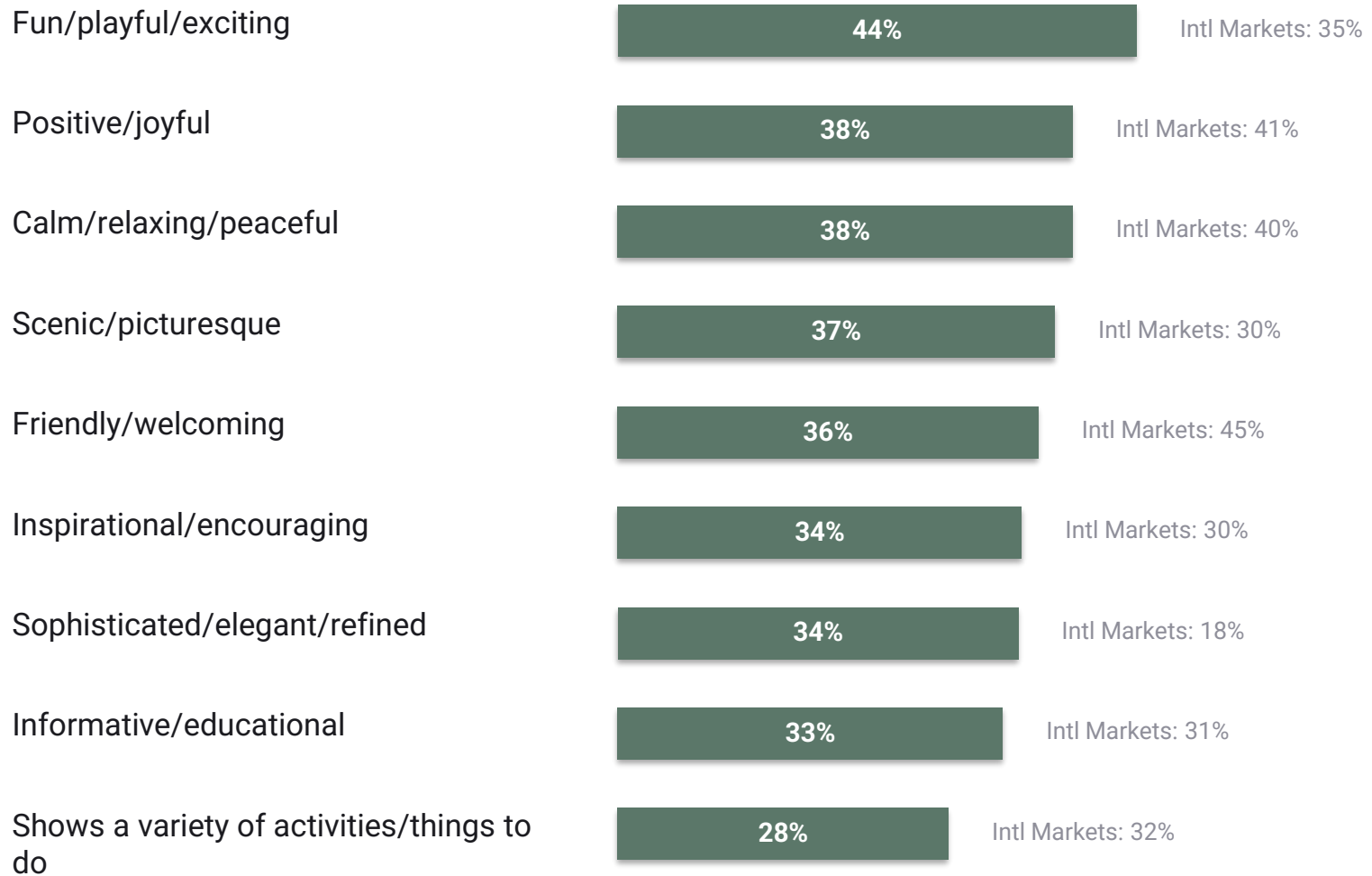
**54%**

**Likely to Visit (5yr)**

Intl Markets: 41%

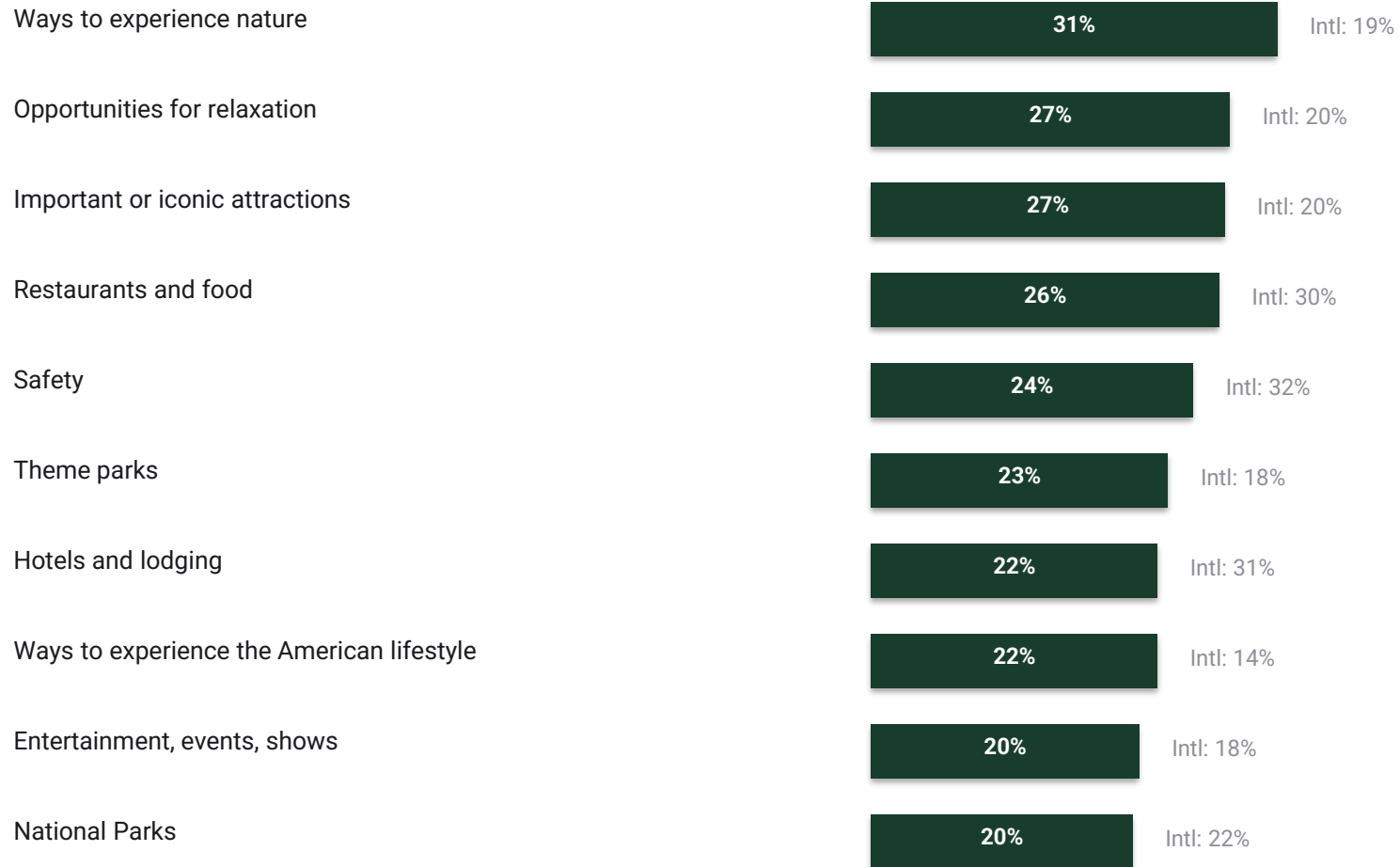
# Desired Travel Promotion Tone

China



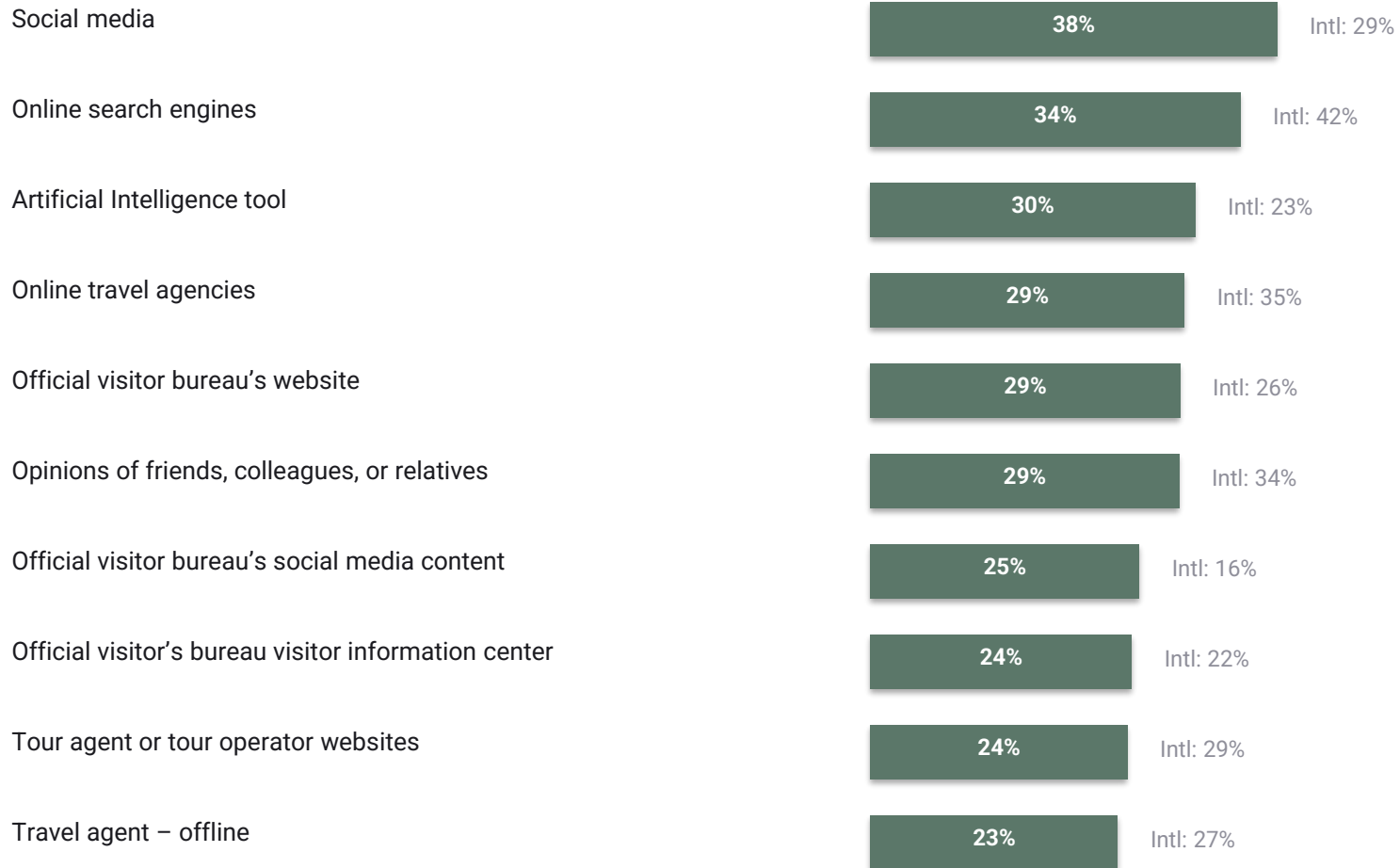
# Top Information Sources

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**

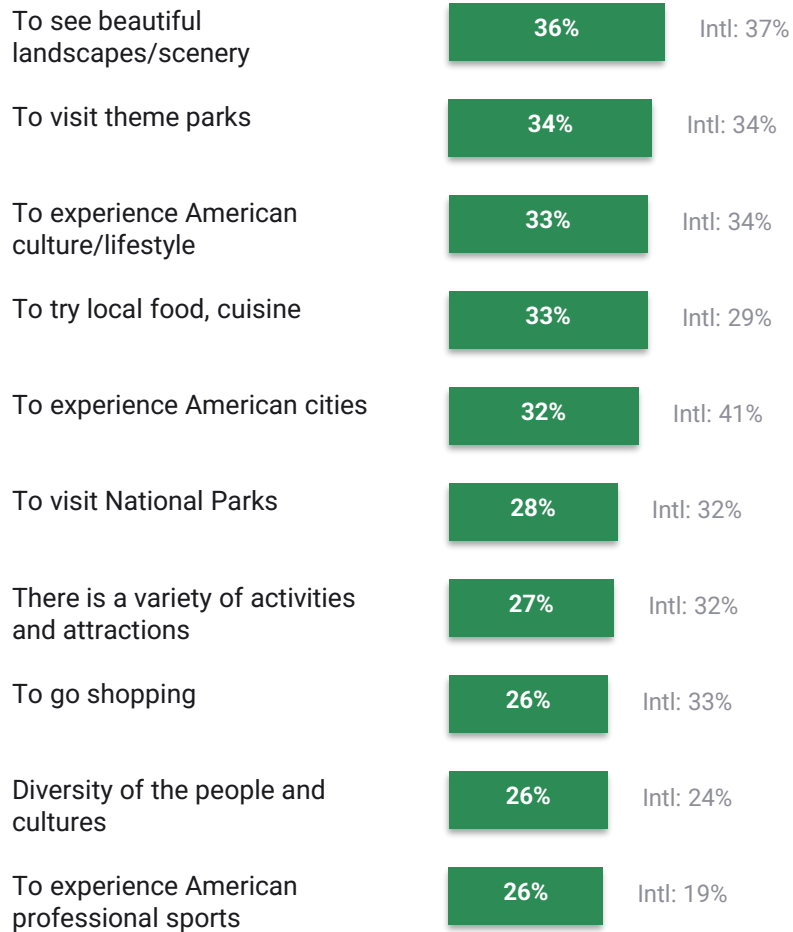
Total

Intl: \$5,049

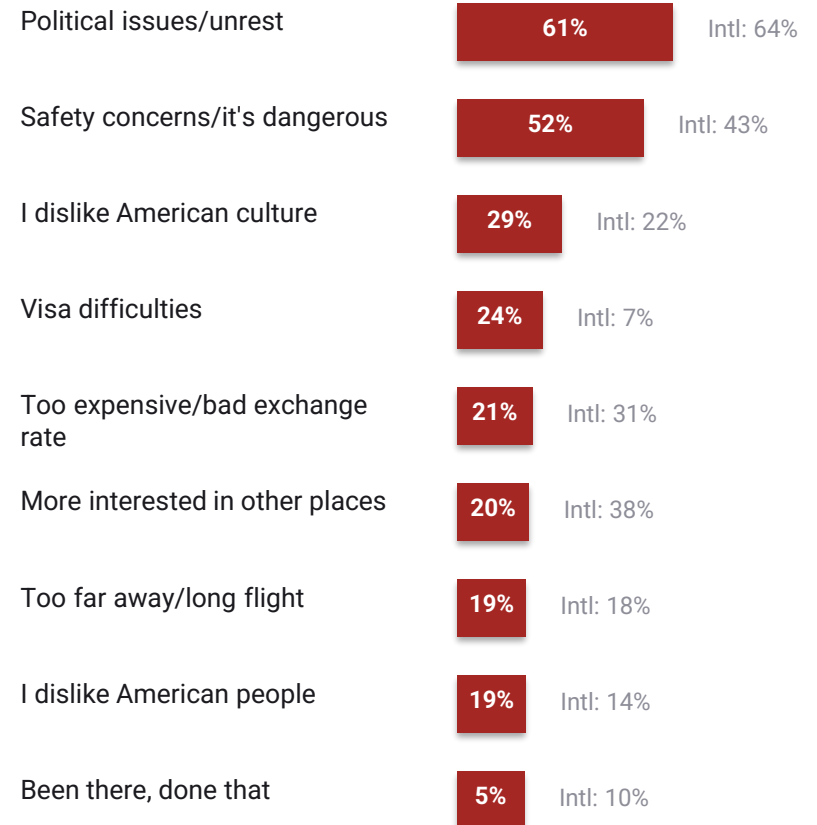
# Enablers & Barriers to Visiting

China

## Enablers

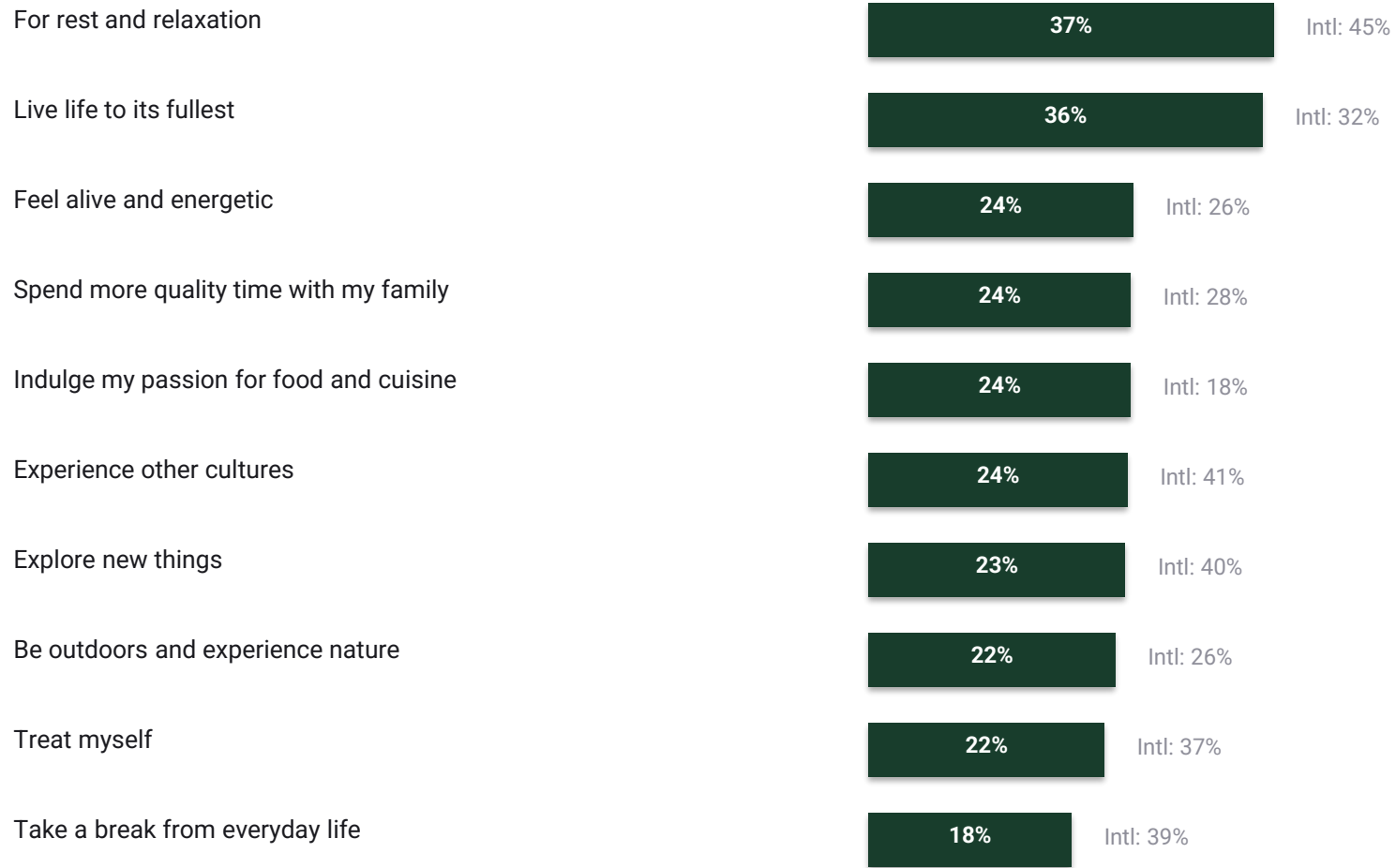


## Barriers



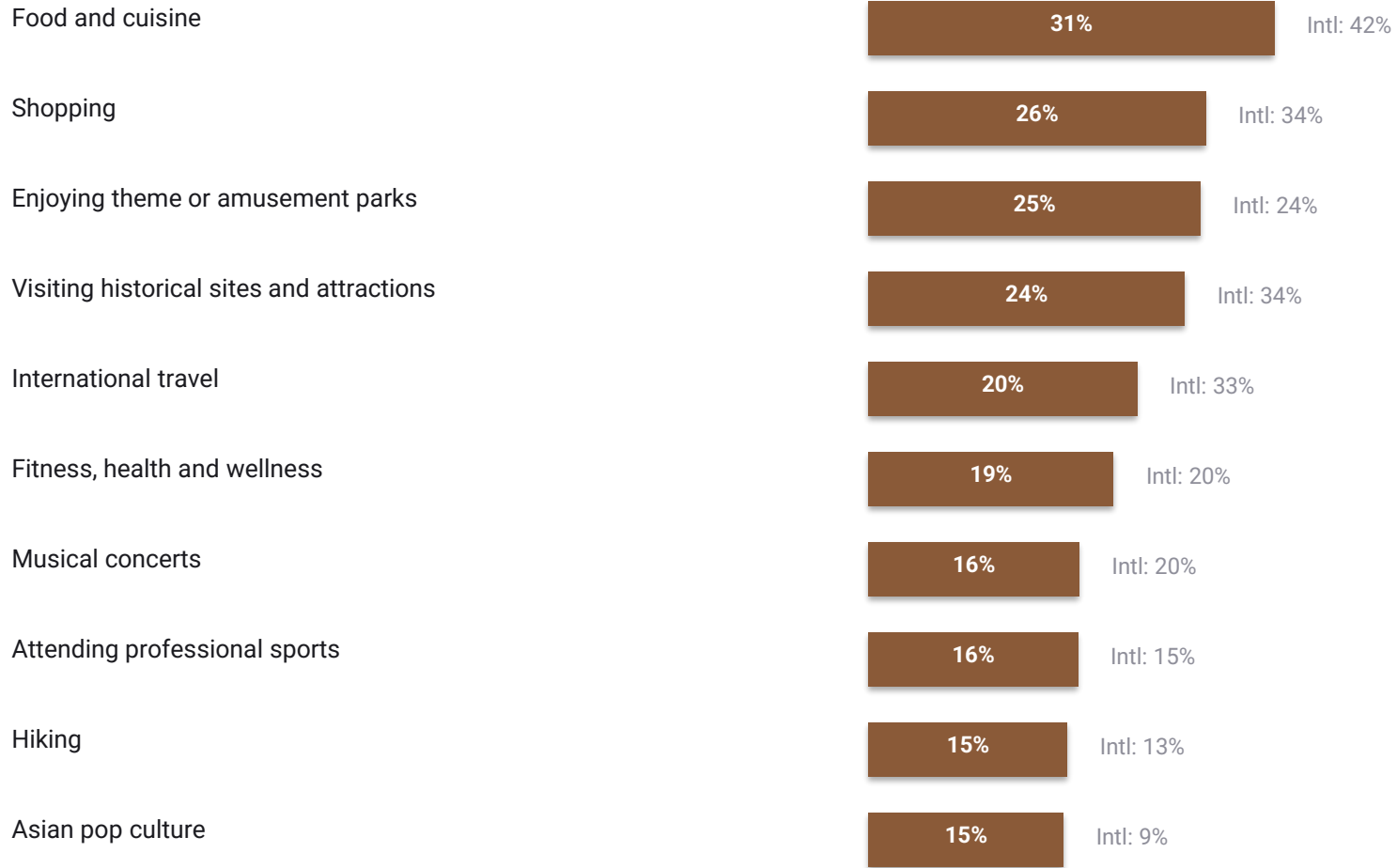
# Travel Motivations

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.

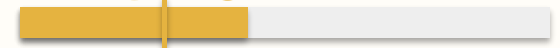
47%



Intl: 34%

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

43%



Intl: 27%

China

Intl Markets

# INDIA

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Source Market Analysis | North Carolina

#4 by Spending | #3 by Visits

A stylized, hand-drawn logo for North Carolina, featuring the letters 'NC' in a bold, black, brush-stroke font.

NORTH CAROLINA

TravelSouth  
All Y'all Are Welcome USA

# India | Key Findings

- 1 2026 North Carolina projected spending:** \$83.6M (+5.8% YOY). Projected visitors: 52.2K (+1.2% YOY). Ranks #4 by spending and #3 by visits among North Carolina 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%) exceeds 2015-2019 (4.1%).
- 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%)

# India

**\$83.6M**

2026 North Carolina Spending

**+5.8% YOY** vs. 2025

**52.2K**

2026 North Carolina Visitors

**+1.2% YOY** vs. 2025

**\$7.1B**

2026 USA Spending

**+5.7% YOY** vs. 2025

**3.3M**

2026 USA Visitors

**+2.3% YOY** vs. 2025

**\$79M**

2025 North Carolina Spending

**-5.6% YOY** vs. 2024

**51.6K**

2025 North Carolina Visitors

**-5.7% 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

**4.1%**

Spending

**4.7%**

Visits

2023-2027 PROJECTED CAGR

**10%**

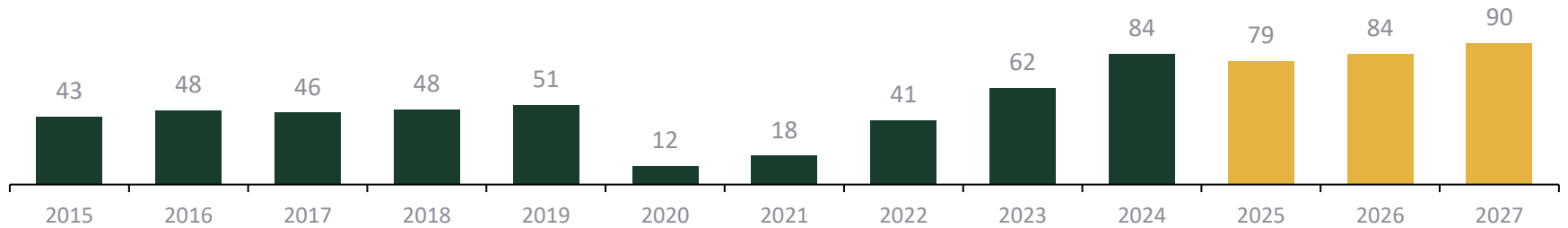
Spending

**6.4%**

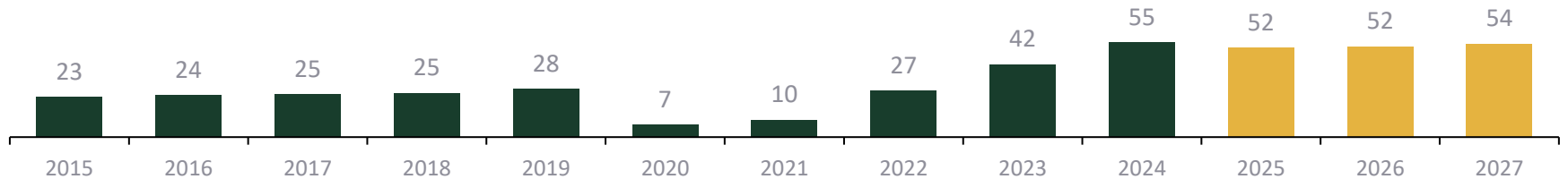
Visits

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%

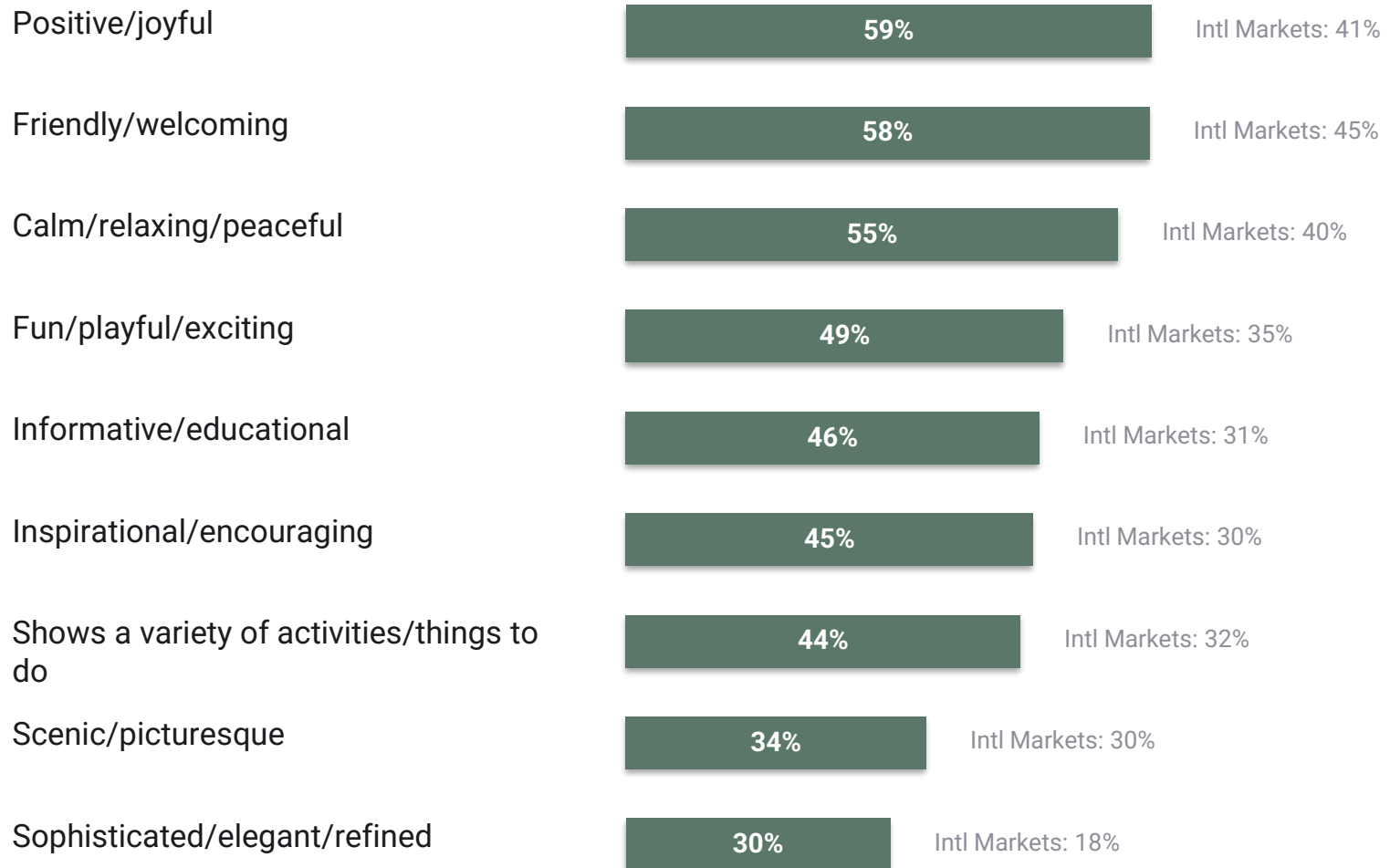
**74%**

**Likely to Visit (5yr)**

Intl Markets: 41%

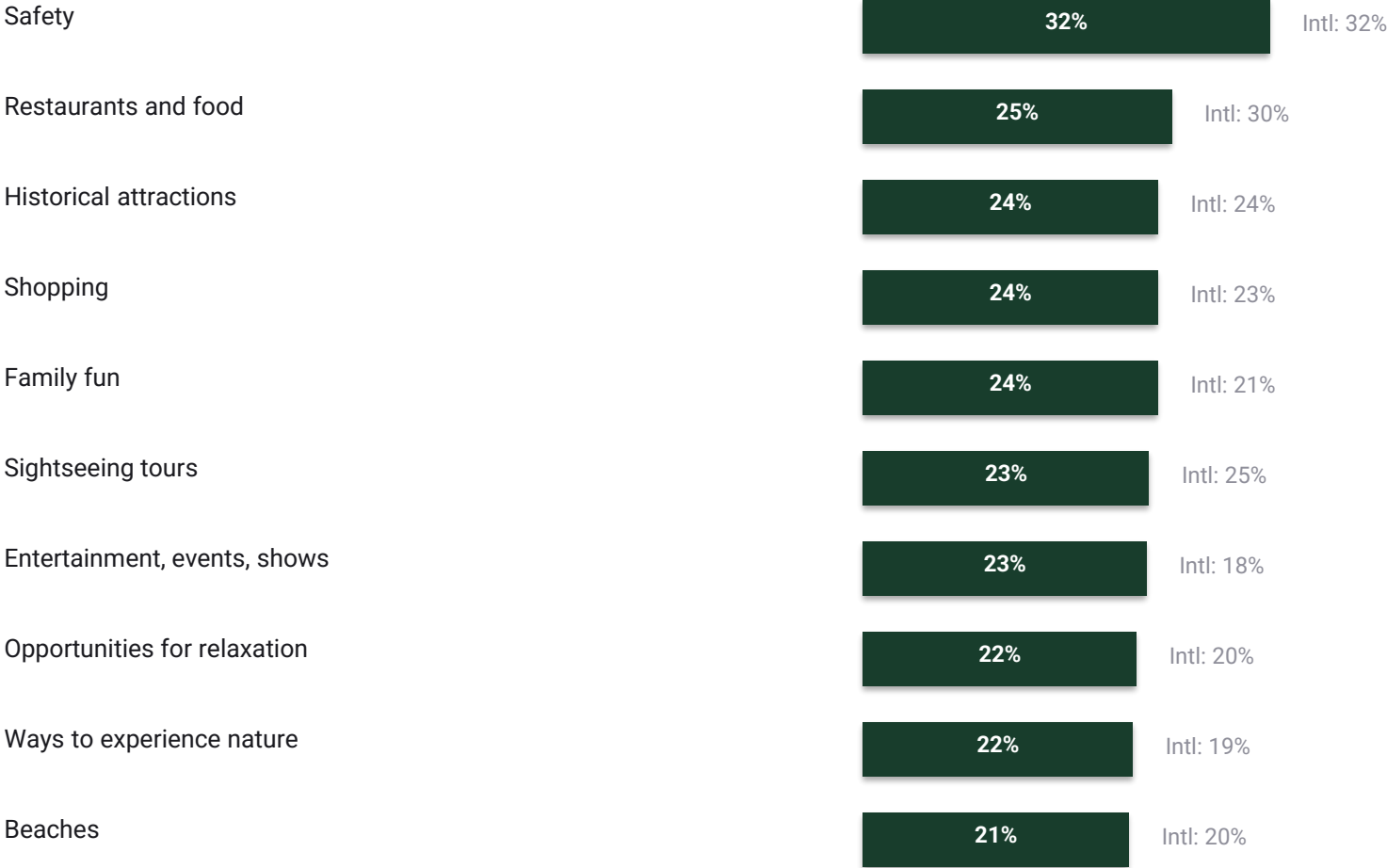
# Desired Travel Promotion Tone

India



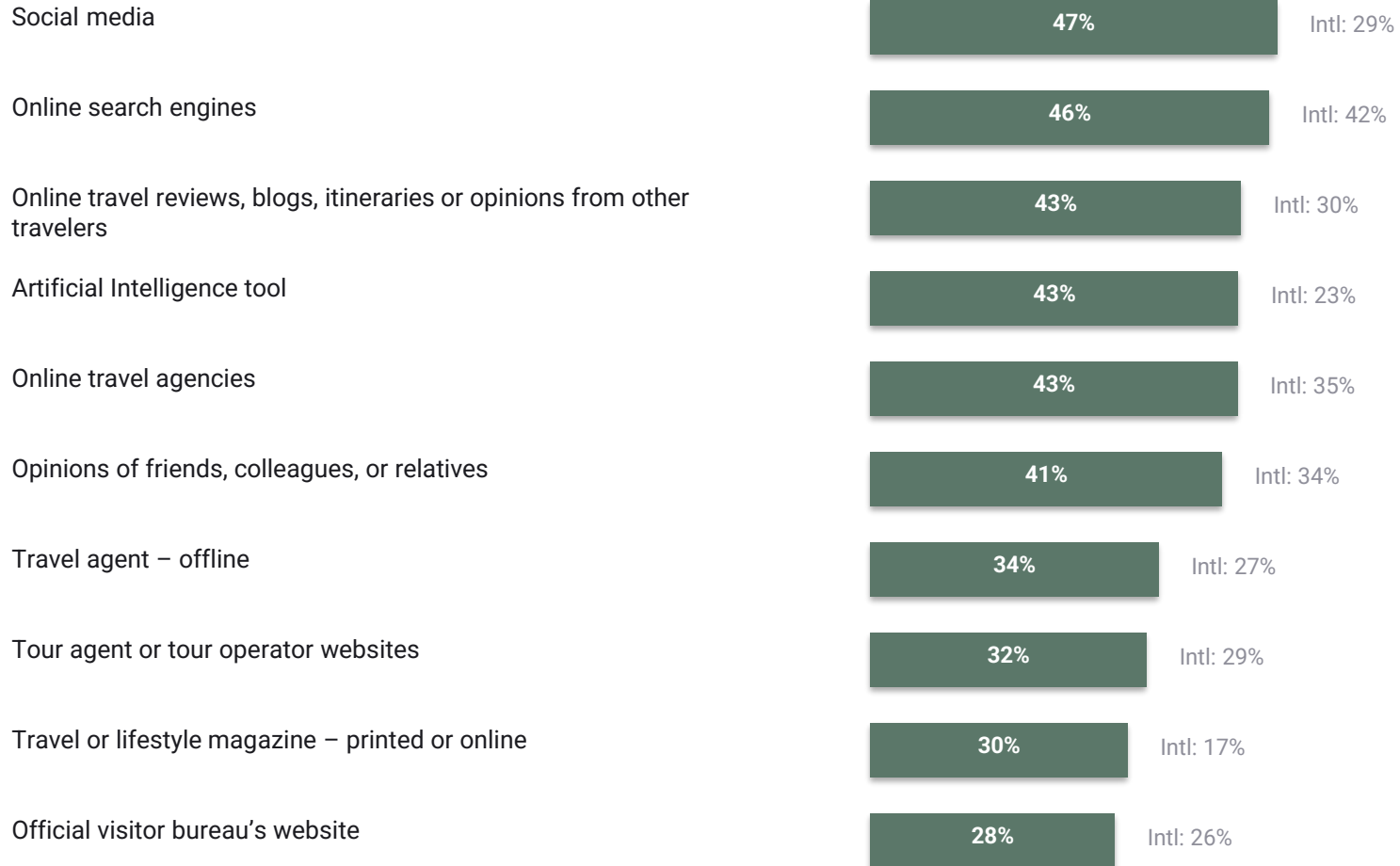
# Top Information Sources

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**

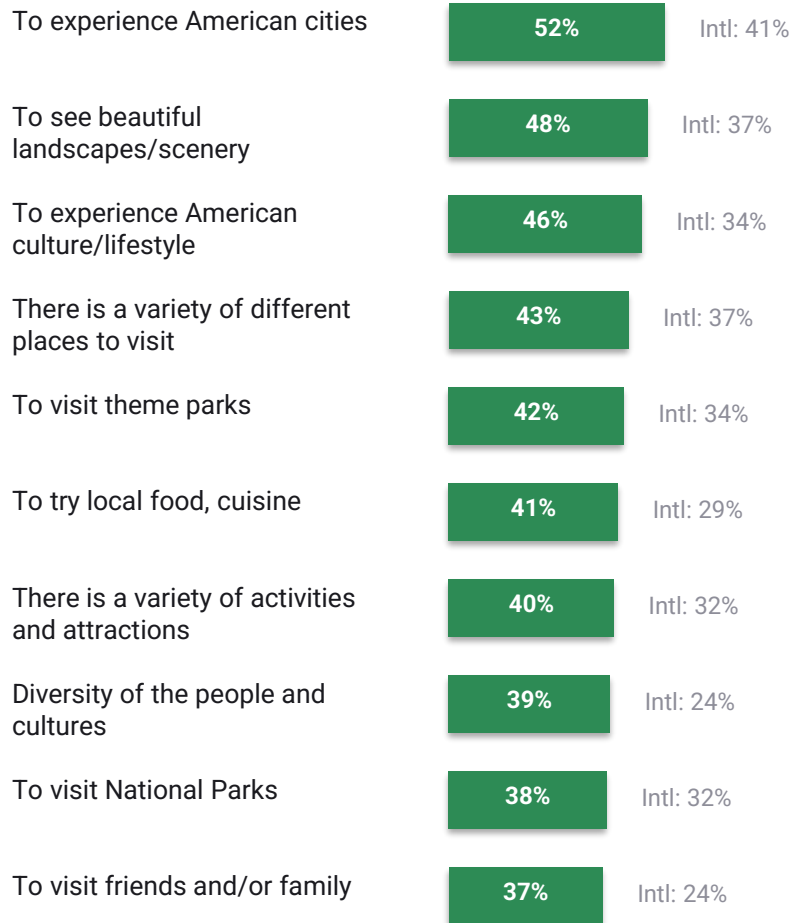
Total

Intl: \$5,049

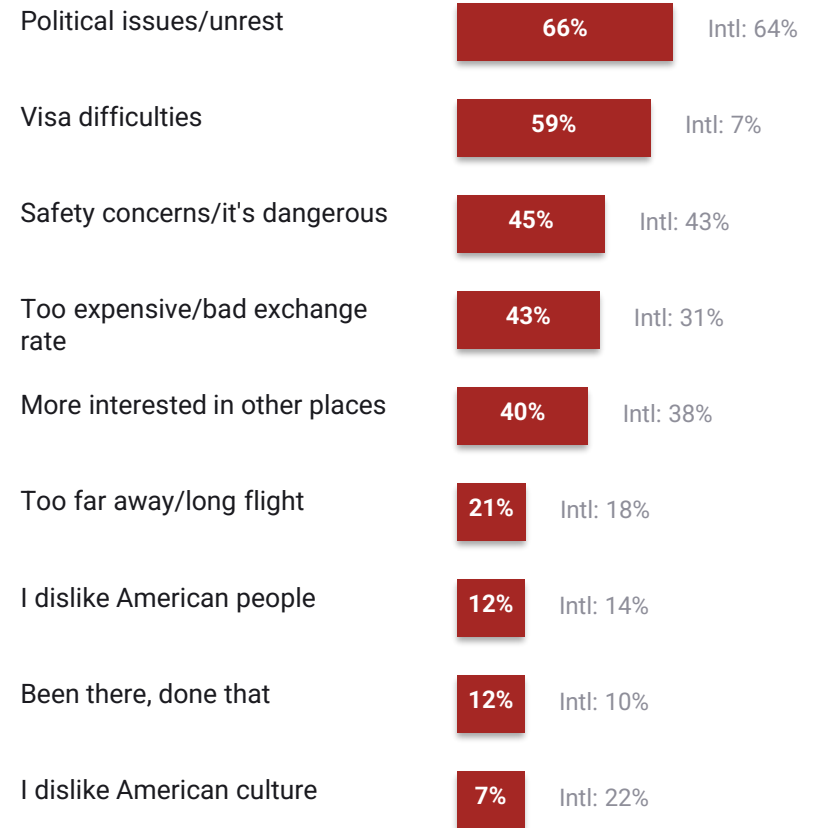
# Enablers & Barriers to Visiting

India

## Enablers

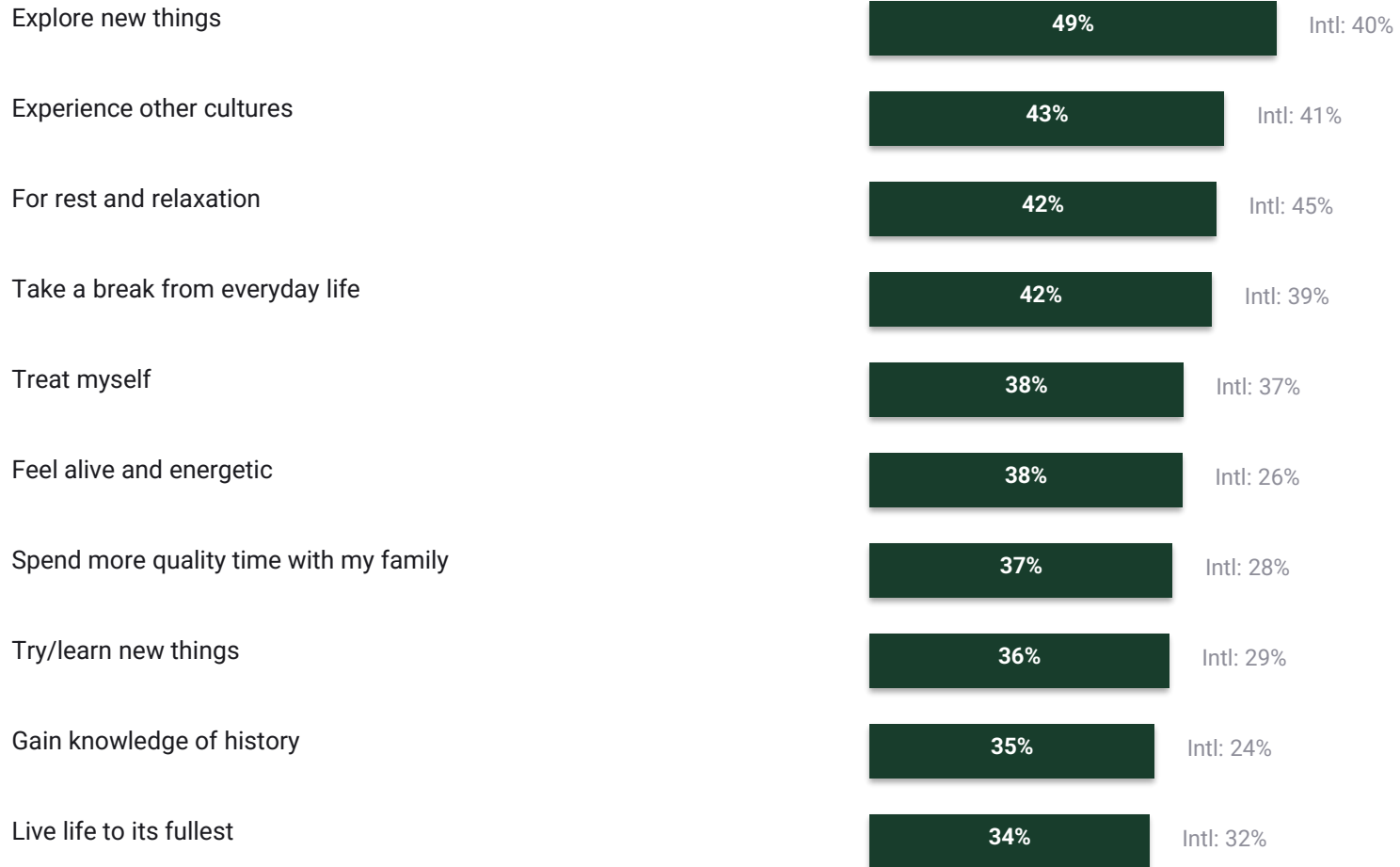


## Barriers



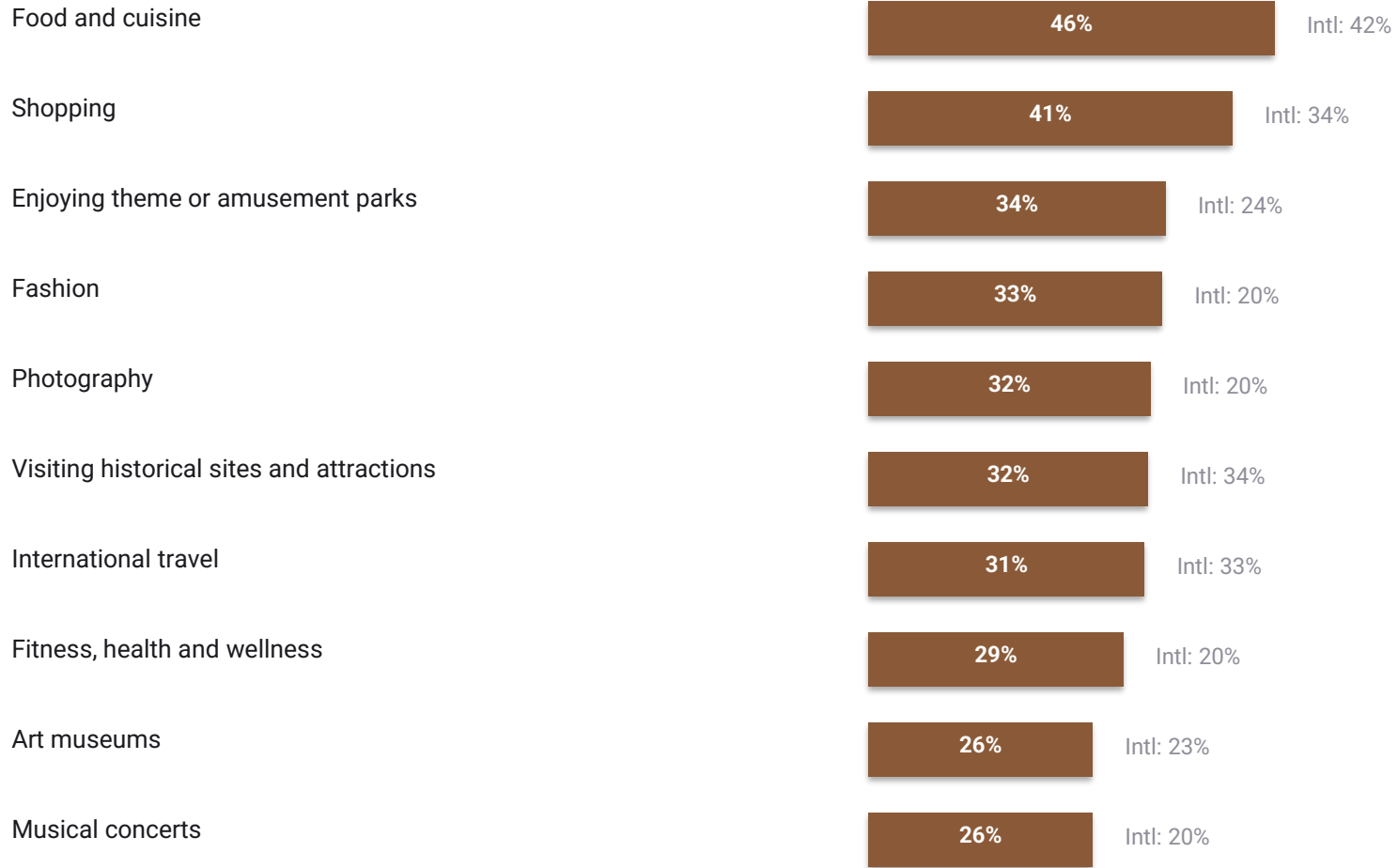
# Travel Motivations

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

# GERMANY

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Source Market Analysis | North Carolina

#5 by Spending | #4 by Visits

A stylized, hand-drawn logo for North Carolina, featuring the letters 'NC' in a bold, black, brush-stroke font.

NORTH CAROLINA

TravelSouth  
All Y'all Are Welcome USA

# Germany | Key Findings

- 1 2026 North Carolina projected spending:** \$74.7M (+7.3% YOY). Projected visitors: 40.5K (+3.1% YOY). Ranks #5 by spending and #4 by visits among North Carolina 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 (9.6%) exceeds 2015-2019 (3.7%).
- 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

**\$74.7M**

2026 North Carolina Spending

**+7.3% YOY** vs. 2025

**40.5K**

2026 North Carolina 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

**\$69.6M**

2025 North Carolina Spending

**+6.9% YOY** vs. 2024

**39.3K**

2025 North Carolina Visitors

**-10.7% 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

**3.7%**

Spending

**2.6%**

Visits

2023-2027 PROJECTED CAGR

**9.6%**

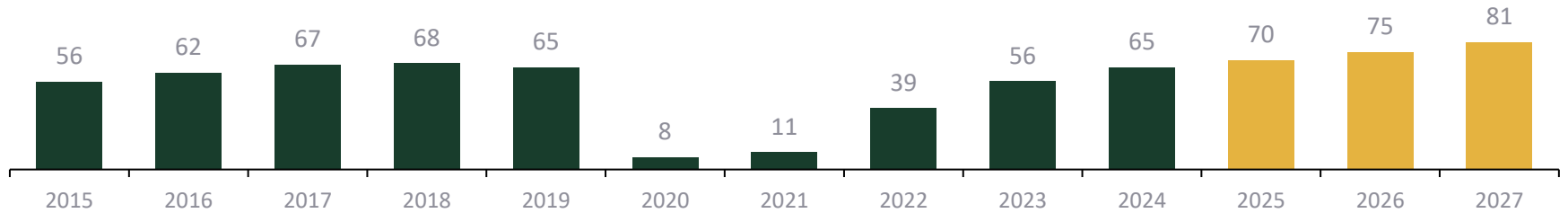
Spending

**2.6%**

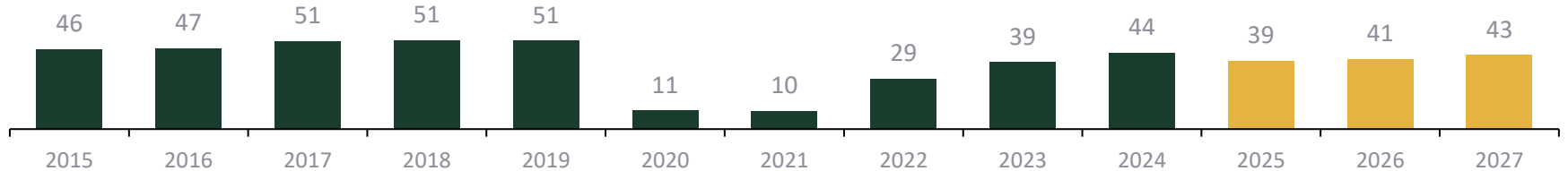
Visits

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%

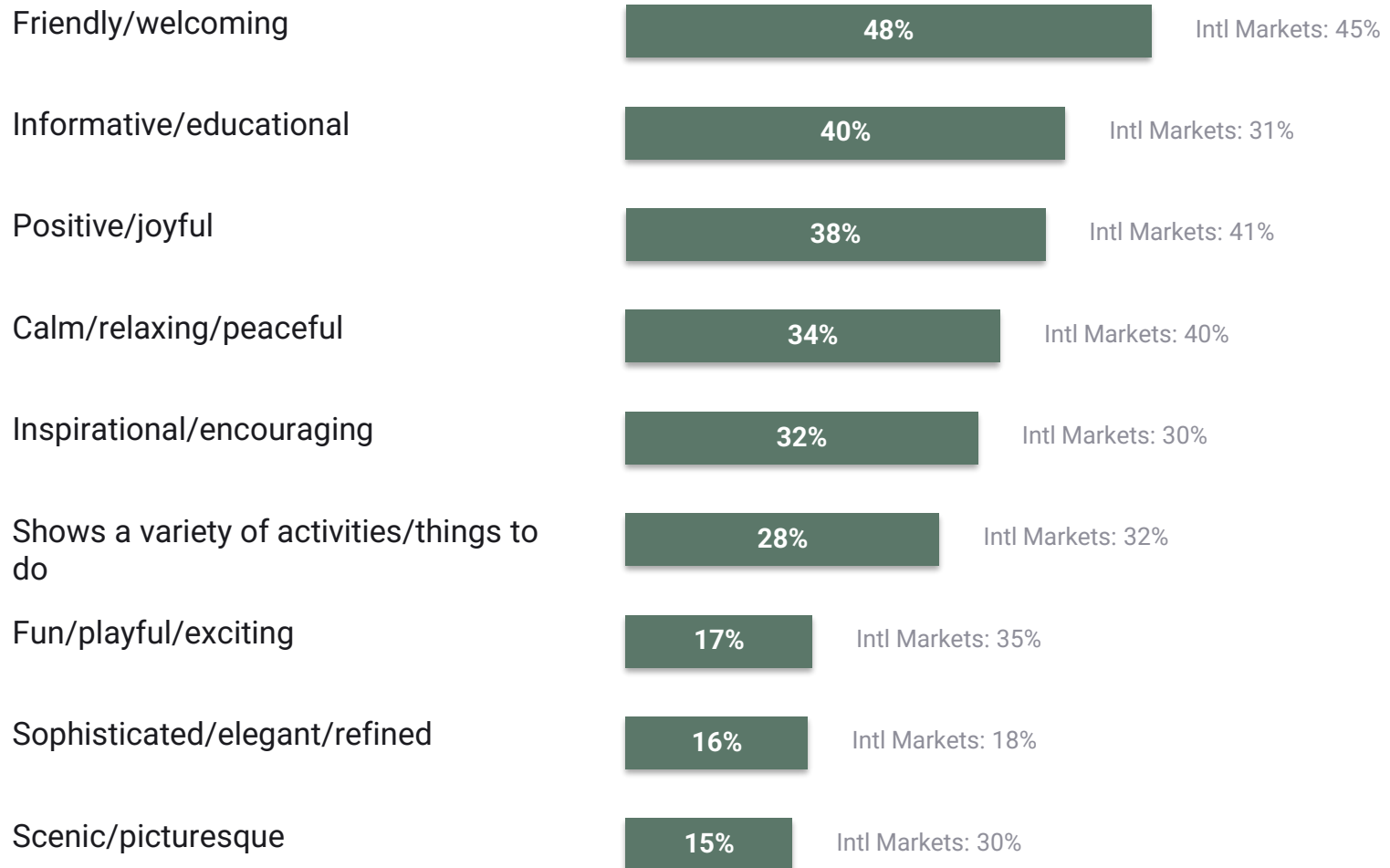
**36%**

**Likely to Visit (5yr)**

Intl Markets: 41%

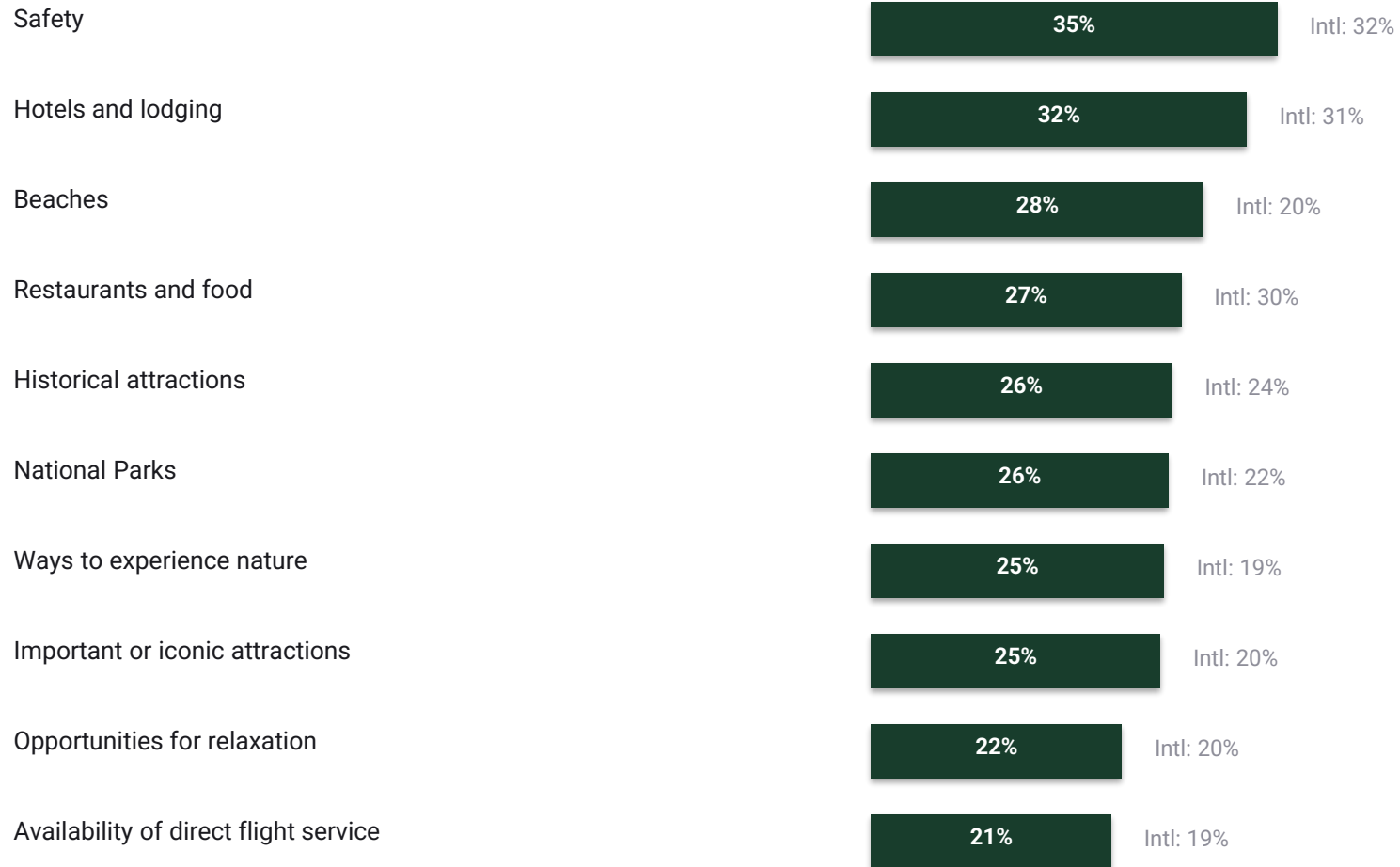
# Desired Travel Promotion Tone

Germany



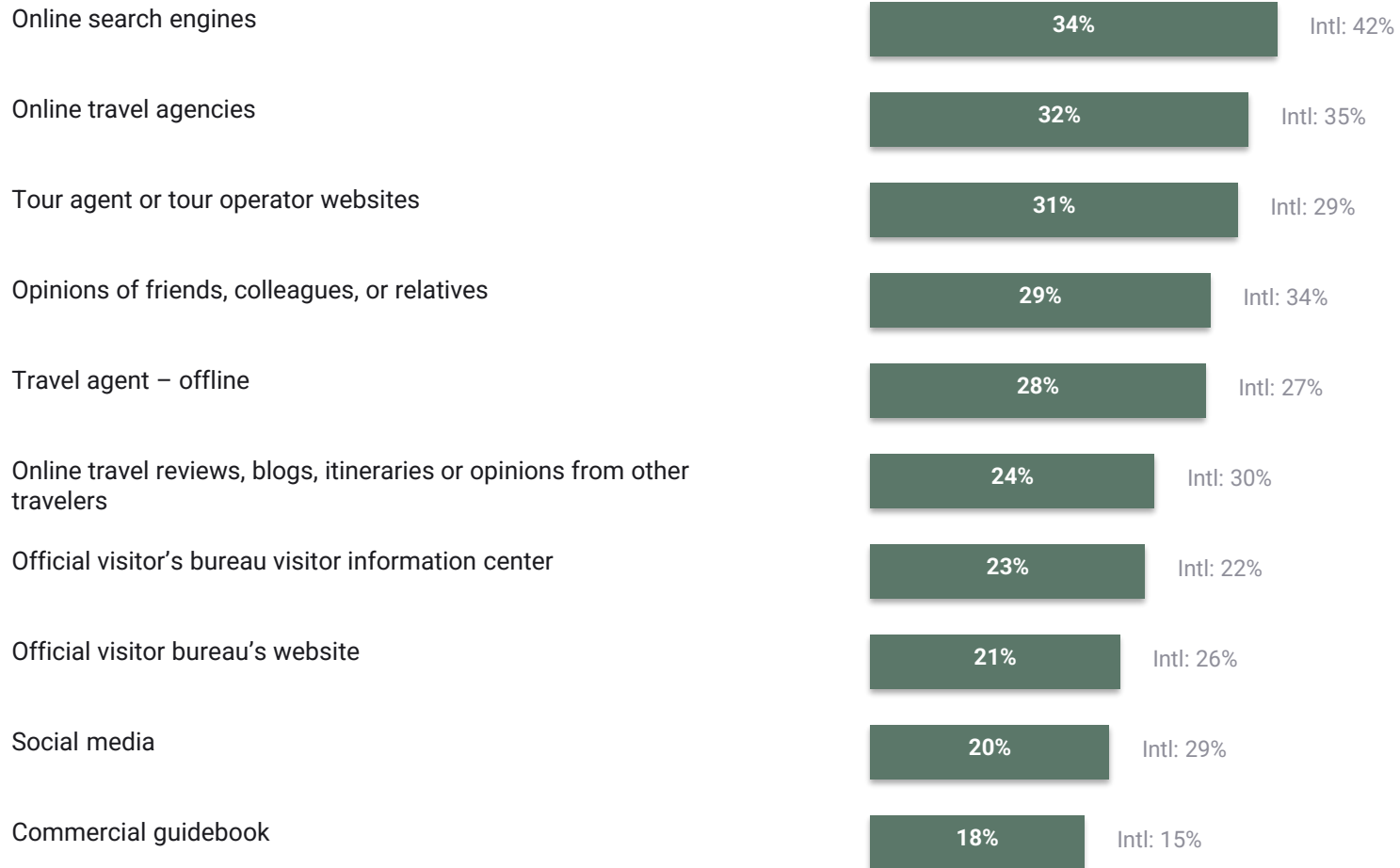
# Top Information Sources

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**

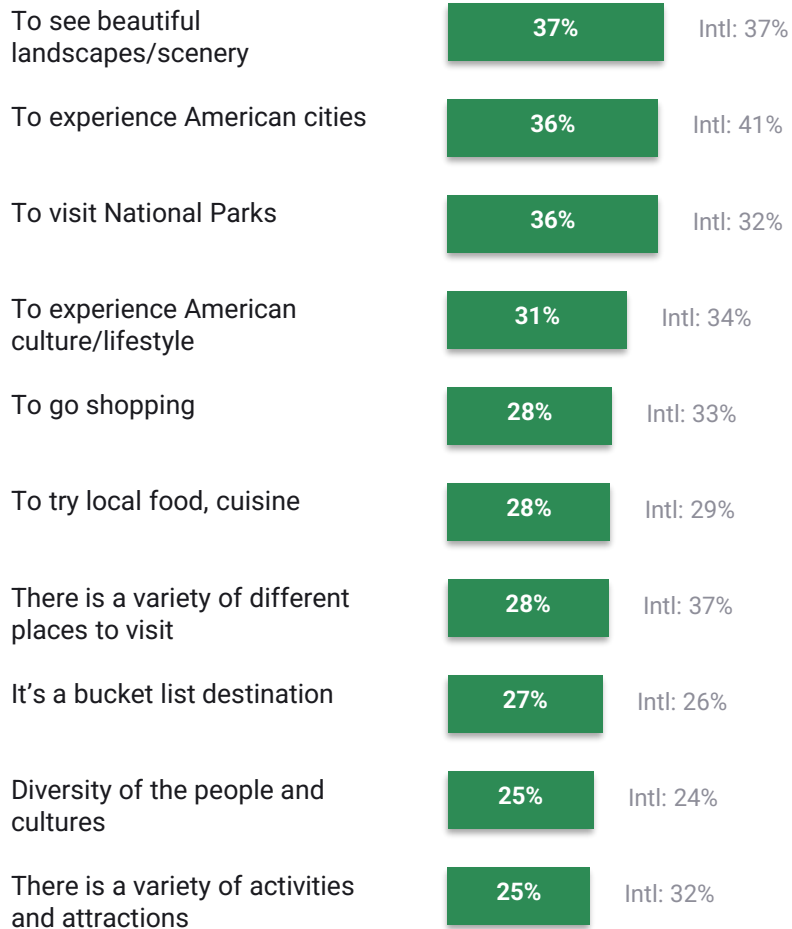
Total

Intl: \$5,049

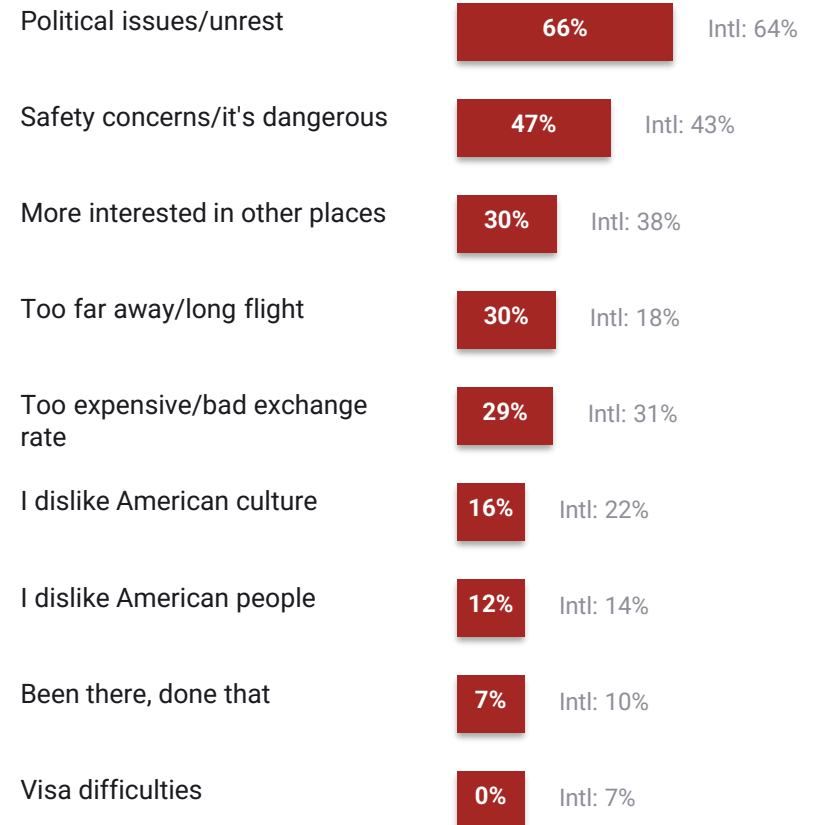
# Enablers & Barriers to Visiting

Germany

## Enablers

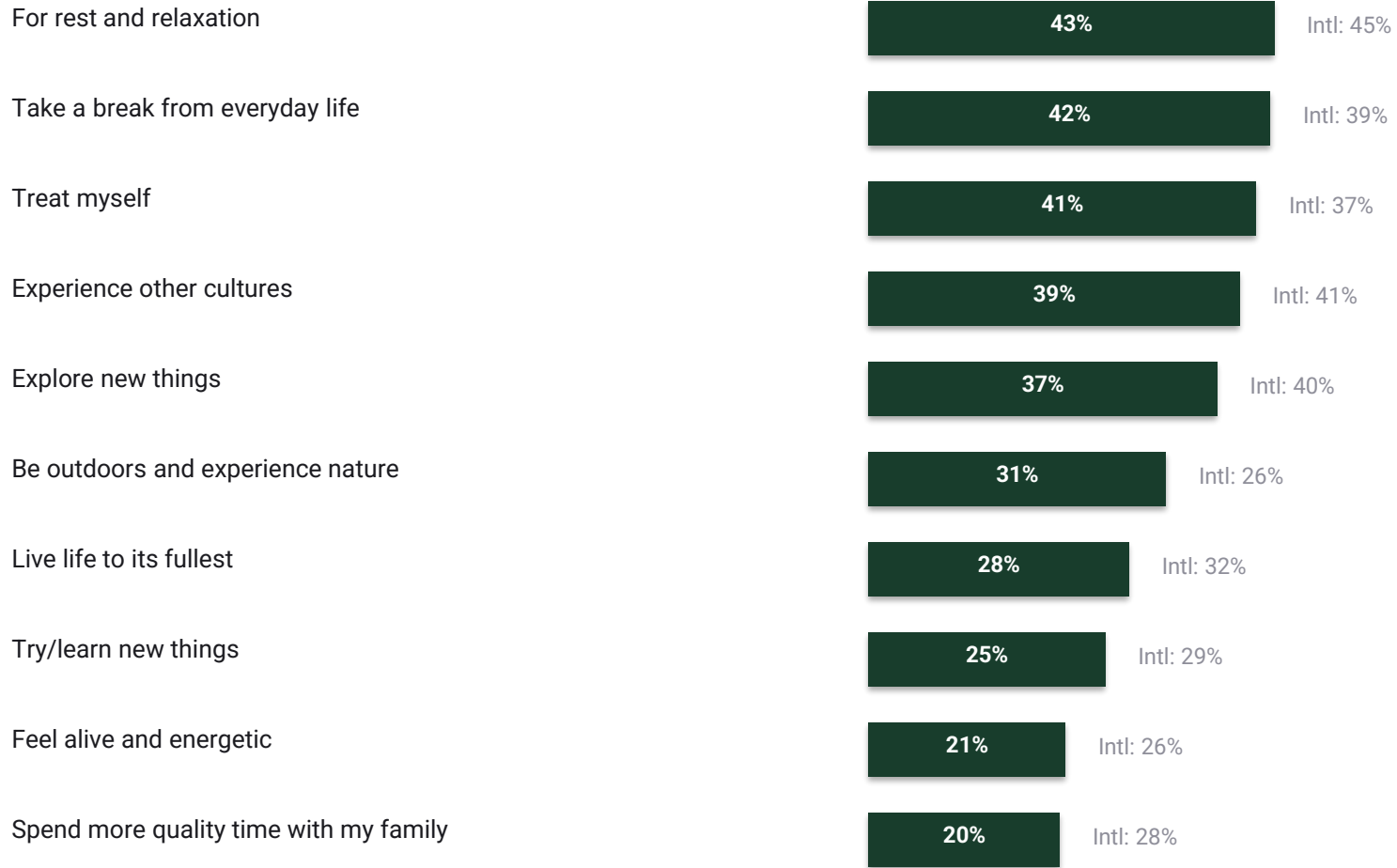


## Barriers



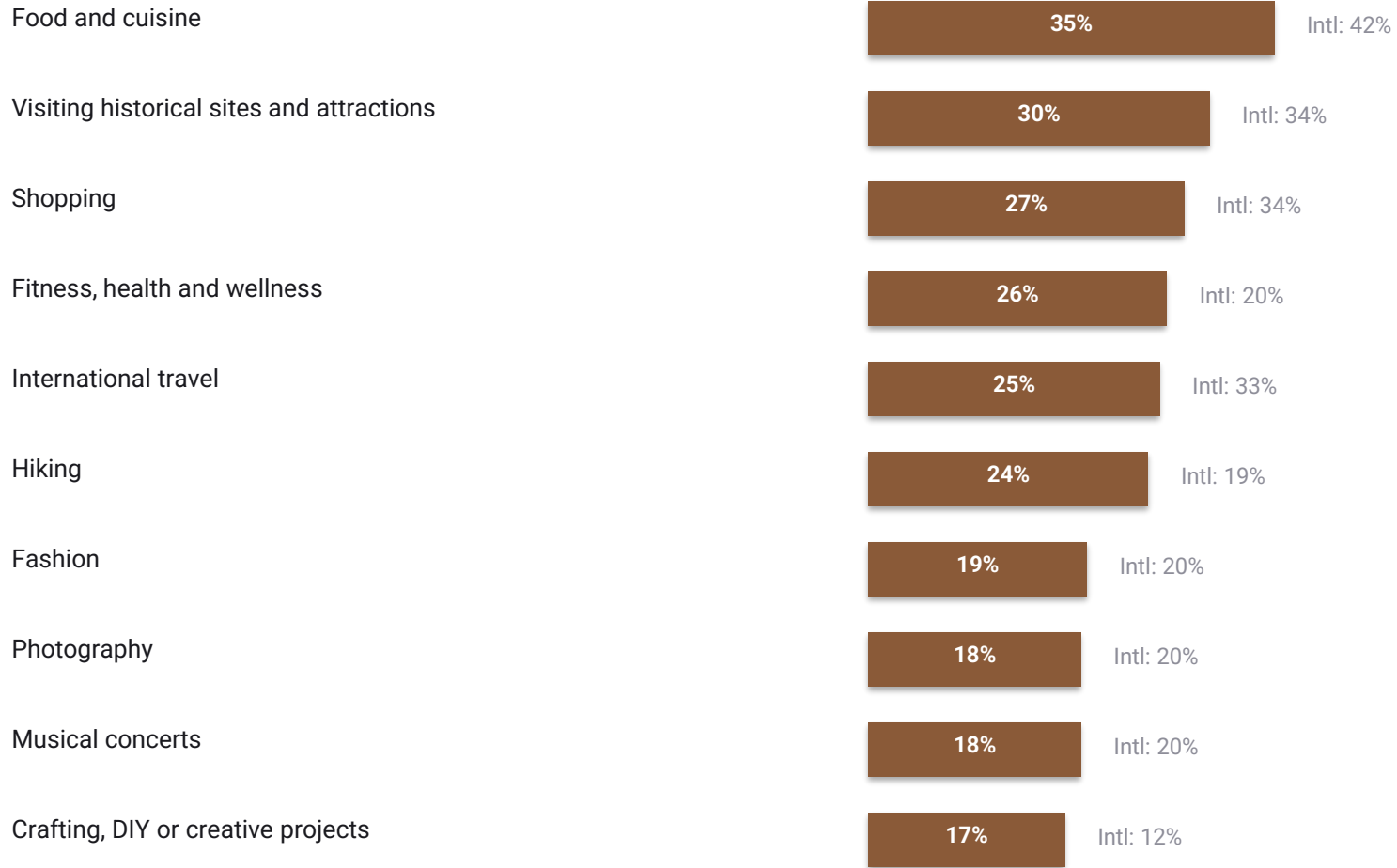
# Travel Motivations

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



## International Visitor Profile

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