



International Visitor Profile

Key Findings

- 1 2026 projected spending:** \$593.4M (+6.4% YOY). Projected visitors: 487.3K (+5.3% YOY).
- 2 Top 10 Source Markets by Spending:** Canada (\$170.4M), DACH Region (\$61.3M), UK + Ireland (\$48.2M), Brazil (\$25.6M), China (\$25.1M), India (\$23.8M), Japan (\$17.8M), France (\$13.8M), Nordics (\$11.4M), Benelux (\$11.3M).
- 3 Top 5 Growth Markets (Spending YOY):** Taiwan (+17.9%), Bulgaria (+15.6%), Indonesia (+14.4%), Philippines (+13.1%), Israel (+13.1%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-8.4%), Turkey (-1.2%), Greece (-0.1%).
- 5** Canada leads by spending (\$170.4M). Canada leads by visits (261.2K).
- 6 CAGR:** 2023-2027 projected spending CAGR (5.8%) exceeds 2015-2019 (-1.6%).
- 7 Visitor Perceptions (Intl Markets):** 67% familiarity, 75% appeal, 41% likely to visit in the next 5 years.
- 8 U.S. Trip Profile (Intl Markets):** Average spending \$5,049. Average stay: 12.3 days. Average destinations: 4.4.
- 9 Top Motivation:** For rest and relaxation (45%)
- 10 Preferred Tone:** Friendly/welcoming (45%)
- 11 Top Barrier:** Political issues/unrest (64%)

South Carolina

\$593.4M

2026 Projected Spending

+6.4% YOY vs. 2025

\$418.5M

2026 Overseas Spending

+5.5% YOY vs. 2025

\$557.5M

2025 Projected Spending

-7.9% YOY vs. 2024

\$396.7M

2025 Overseas Spending

+3.2% YOY vs. 2024

487.3K

2026 Projected Visitors

+5.3% YOY vs. 2025

213.1K

2026 Overseas Visitors

+3.1% YOY vs. 2025

462.9K

2025 Projected Visitors

-17.6% YOY vs. 2024

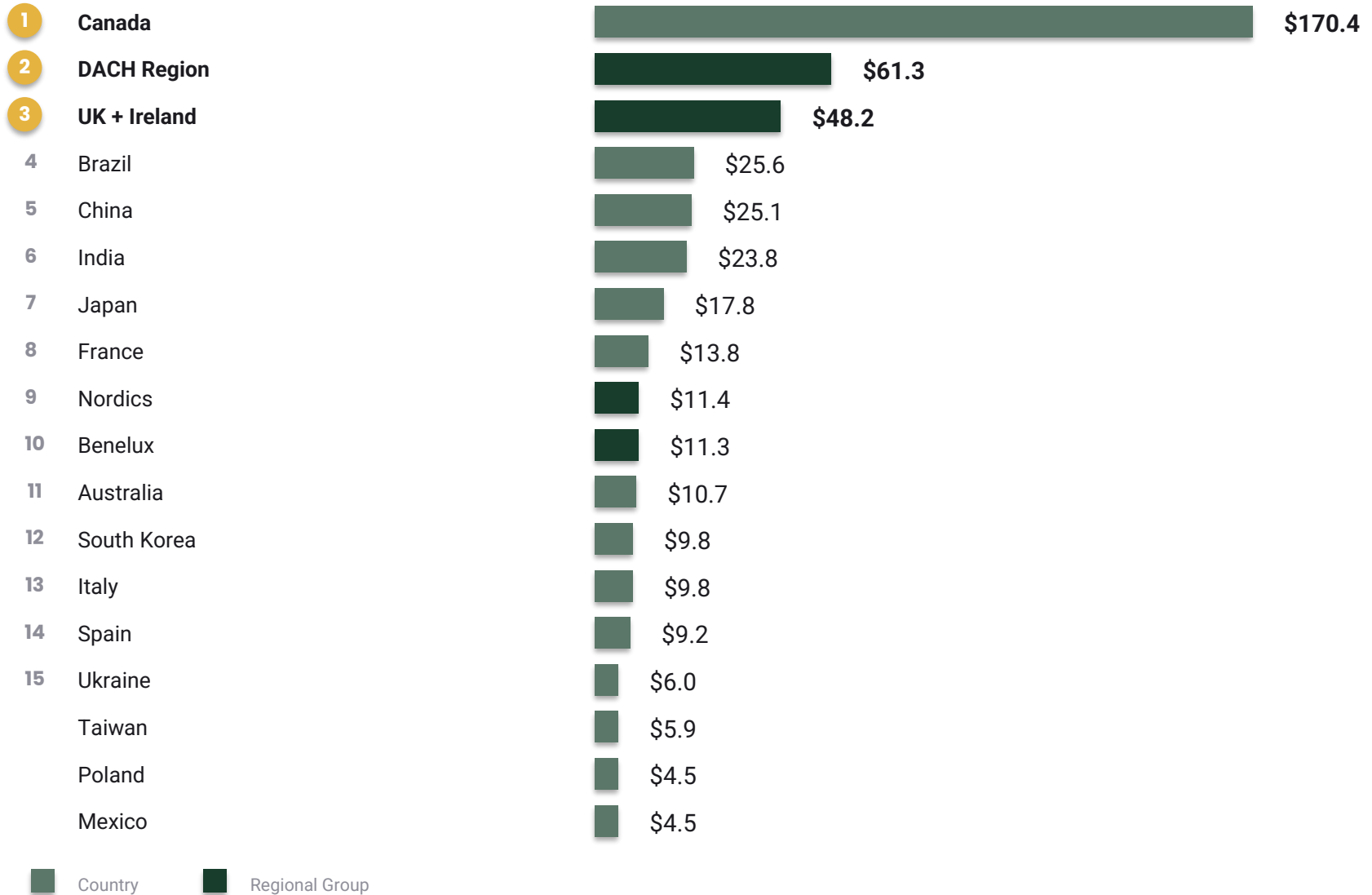
206.6K

2025 Overseas Visitors

-3.6% YOY vs. 2024

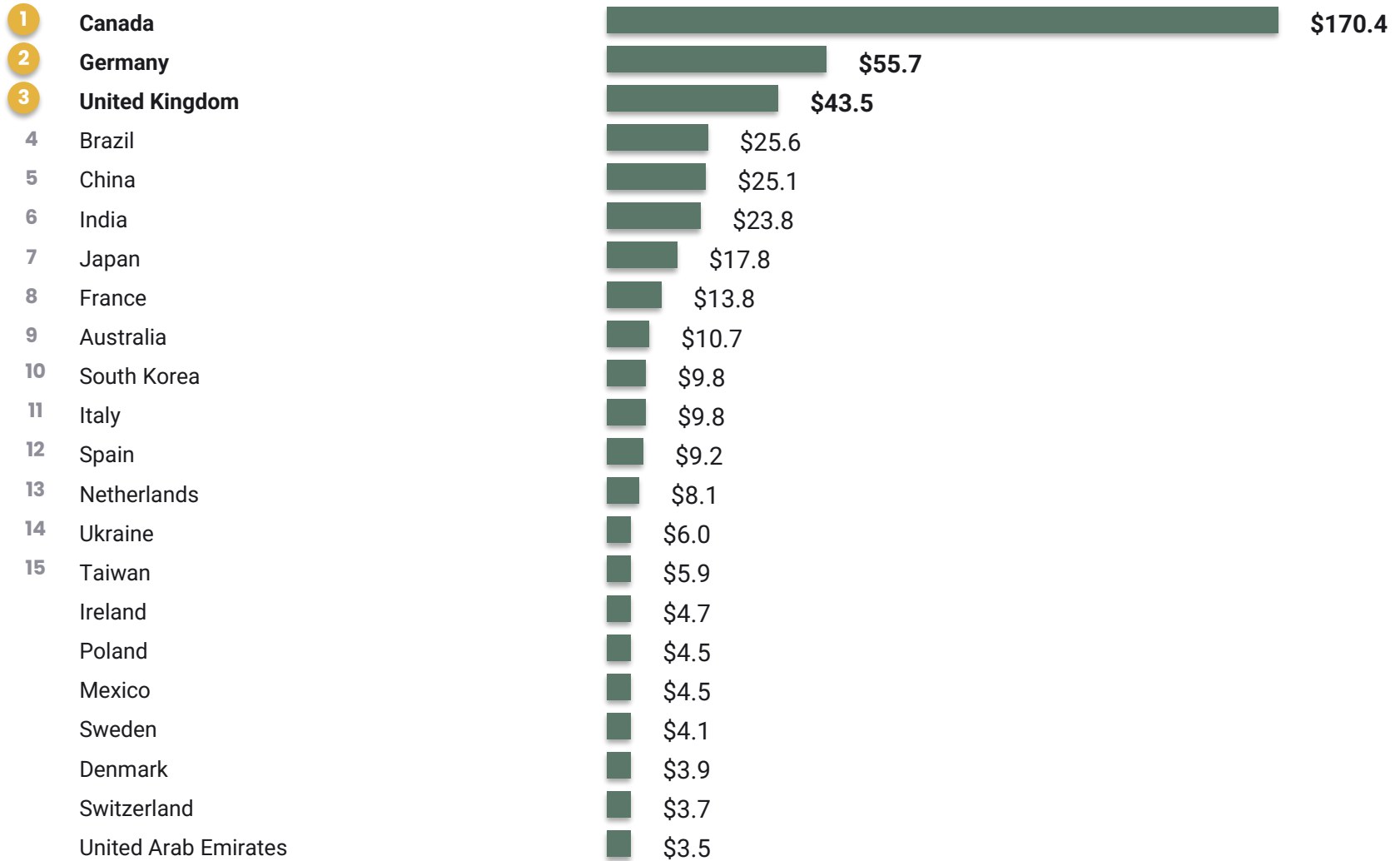
Top Source Markets | 2026 Projections

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	\$170.4	261.2	+8.8%	+7.2%
2	Germany	\$55.7	27.7	+9.5%	+5.2%
3	United Kingdom	\$43.5	23.2	+1.1%	+2.5%
4	Brazil	\$25.6	8.0	+6.1%	+2.5%
5	China	\$25.1	8.6	+3.7%	+3.2%
6	India	\$23.8	12.0	+6.0%	+1.3%
7	Japan	\$17.8	11.6	+7.0%	+7.8%
8	France	\$13.8	9.8	+3.5%	+1.4%
9	Australia	\$10.7	4.4	+5.3%	+3.1%
10	South Korea	\$9.8	7.5	+5.8%	+6.4%
11	Italy	\$9.8	6.4	+3.9%	+1.5%
12	Spain	\$9.2	5.9	+10.4%	+2.7%
13	Netherlands	\$8.1	4.7	+6.4%	+3.4%
14	Ukraine	\$6.0	0.7	+6.9%	+1.6%
15	Taiwan	\$5.9	2.4	+17.9%	+8.6%
16	Ireland	\$4.7	3.0	+4.2%	+2.8%
17	Poland	\$4.5	2.8	+2.1%	-2.4%
18	Mexico	\$4.5	12.9	+6.7%	+2.6%
19	Sweden	\$4.1	3.4	+5.7%	+2.8%
20	Denmark	\$3.9	1.9	+8.3%	+5.6%
21	Switzerland	\$3.7	2.0	+9.9%	+4.6%
22	United Arab Emirates	\$3.5	0.9	+4.9%	+10.9%

% Change | 2025 Projections vs. 2024

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

#	Market	Spending %Δ	Visits %Δ
1	Canada	-27.8%	-27.5%
2	Germany	+6.5%	-10.9%
3	United Kingdom	+13.8%	+1.2%
4	Brazil	+13.9%	-0.4%
5	China	+5.4%	-2.6%
6	India	-5.1%	-4.7%
7	Japan	+10.6%	+4.8%
8	France	-3.0%	-6.7%
9	Australia	-14.7%	-5.7%
10	South Korea	-15.3%	-4.9%
11	Italy	+14.6%	+6.6%
12	Spain	+13.8%	+2.2%
13	Netherlands	+13.2%	-6.9%
14	Ukraine	+35.7%	+6.3%
15	Taiwan	+29.9%	+6.7%
16	Ireland	-1.9%	+0.2%
17	Poland	-3.0%	+4.8%
18	Mexico	+4.6%	+8.6%
19	Sweden	-12.8%	-4.9%
20	Denmark	-25.2%	-23.0%
21	Switzerland	-20.7%	-9.2%
22	United Arab Emirates	+3.4%	-4.2%

 Decline  Growth

Growth Trajectory

2015-2019 CAGR

-1.6%

Spending

-1.9%

Visits

2023-2027 PROJECTED CAGR

5.8%

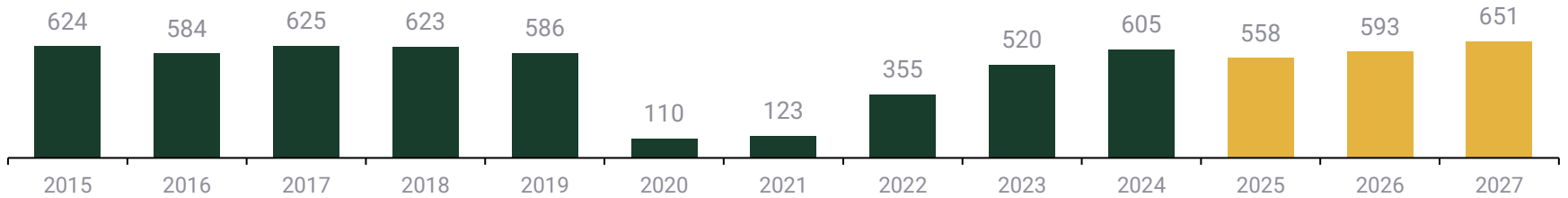
Spending

-0.1%

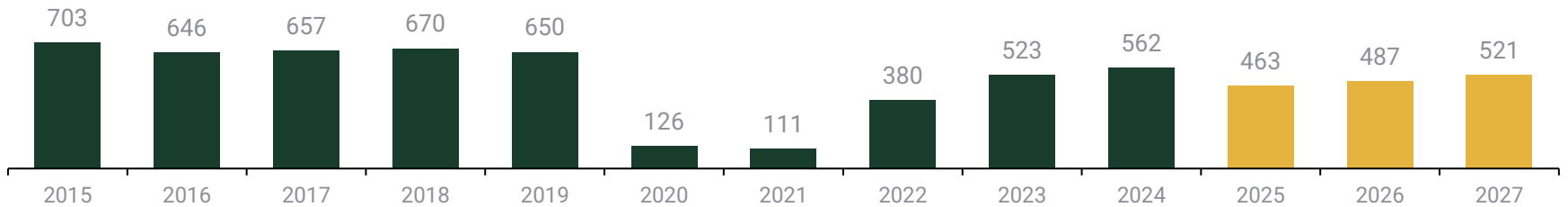
Visits

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

Brazil

1.9%

GDP % Change

5.15

BRL/USD

China

4.2%

GDP % Change

6.84

CNY/USD

India

6.2%

GDP % Change

90.92

INR/USD

Japan

0.6%

GDP % Change

156.13

JPY/USD

France

0.9%

GDP % Change

1.18

EUR/USD

Australia

2.1%

GDP % Change

0.71

AUD/USD

South Korea

1.8%

GDP % Change

1,433.32

KRW/USD

Visitor Perceptions | The American South

International Markets

67%

Familiarity

75%

Appeal

29%

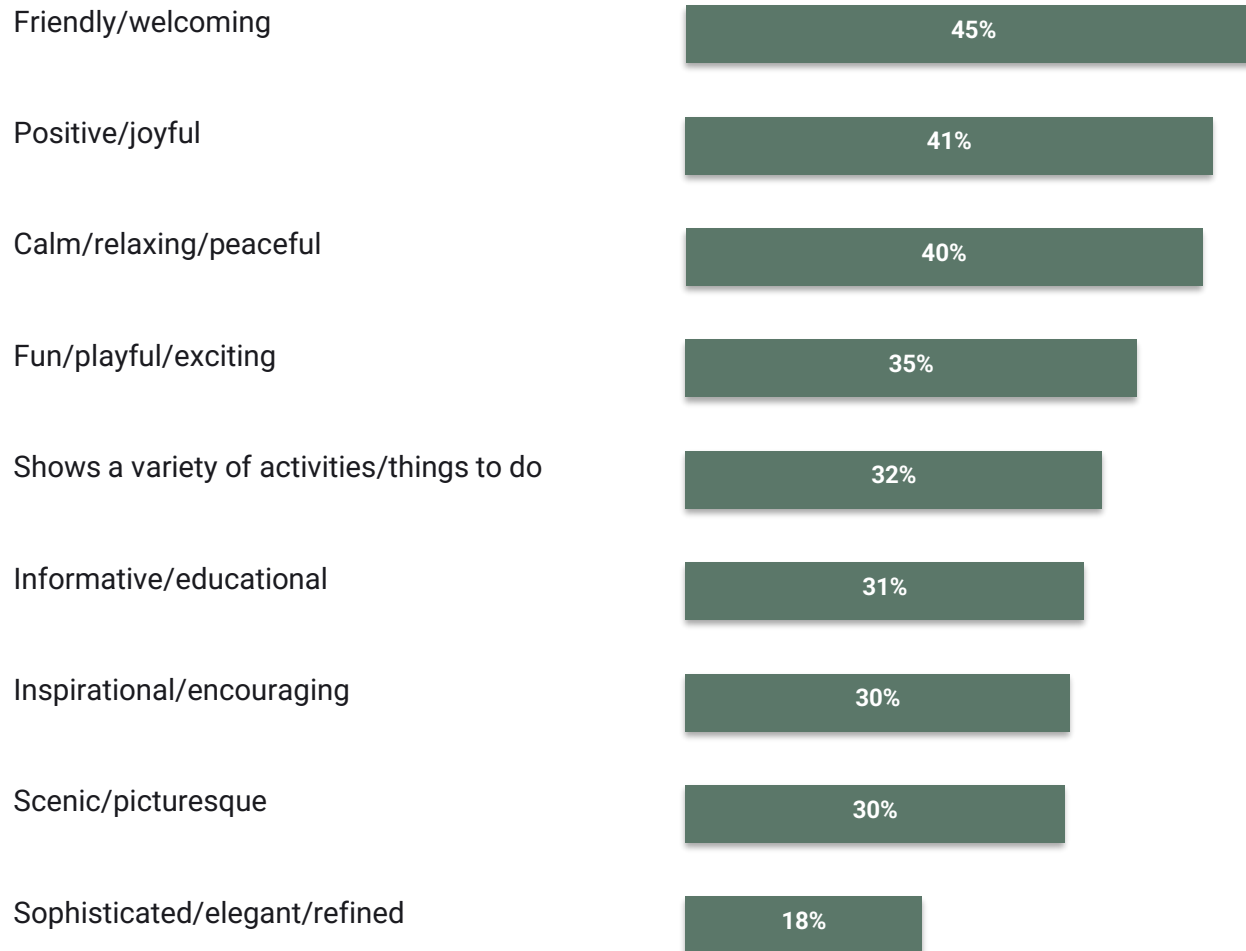
Promotional Buzz

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

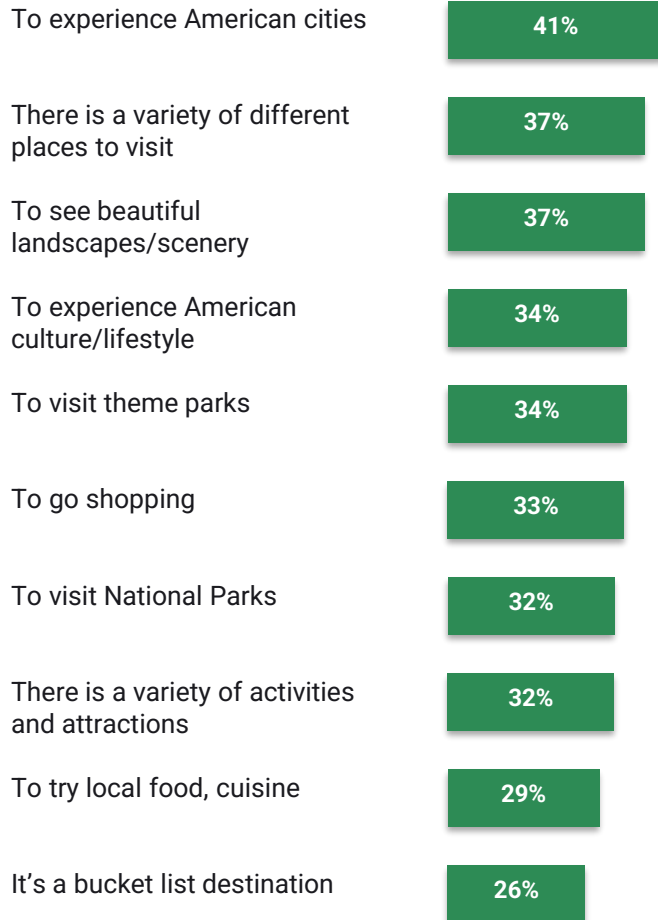
Total

Intl: \$5,049

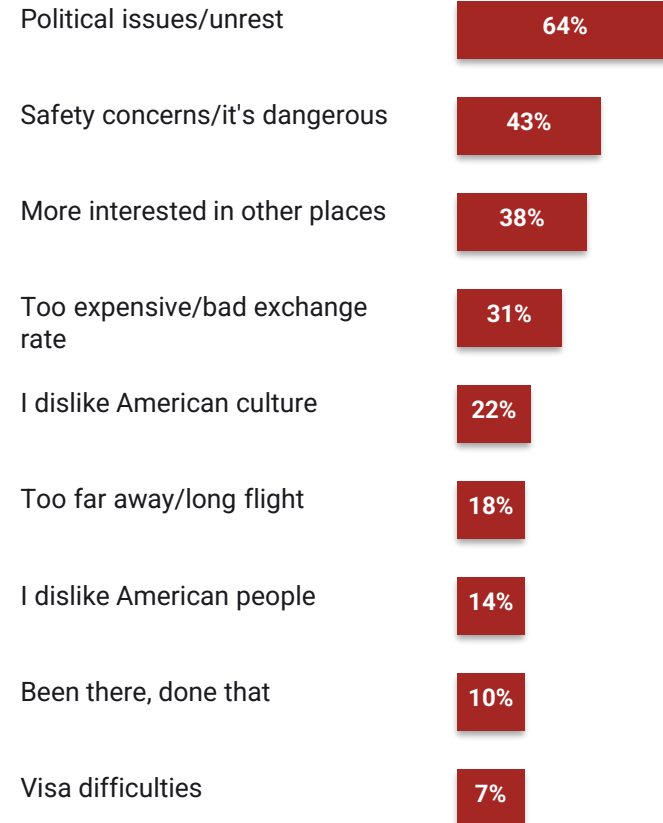
Enablers & Barriers to Visiting

International Markets

Enablers

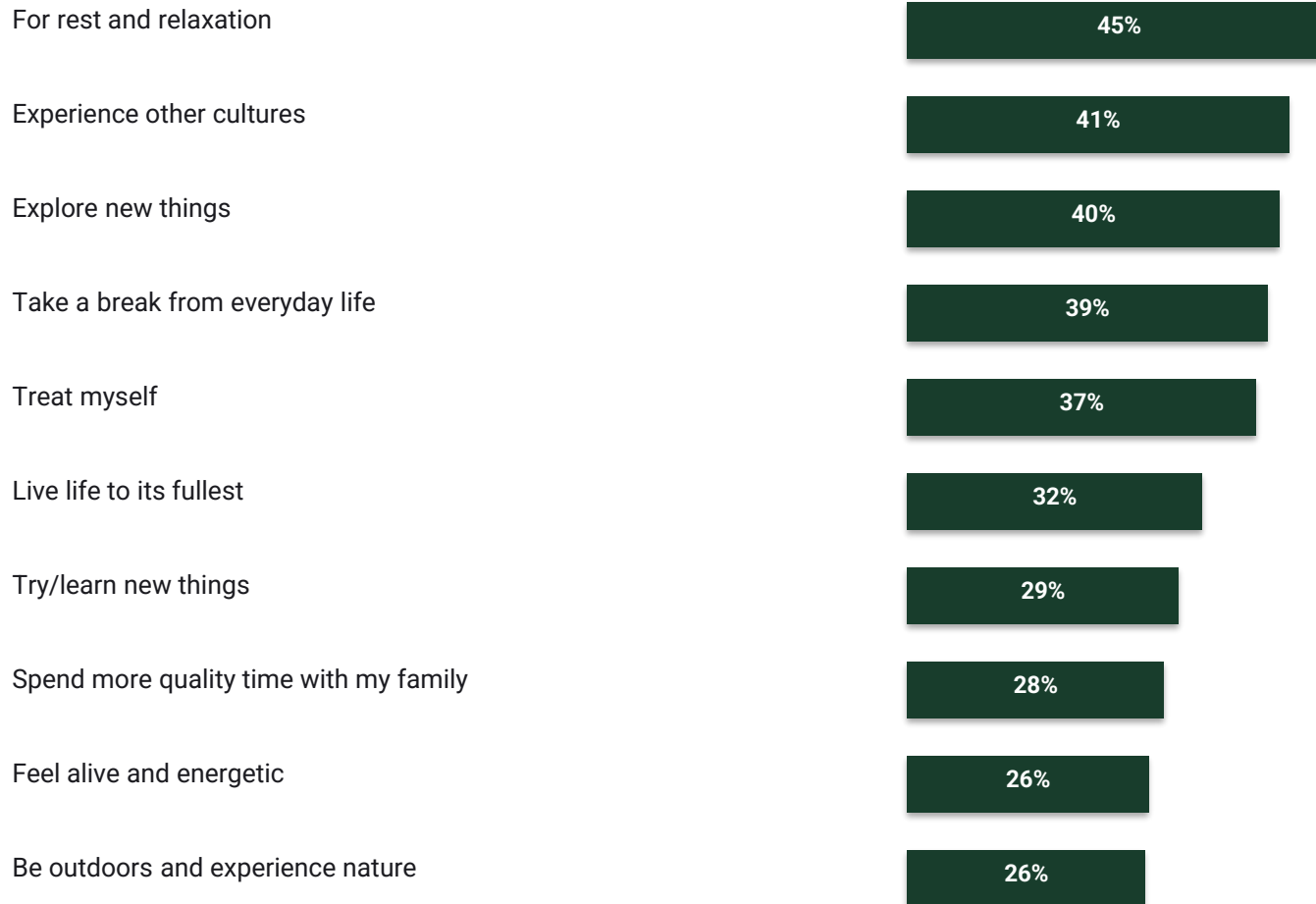


Barriers



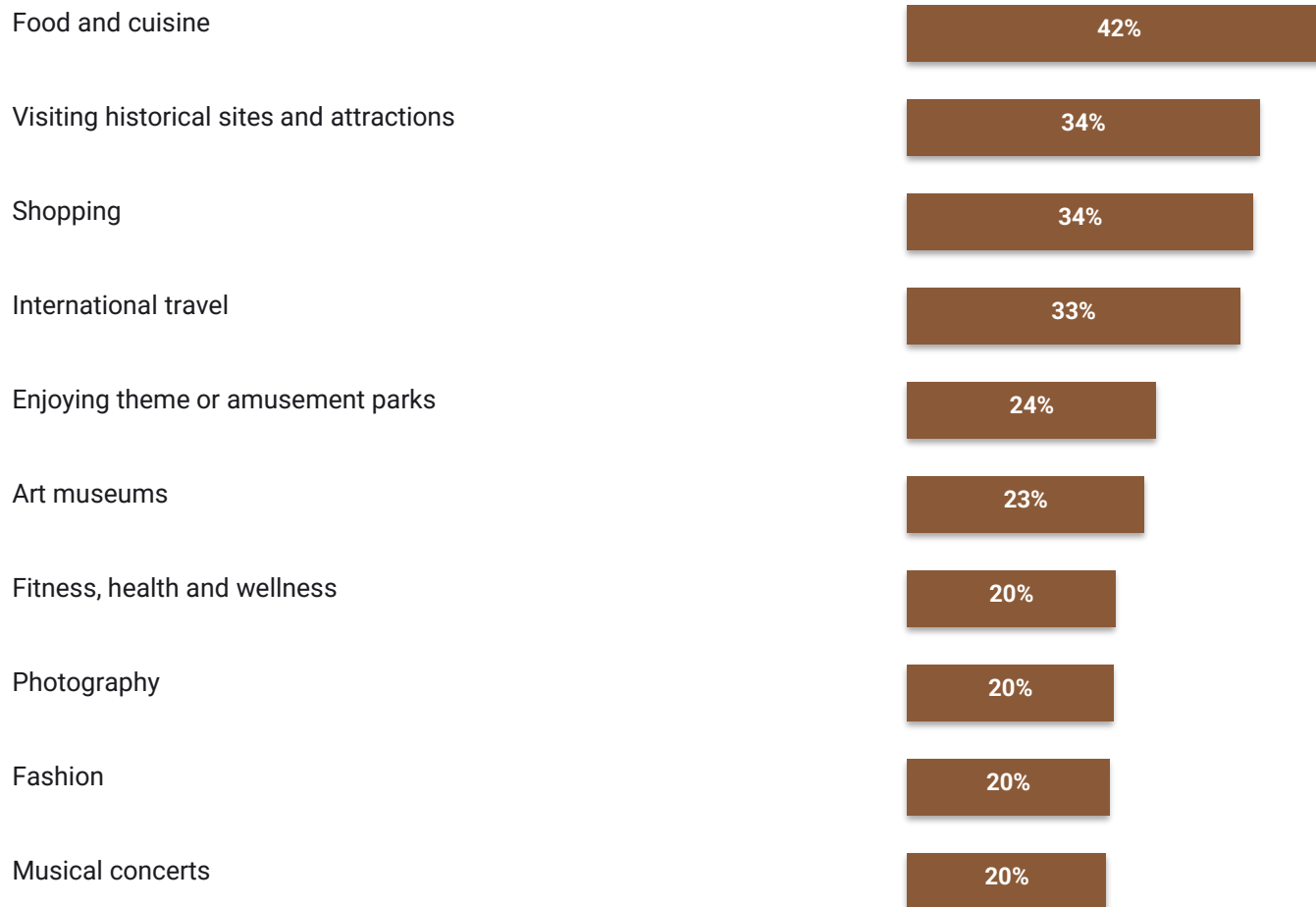
Travel Motivations

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 | South Carolina

#1 by Spending | #1 by Visits

DISCOVER
South Carolina

TravelSouth
All Y'all Are Welcome USA

Canada | Key Findings

- 1 2026 South Carolina projected spending:** \$170.4M (+8.8% YOY). Projected visitors: 261.3K (+7.2% YOY). Ranks #1 by spending and #1 by visits among South 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 (-0.9%) exceeds 2015-2019 (-8.1%).
- 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

\$170.4M

2026 South Carolina Spending

+8.8% YOY vs. 2025

261.3K

2026 South Carolina Visitors

+7.2% YOY vs. 2025

\$16.4B

2026 USA Spending

+7.6% YOY vs. 2025

20.9M

2026 USA Visitors

+6.6% YOY vs. 2025

\$156.6M

2025 South Carolina Spending

-27.8% YOY vs. 2024

243.7K

2025 South Carolina Visitors

-27.5% 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

-8.1%

Spending

-4.3%

Visits

2023-2027 PROJECTED CAGR

-0.9%

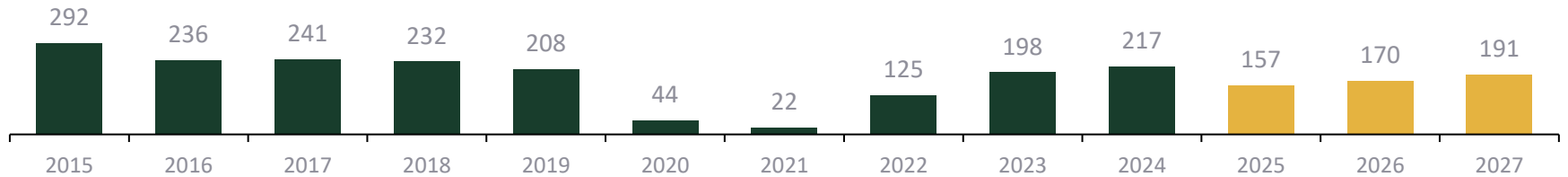
Spending

-3.6%

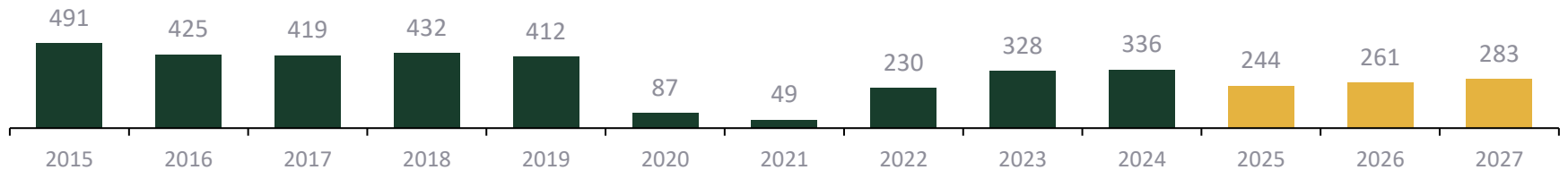
Visits

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%

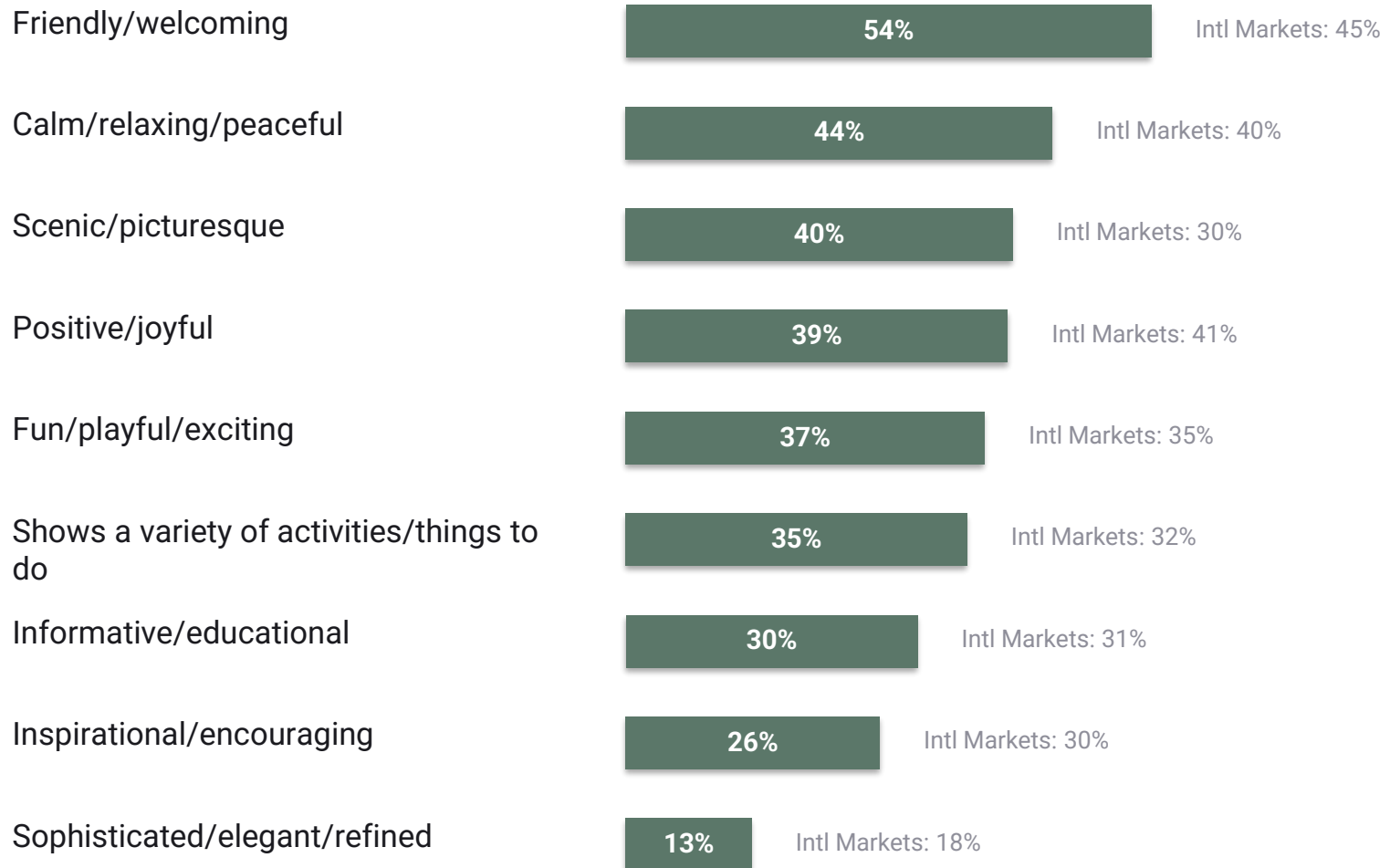
38%

Likely to Visit (5yr)

Intl Markets: 41%

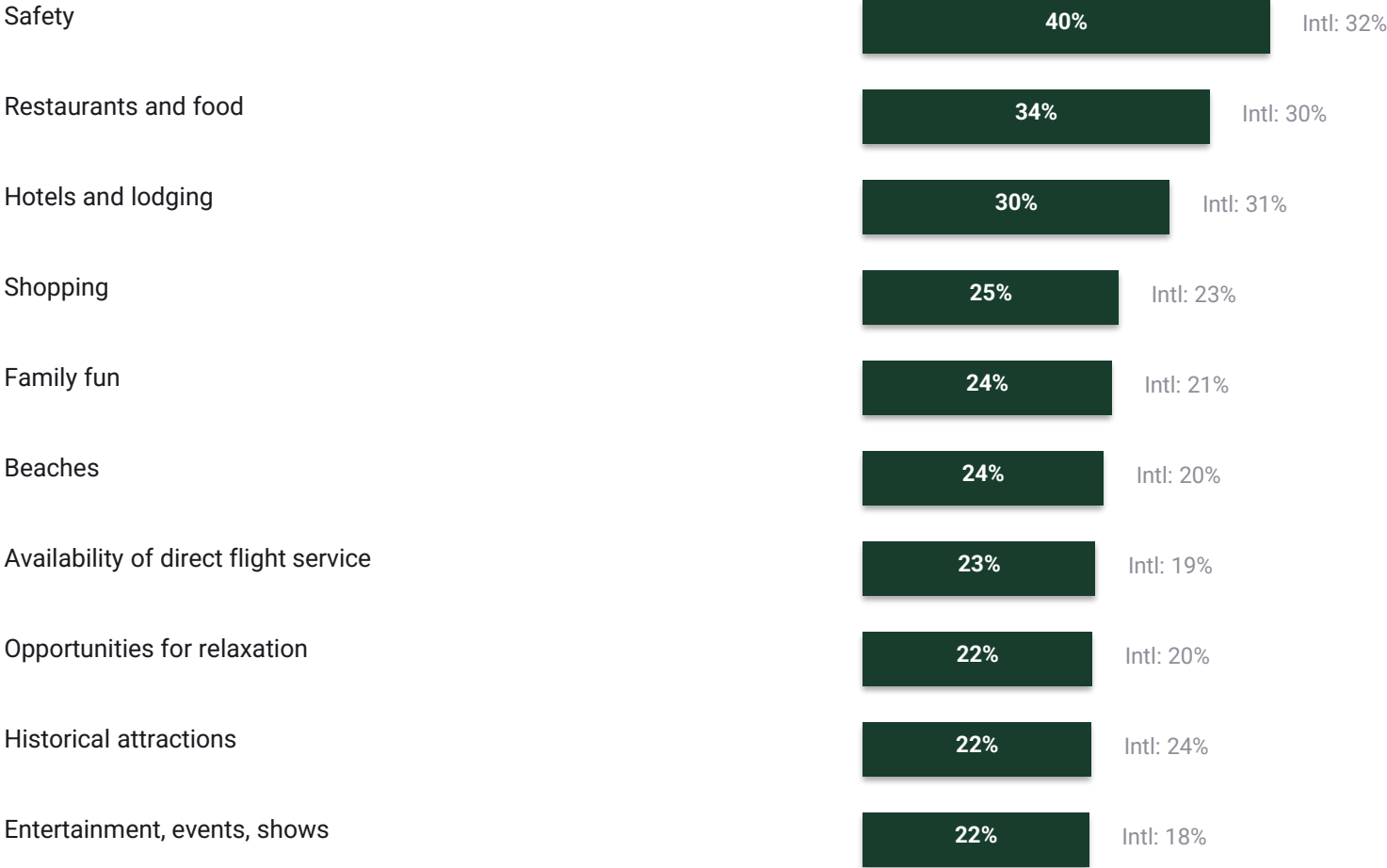
Desired Travel Promotion Tone

Canada



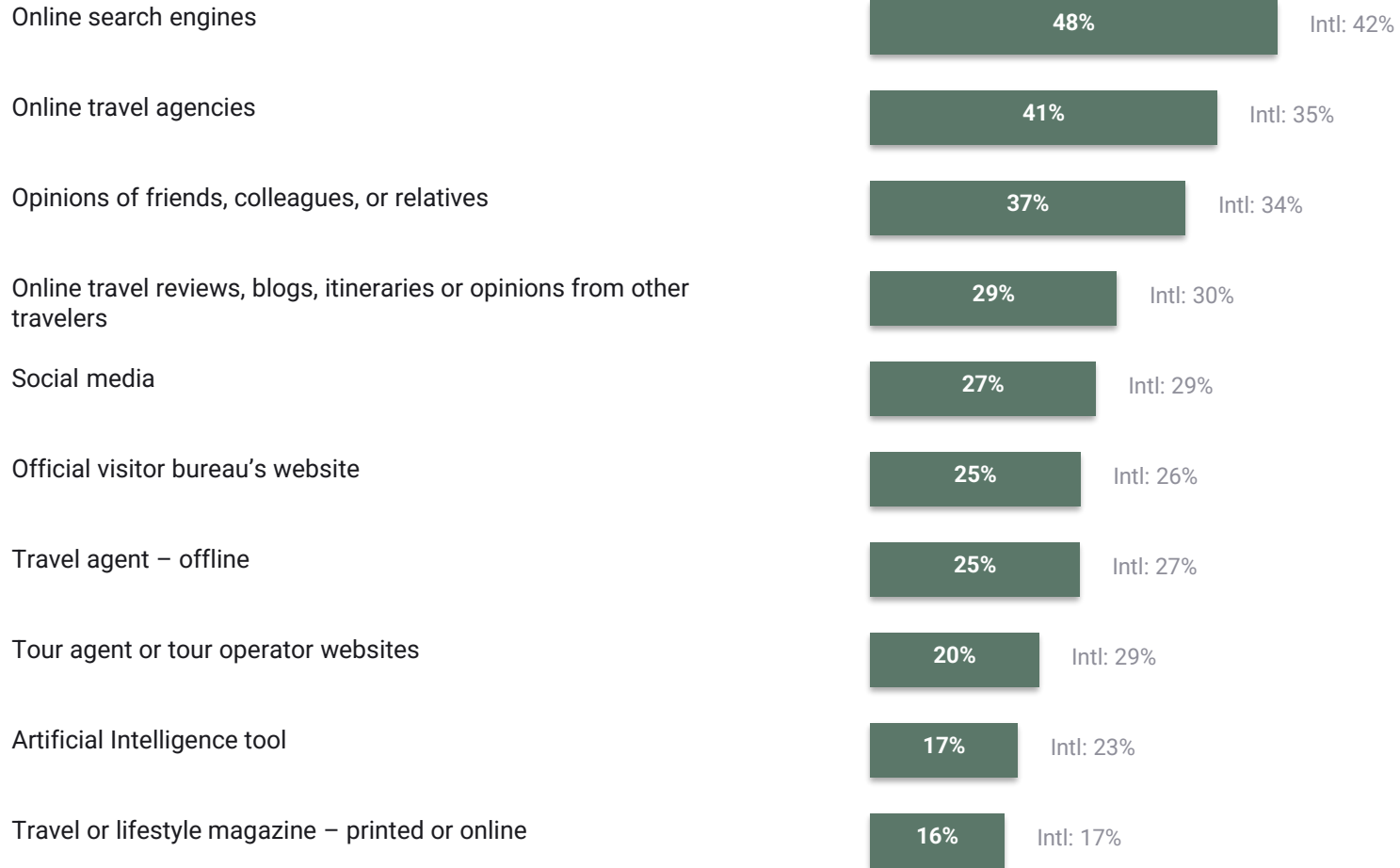
Top Information Sources

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

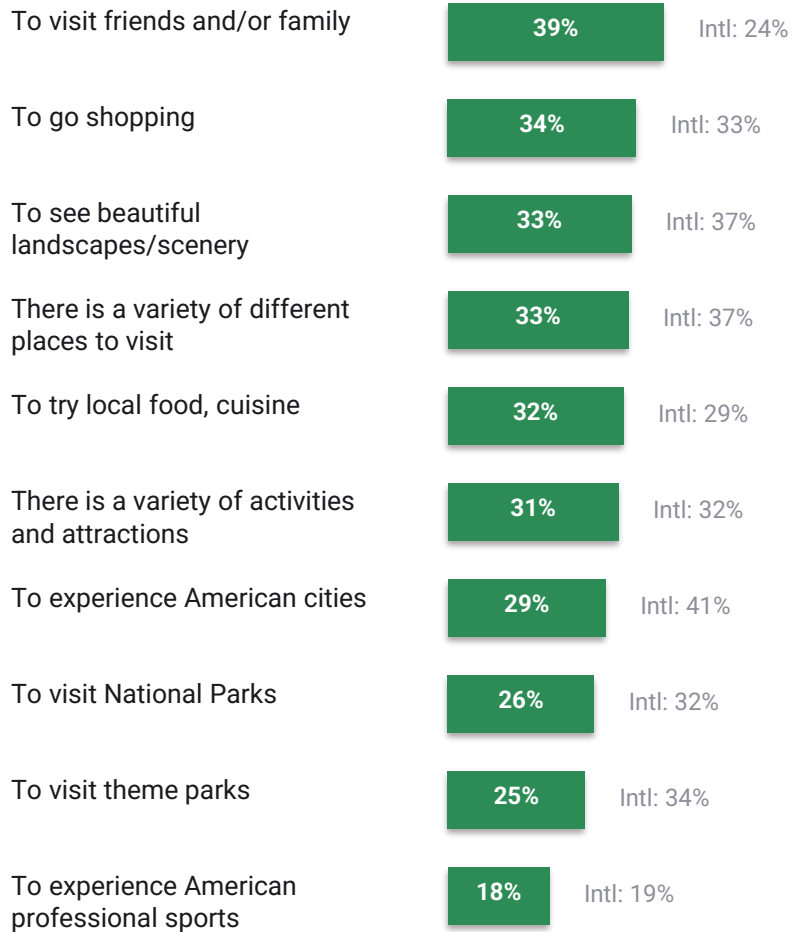
Total

Intl: \$5,049

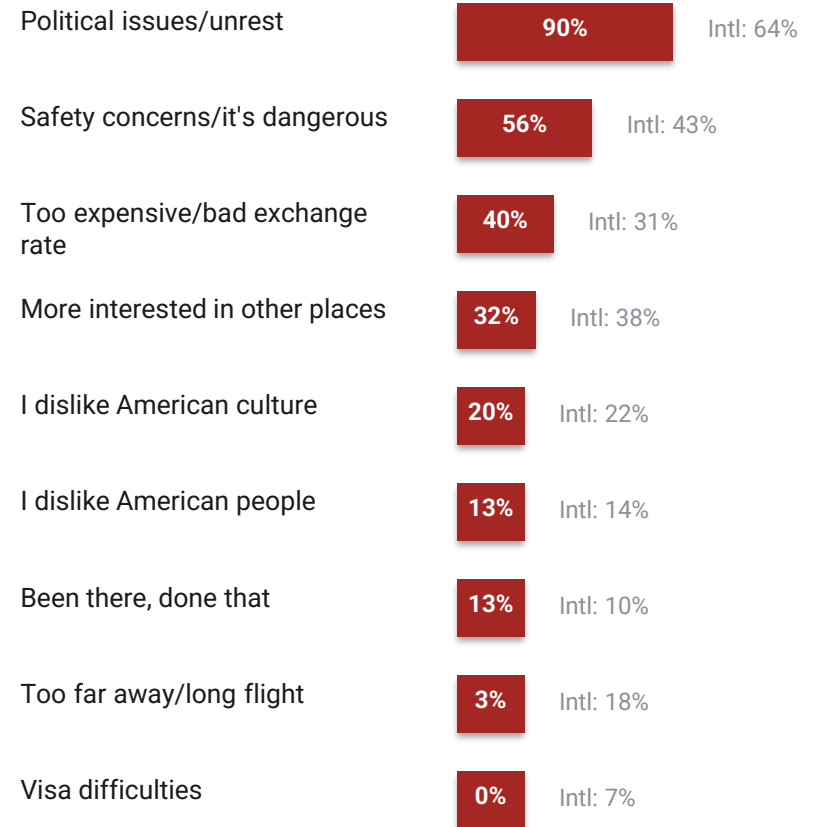
Enablers & Barriers to Visiting

Canada

Enablers

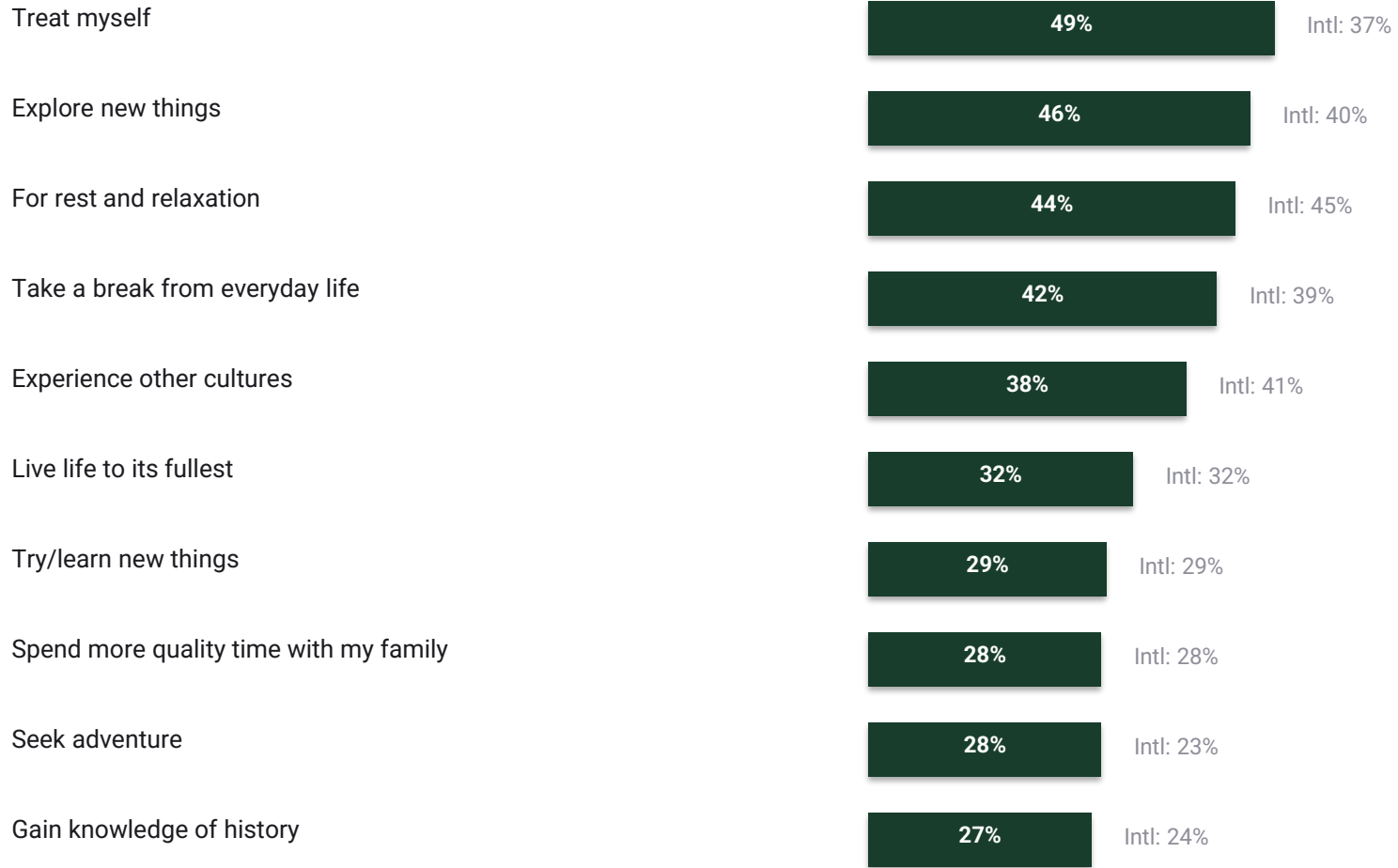


Barriers



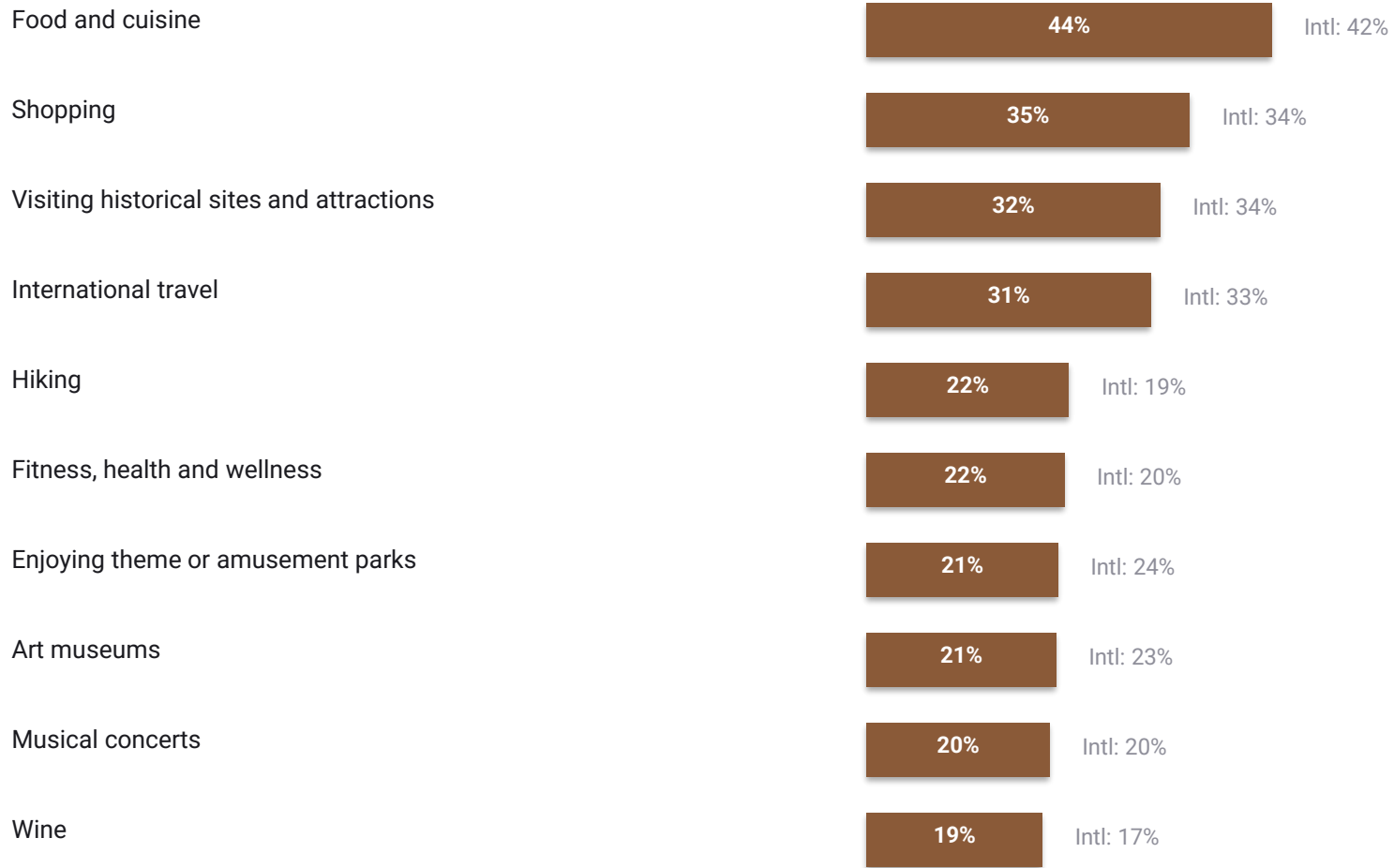
Travel Motivations

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

GERMANY

Source Market Analysis | South Carolina

#2 by Spending | #2 by Visits

DISCOVER
South Carolina

TravelSouth
All Y'all Are Welcome USA

Germany | Key Findings

- 1 2026 South Carolina projected spending:** \$55.7M (+9.4% YOY). Projected visitors: 27.7K (+4.9% YOY). Ranks #2 by spending and #2 by visits among South 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 (8.9%) exceeds 2015-2019 (2.6%).
- 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

\$55.7M

2026 South Carolina Spending

+9.4% YOY vs. 2025

27.7K

2026 South Carolina Visitors

+4.9% YOY vs. 2025

\$6.3B

2026 USA Spending

+7.7% YOY vs. 2025

2.8M

2026 USA Visitors

+3.8% YOY vs. 2025

\$50.9M

2025 South Carolina Spending

+6.5% YOY vs. 2024

26.4K

2025 South Carolina Visitors

-10.8% 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

2.6%

Spending

1.6%

Visits

2023-2027 PROJECTED CAGR

8.9%

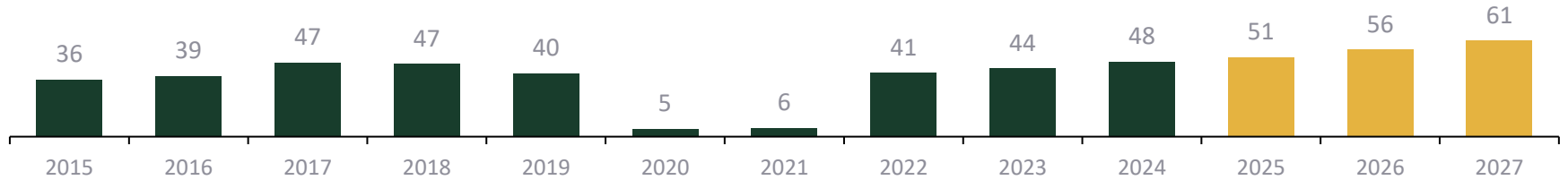
Spending

3%

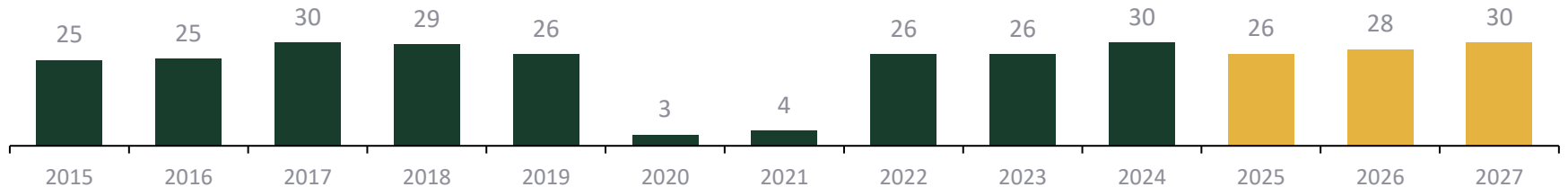
Visits

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%

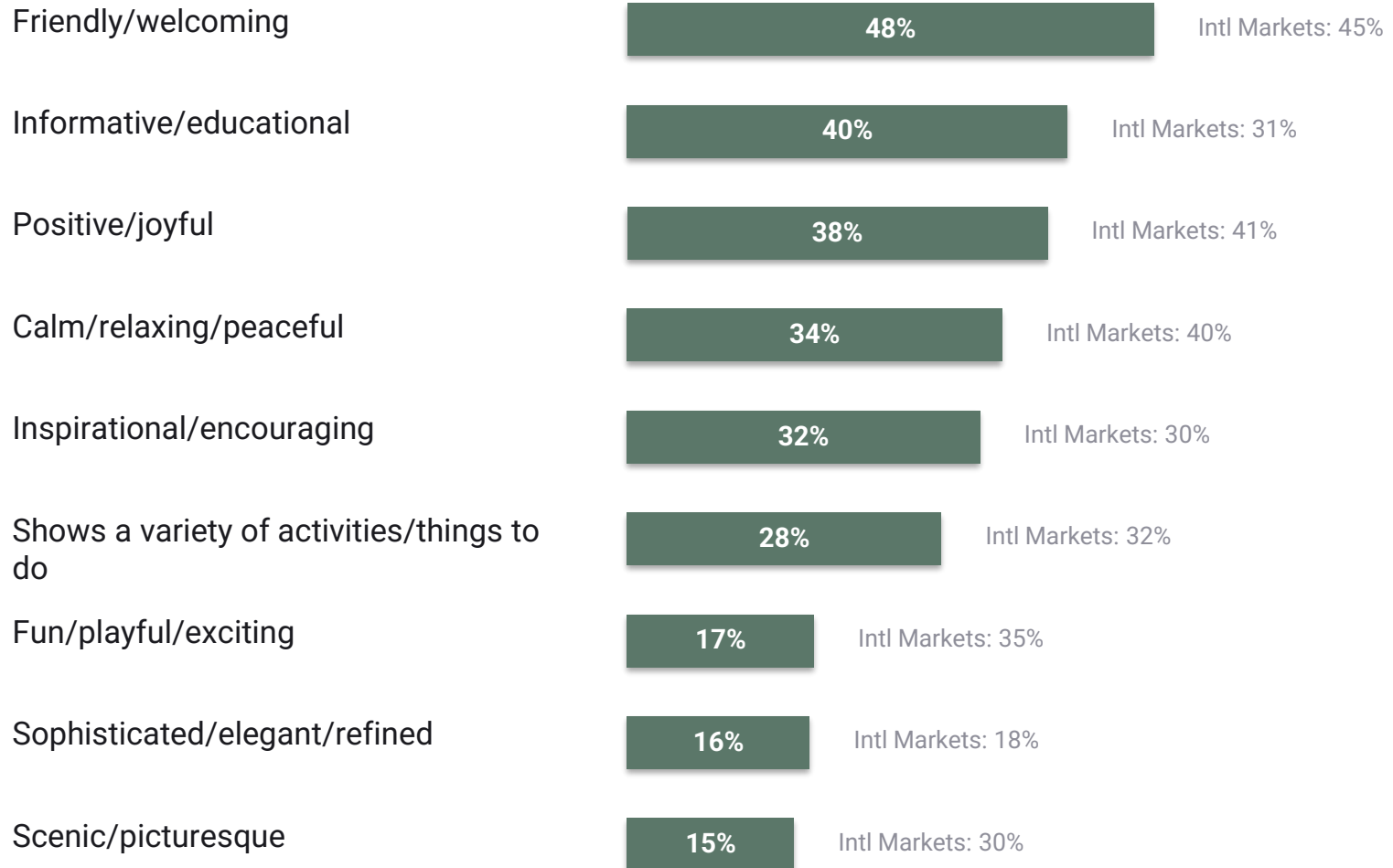
36%

Likely to Visit (5yr)

Intl Markets: 41%

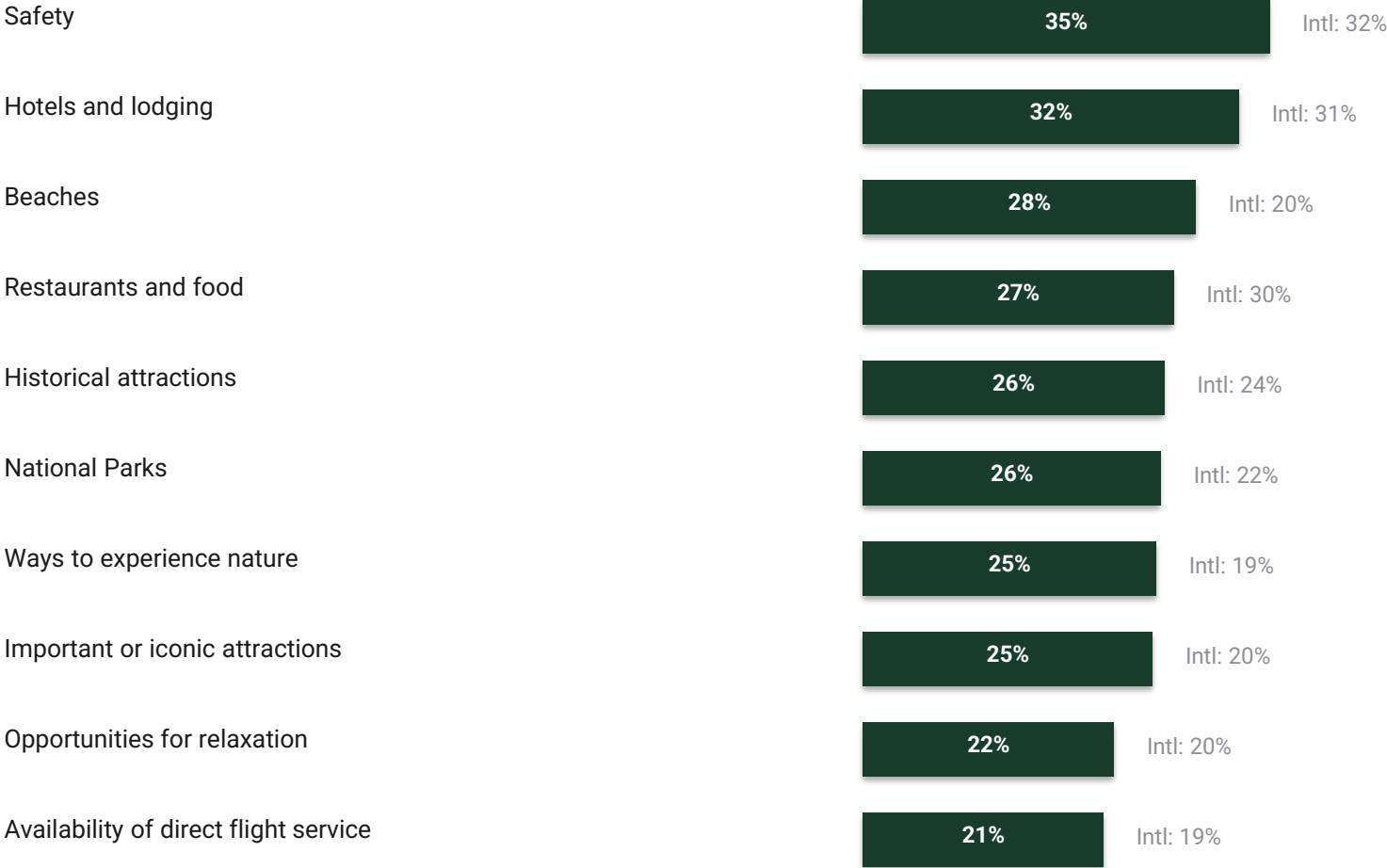
Desired Travel Promotion Tone

Germany



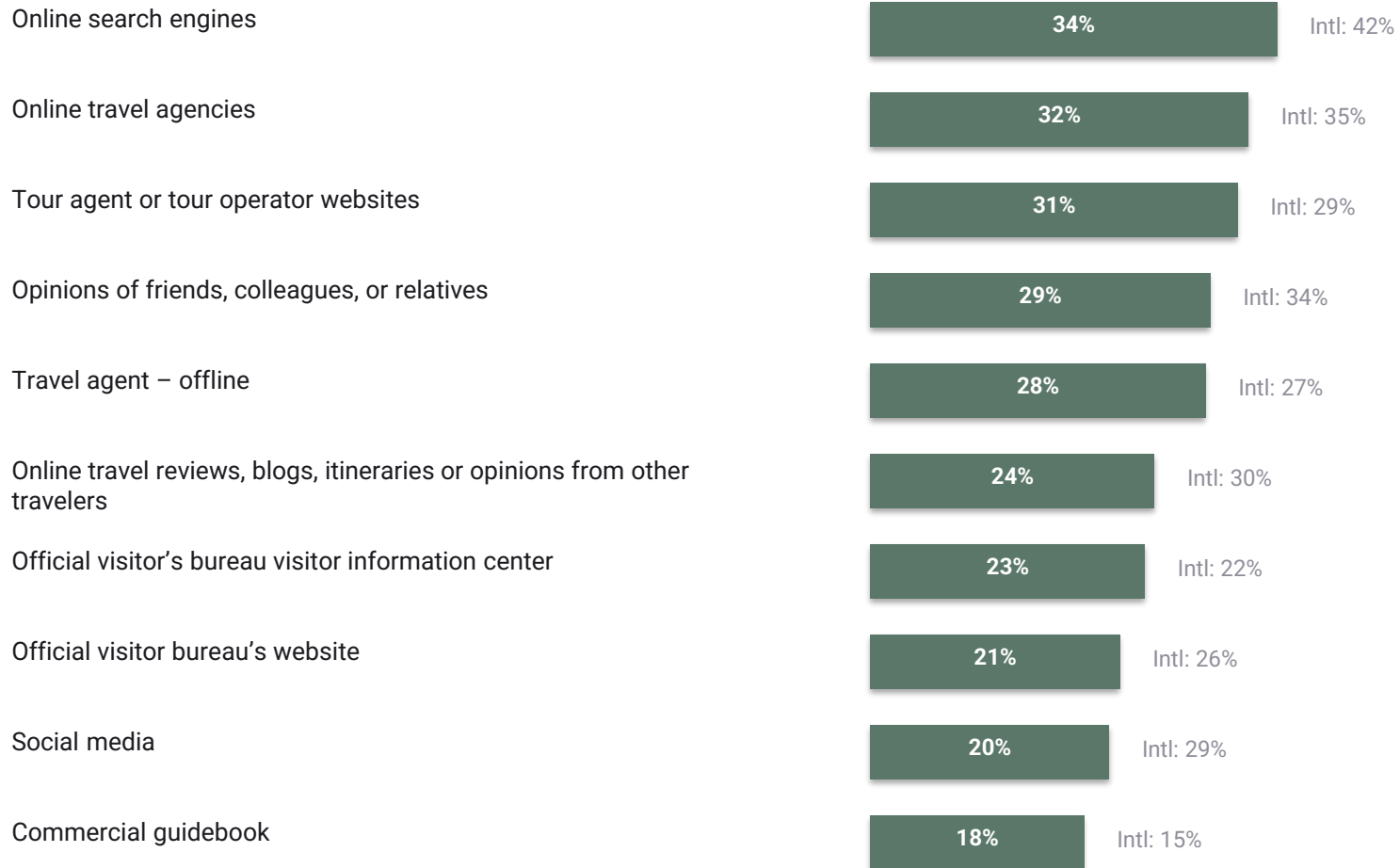
Top Information Sources

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

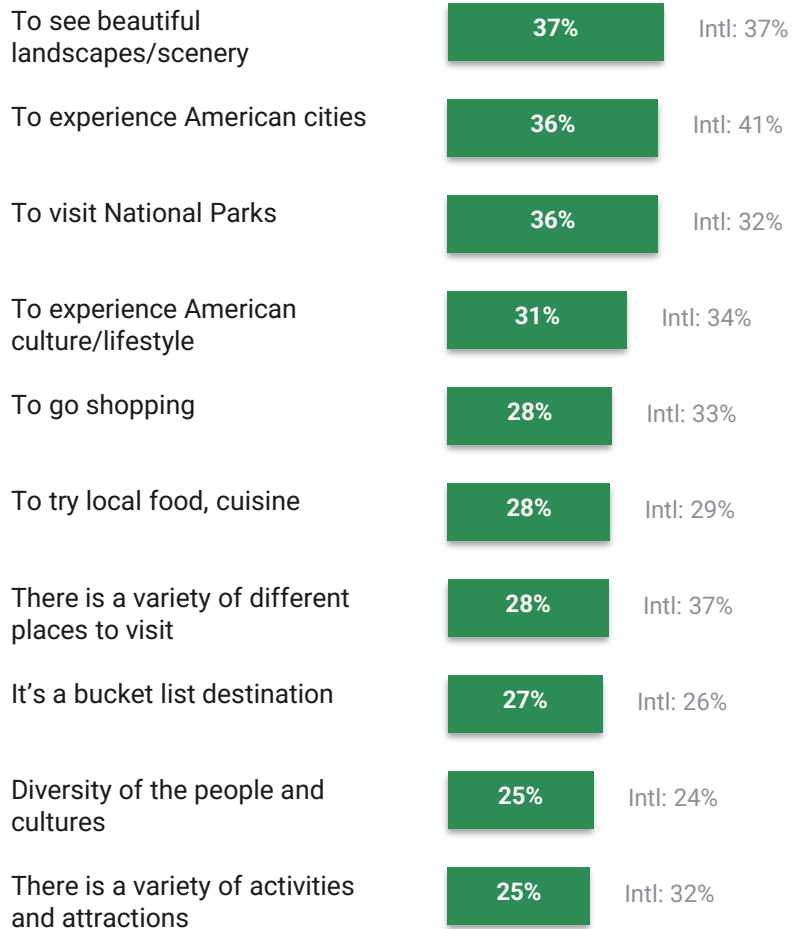
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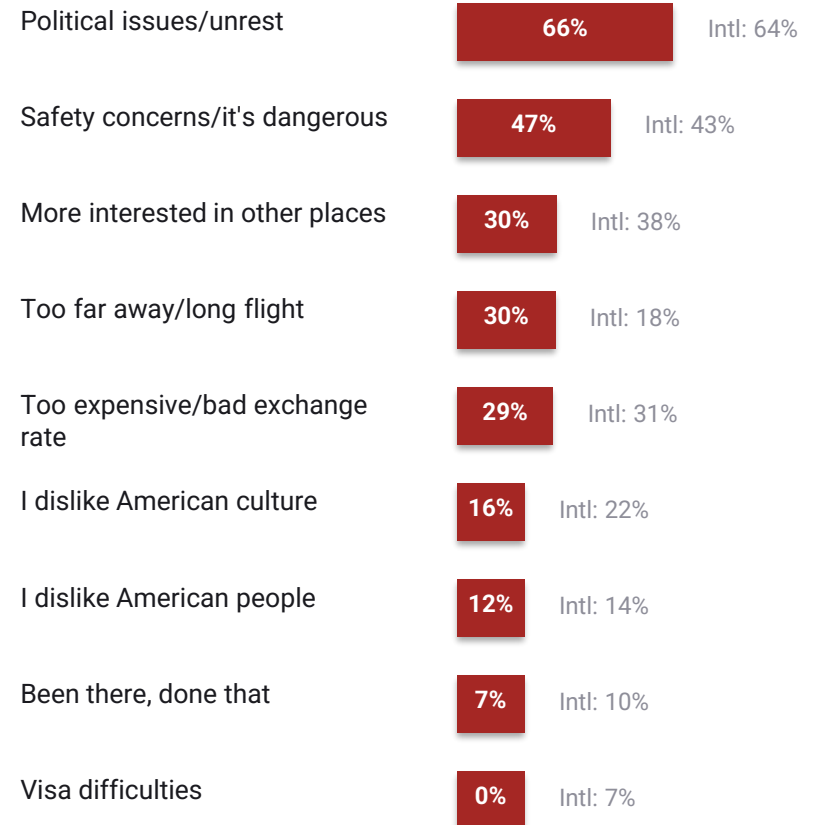
Enablers & Barriers to Visiting

Germany

Enablers

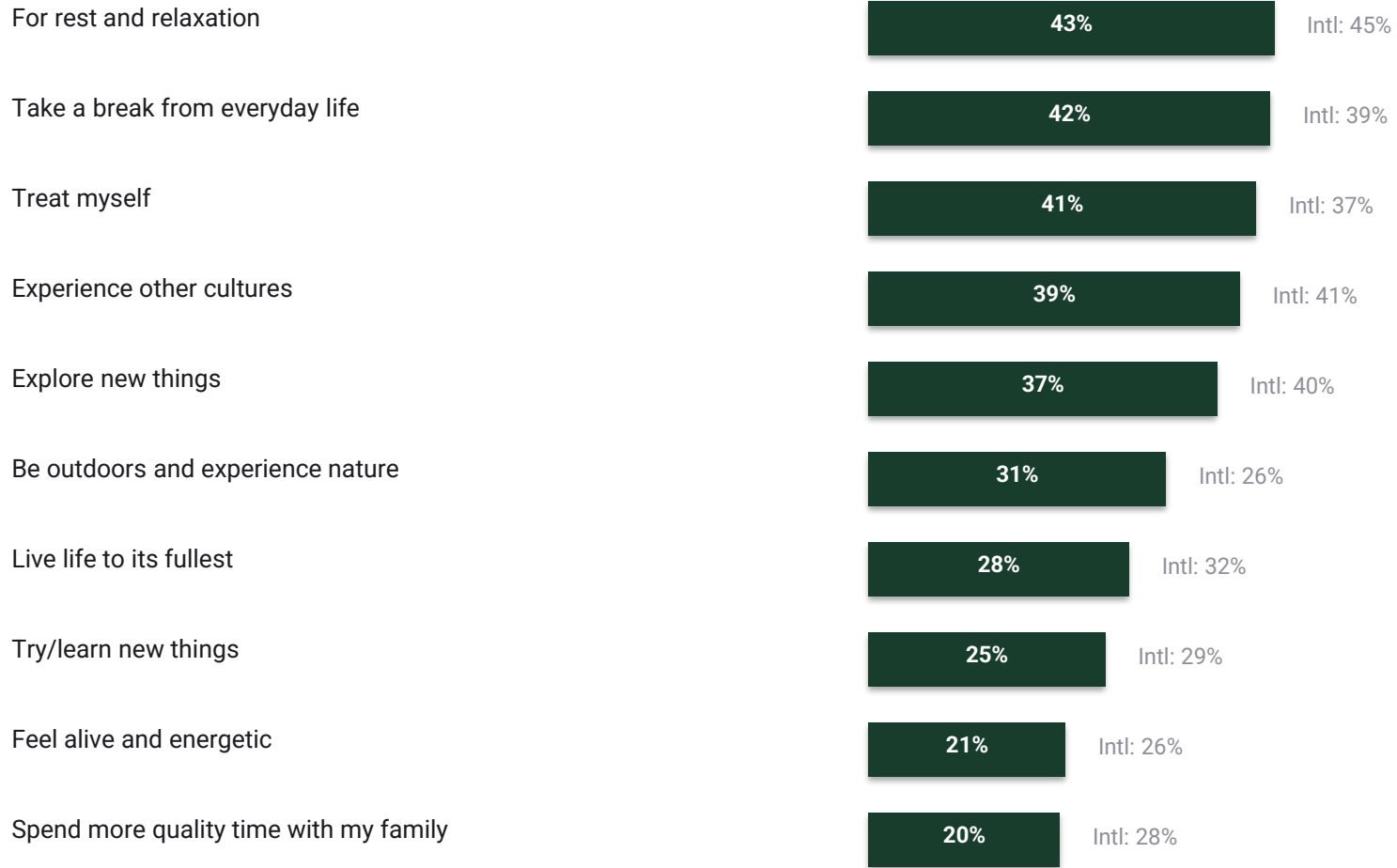


Barriers



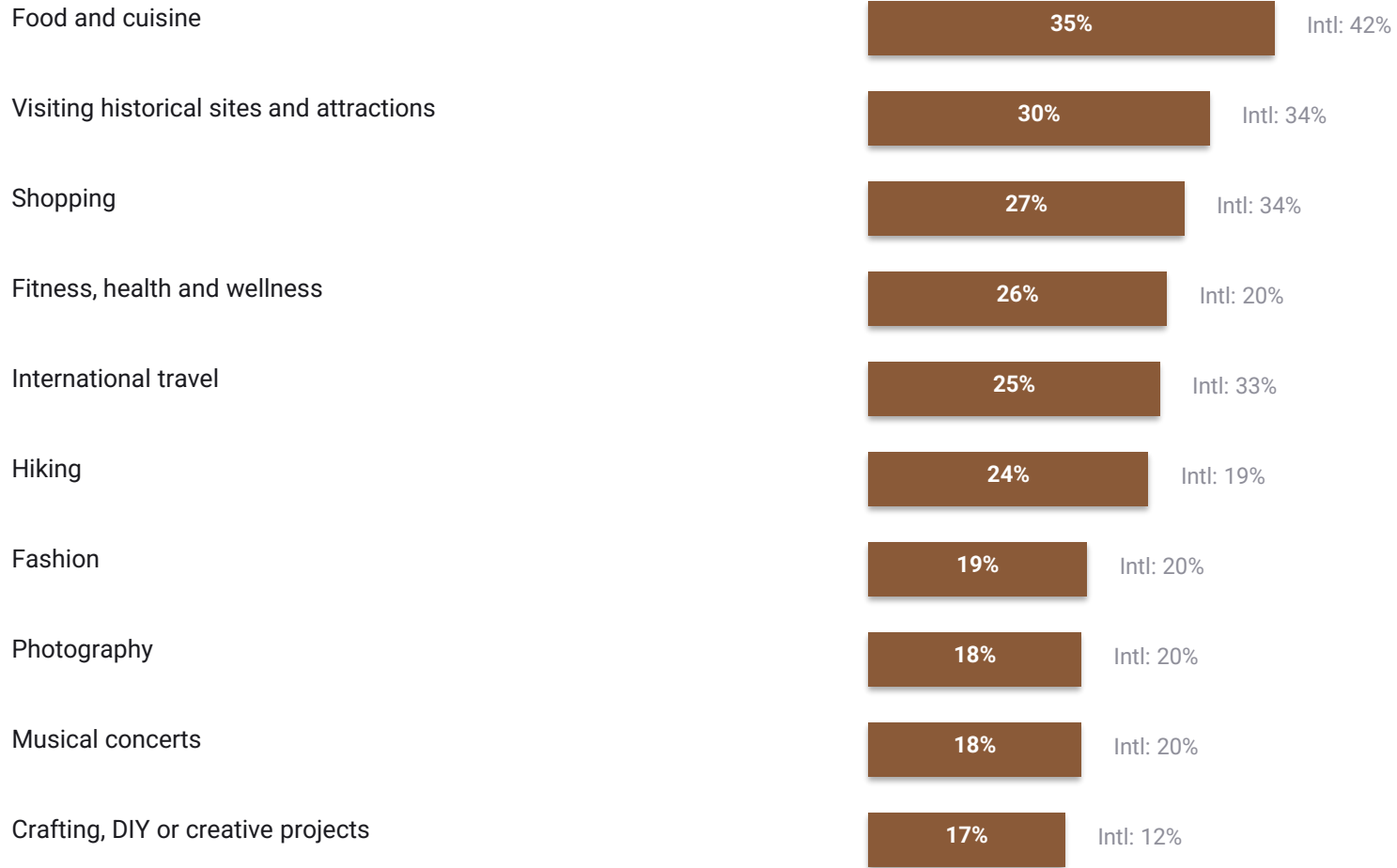
Travel Motivations

Germany



Hobbies & Passions

Germany



Travel Trends & Outlook

Germany

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51%

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21%

Intl: 27%

Germany

Intl Markets

UNITED KINGDOM

Source Market Analysis | South Carolina

#3 by Spending | #3 by Visits

DISCOVER
South Carolina

TravelSouth
All Y'all Are Welcome USA

United Kingdom | Key Findings

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- 7 Top Enabler:** To experience American cities (45%)
- 8 Preferred Tone:** Friendly/welcoming (54%)
- 9 Top Barrier:** Political issues/unrest (72%)

United Kingdom

\$43.5M

2026 South Carolina Spending

+1.2% YOY vs. 2025

23.2K

2026 South Carolina Visitors

+2.7% YOY vs. 2025

\$11.9B

2026 USA Spending

+3.3% YOY vs. 2025

5.8M

2026 USA Visitors

+3.5% YOY vs. 2025

\$43M

2025 South Carolina Spending

+14.1% YOY vs. 2024

22.6K

2025 South Carolina Visitors

+0.9% 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

3.2%

Spending

1.5%

Visits

2023-2027 PROJECTED CAGR

8%

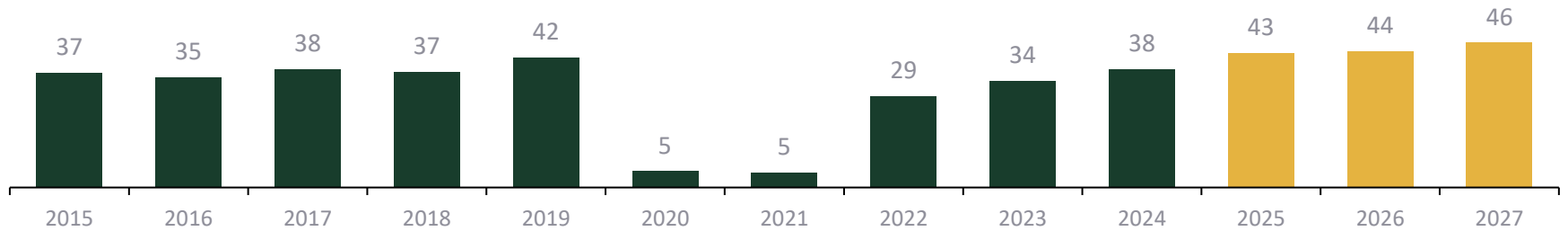
Spending

4%

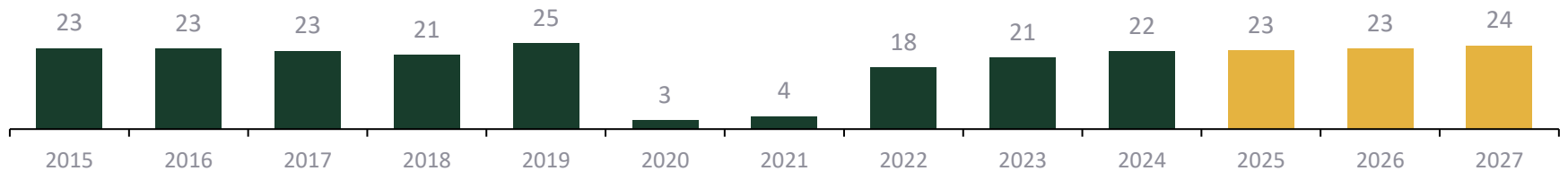
Visits

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%

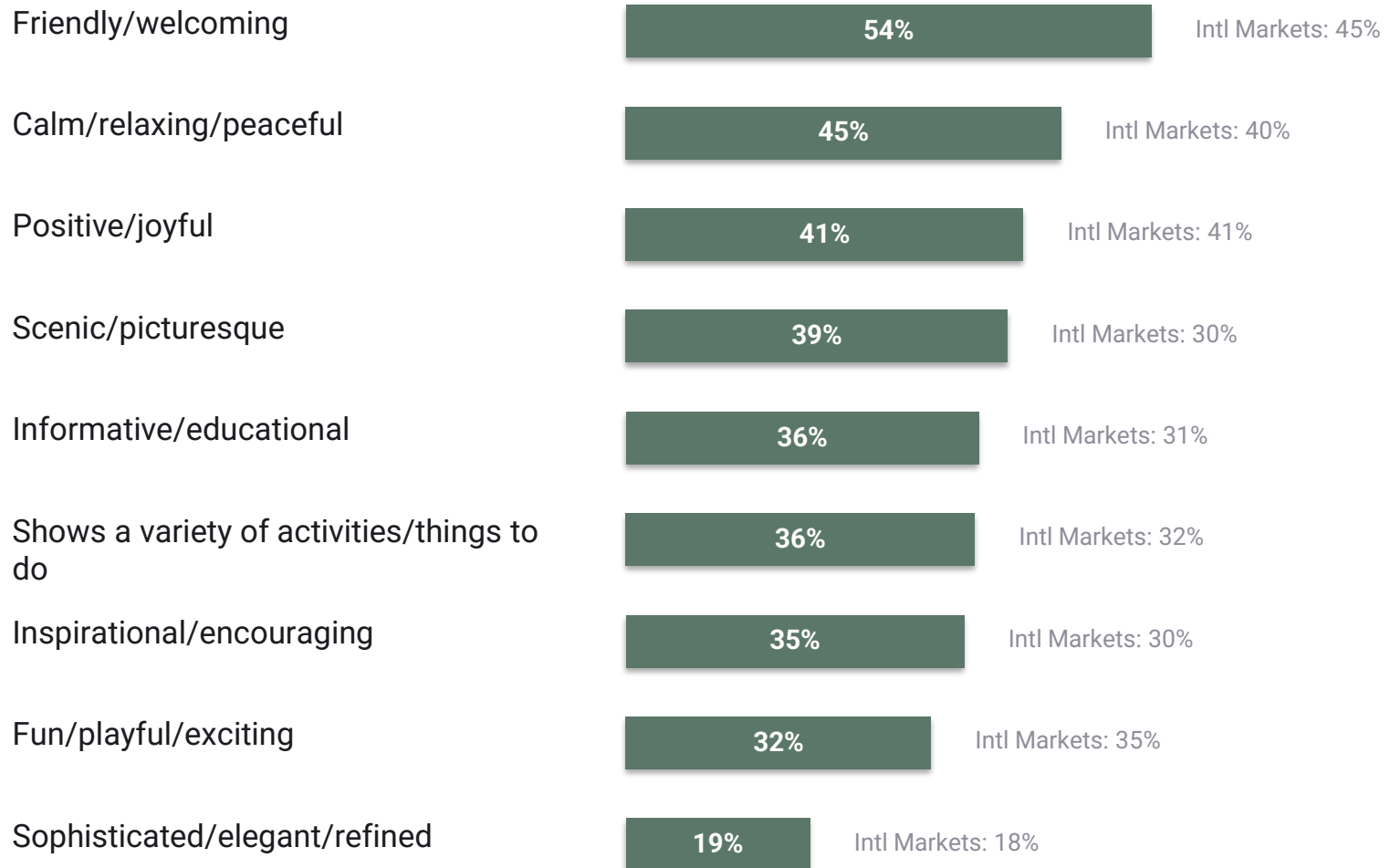
41%

Likely to Visit (5yr)

Intl Markets: 41%

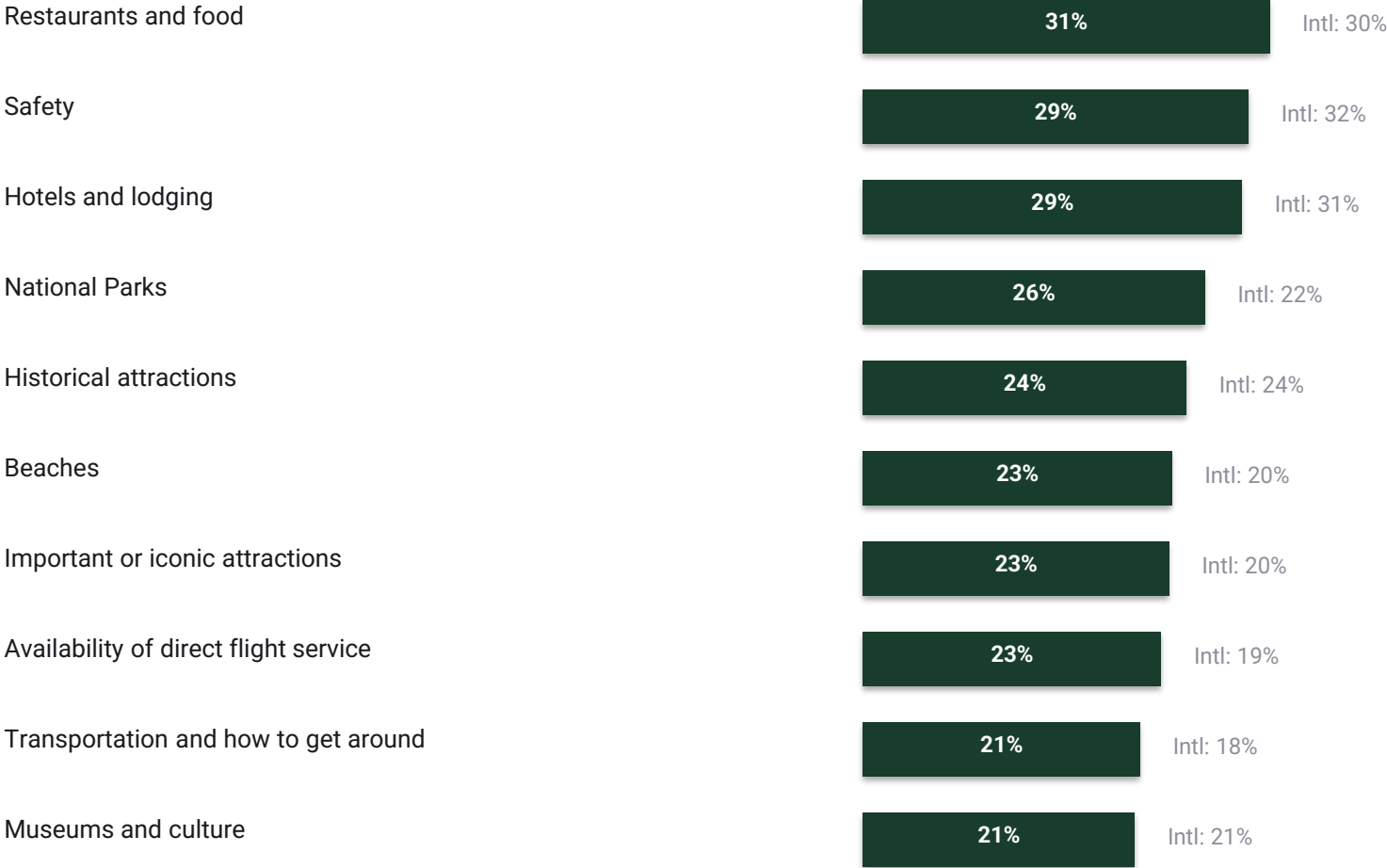
Desired Travel Promotion Tone

United Kingdom



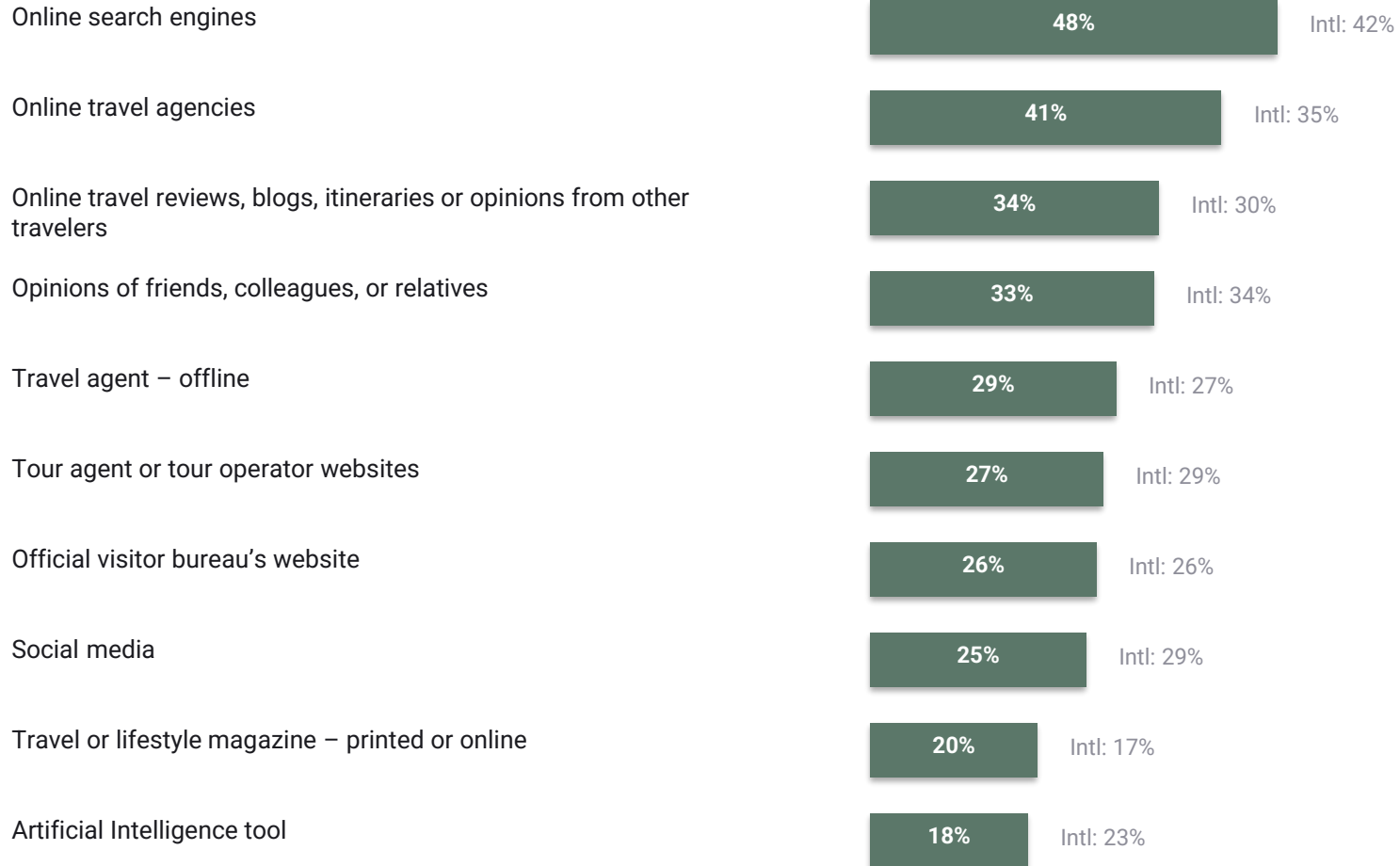
Top Information Sources

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

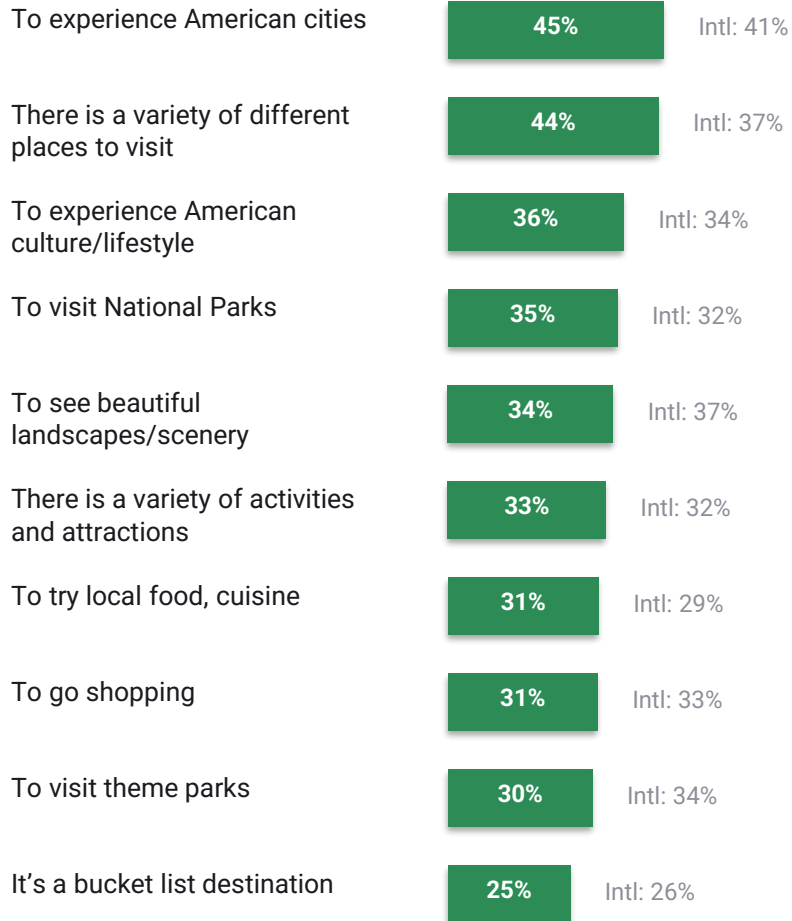
Total

Intl: \$5,049

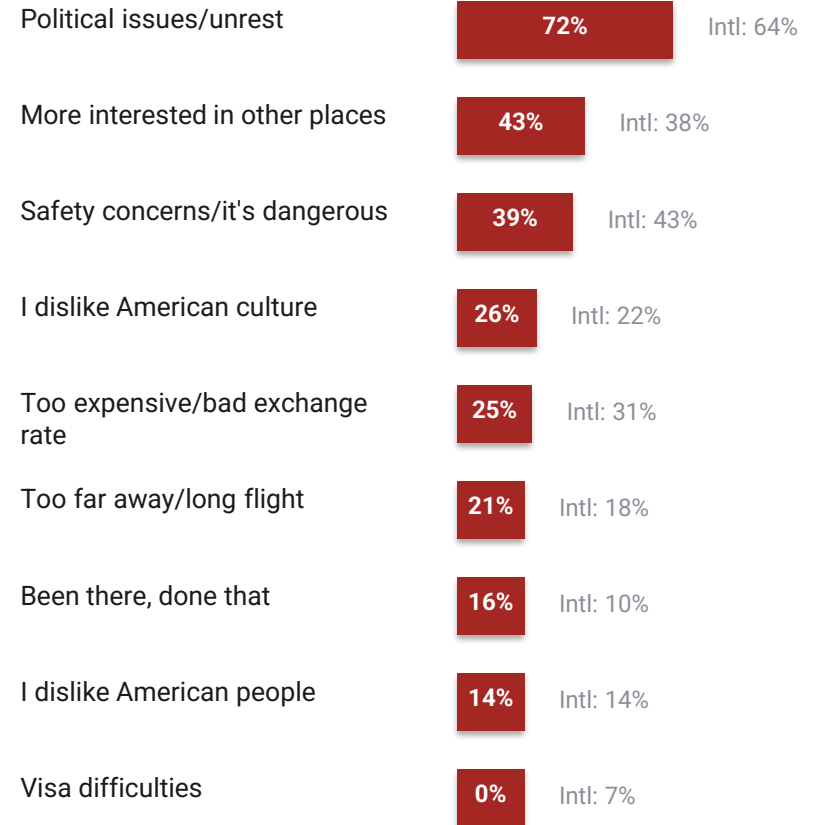
Enablers & Barriers to Visiting

United Kingdom

Enablers

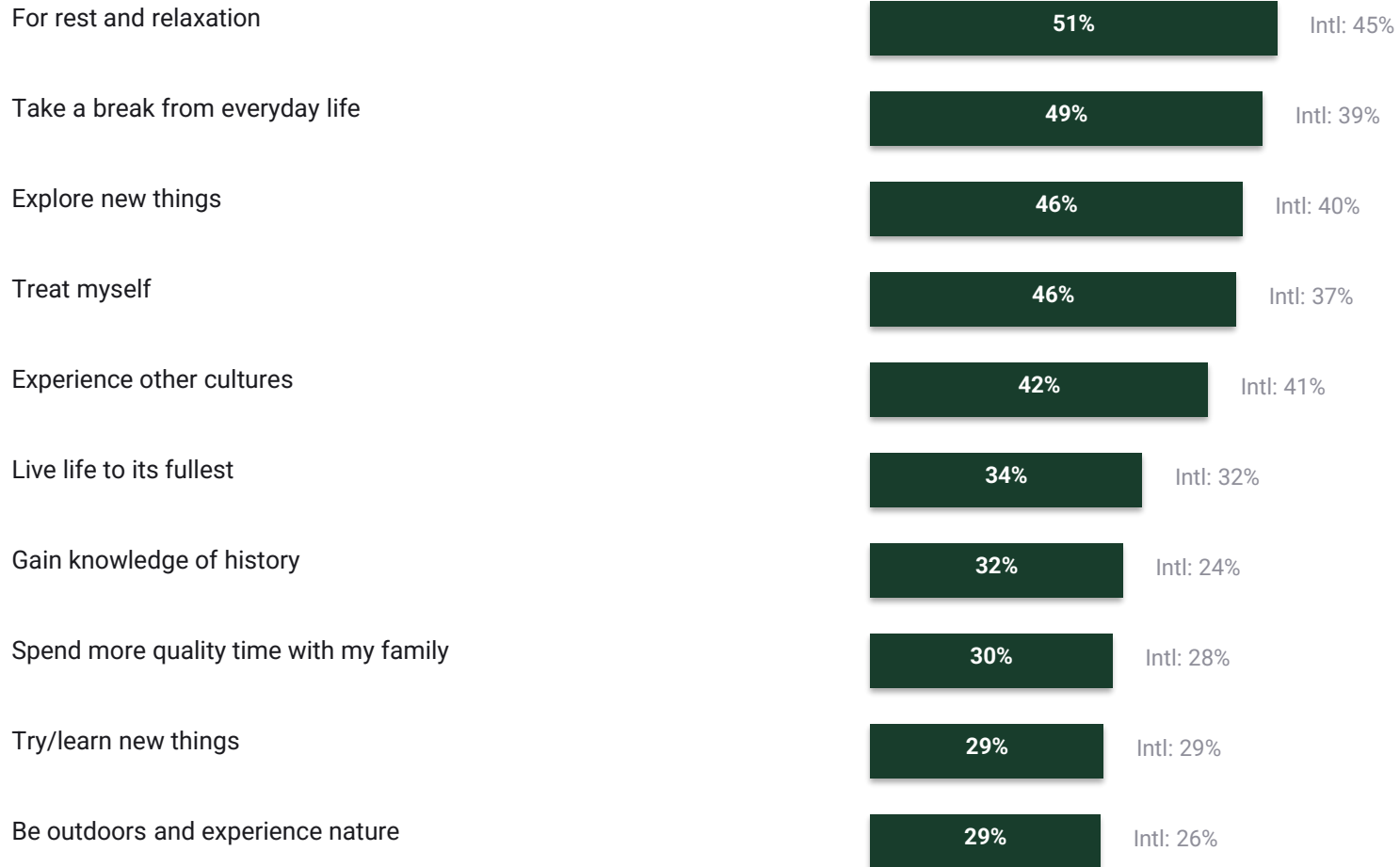


Barriers



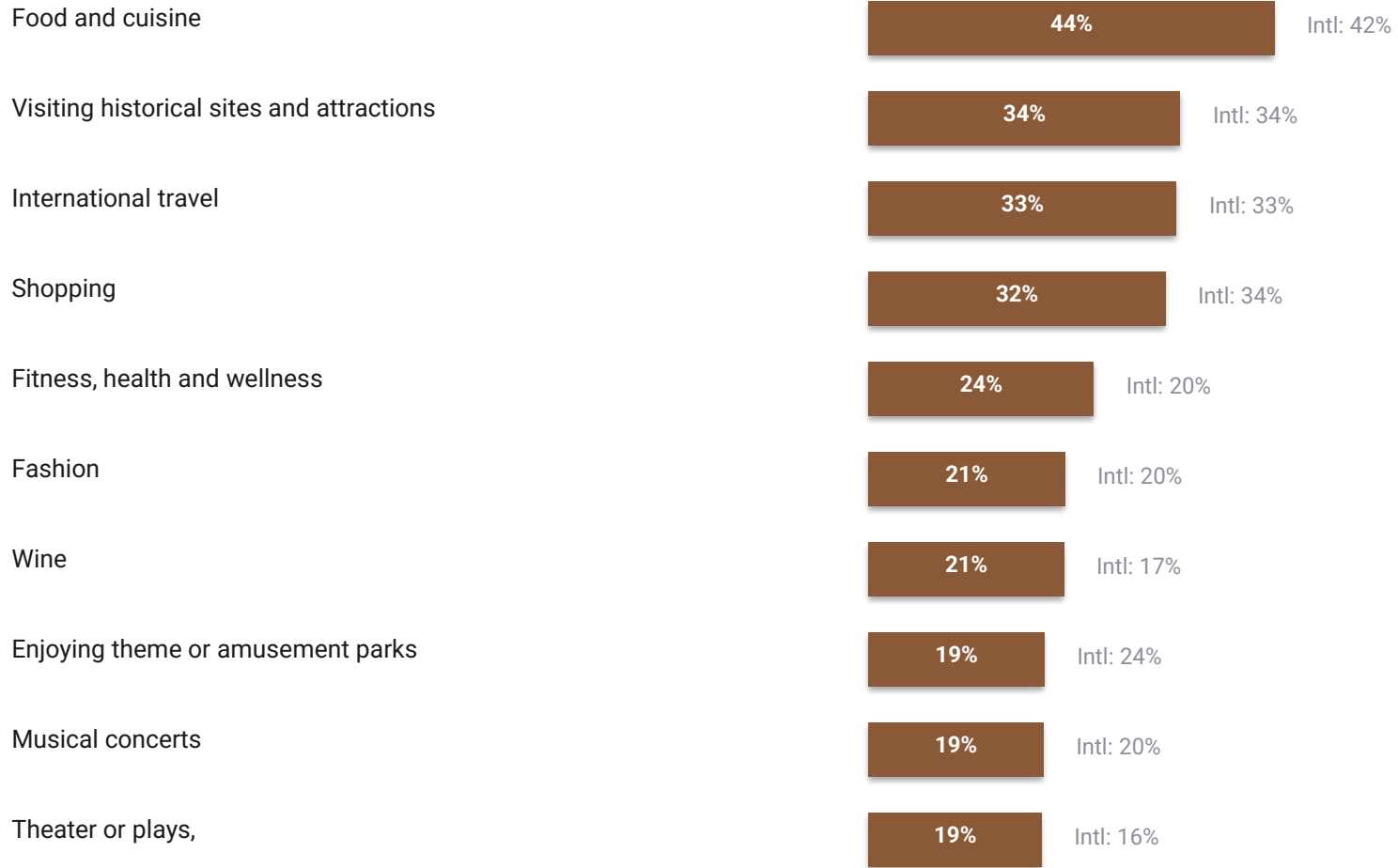
Travel Motivations

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

BRAZIL

Source Market Analysis | South Carolina

#4 by Spending | #9 by Visits

DISCOVER
South Carolina

TravelSouth
All Y'all Are Welcome USA

Brazil | Key Findings

- 1 2026 South Carolina projected spending:** \$25.6M (+6.2% YOY). Projected visitors: 8K (+2.6% YOY). Ranks #4 by spending and #9 by visits among South Carolina source markets.
- 2 Macro Context:** Brazil 2026 GDP growth projected at 1.9%. Exchange rate: 5.15 BRL/USD.
- 3 CAGR Comparison:** 2023-2027 projected spending CAGR (15.2%) exceeds 2015-2019 (-2.8%).
- 4 Visitor Perceptions:** 72% familiarity with the American South, 82% appeal, 49% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$4,812 for a 2-week trip. Average length of stay: 14.8 days. Average destinations: 5.3.
- 6 Top Motivation:** For rest and relaxation (54%)
- 7 Top Enabler:** To go shopping (54%)
- 8 Preferred Tone:** Positive/joyful (51%)
- 9 Top Barrier:** Political issues/unrest (70%)

Brazil

\$25.6M

2026 South Carolina Spending

+6.2% YOY vs. 2025

8K

2026 South Carolina Visitors

+2.6% YOY vs. 2025

\$8.4B

2026 USA Spending

+7.2% YOY vs. 2025

3M

2026 USA Visitors

+3.8% YOY vs. 2025

\$24.1M

2025 South Carolina Spending

+13.7% YOY vs. 2024

7.8K

2025 South Carolina Visitors

-1.3% YOY vs. 2024

\$7.9B

2025 USA Spending

+11.4% YOY vs. 2024

2.9M

2025 USA Visitors

0% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

-2.8%

Spending

-4.7%

Visits

2023-2027 PROJECTED CAGR

15.2%

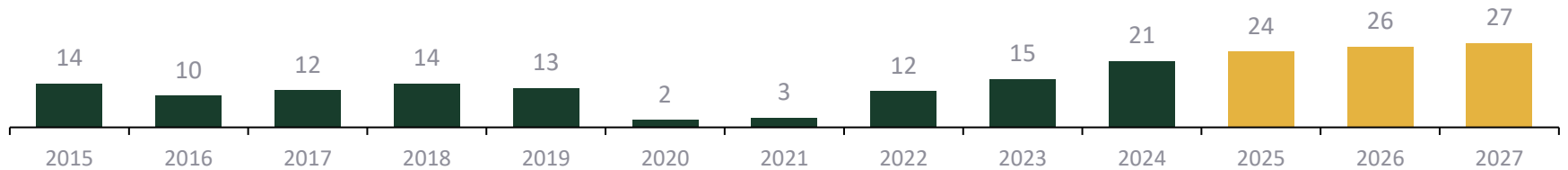
Spending

6.7%

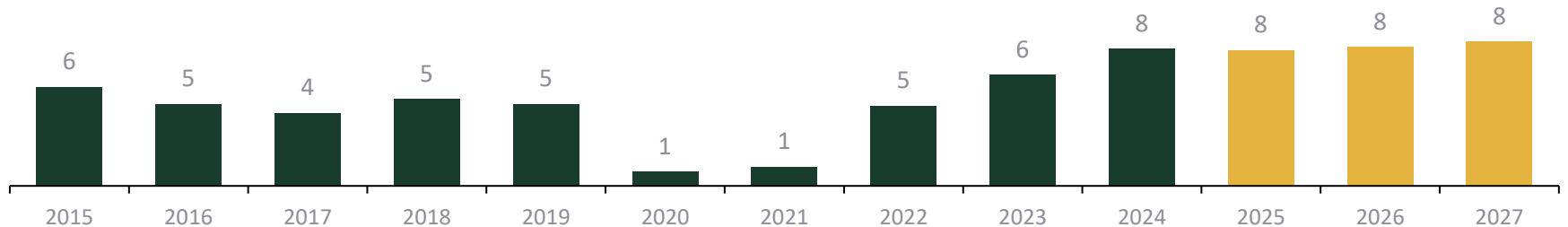
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

Brazil

72%

Familiarity

Intl Markets: 67%

82%

Appeal

Intl Markets: 75%

30%

Promotional Buzz

Intl Markets: 29%

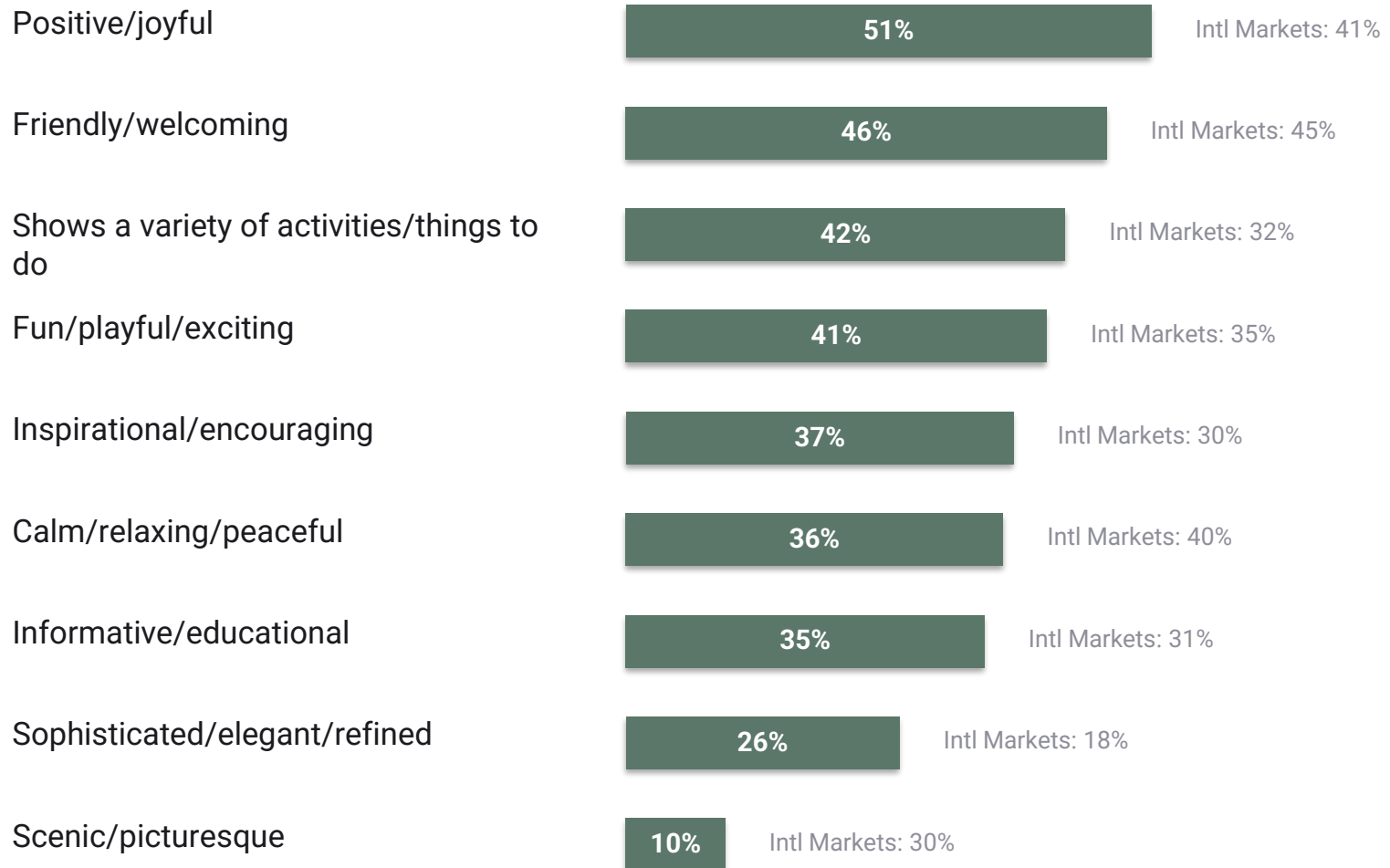
49%

Likely to Visit (5yr)

Intl Markets: 41%

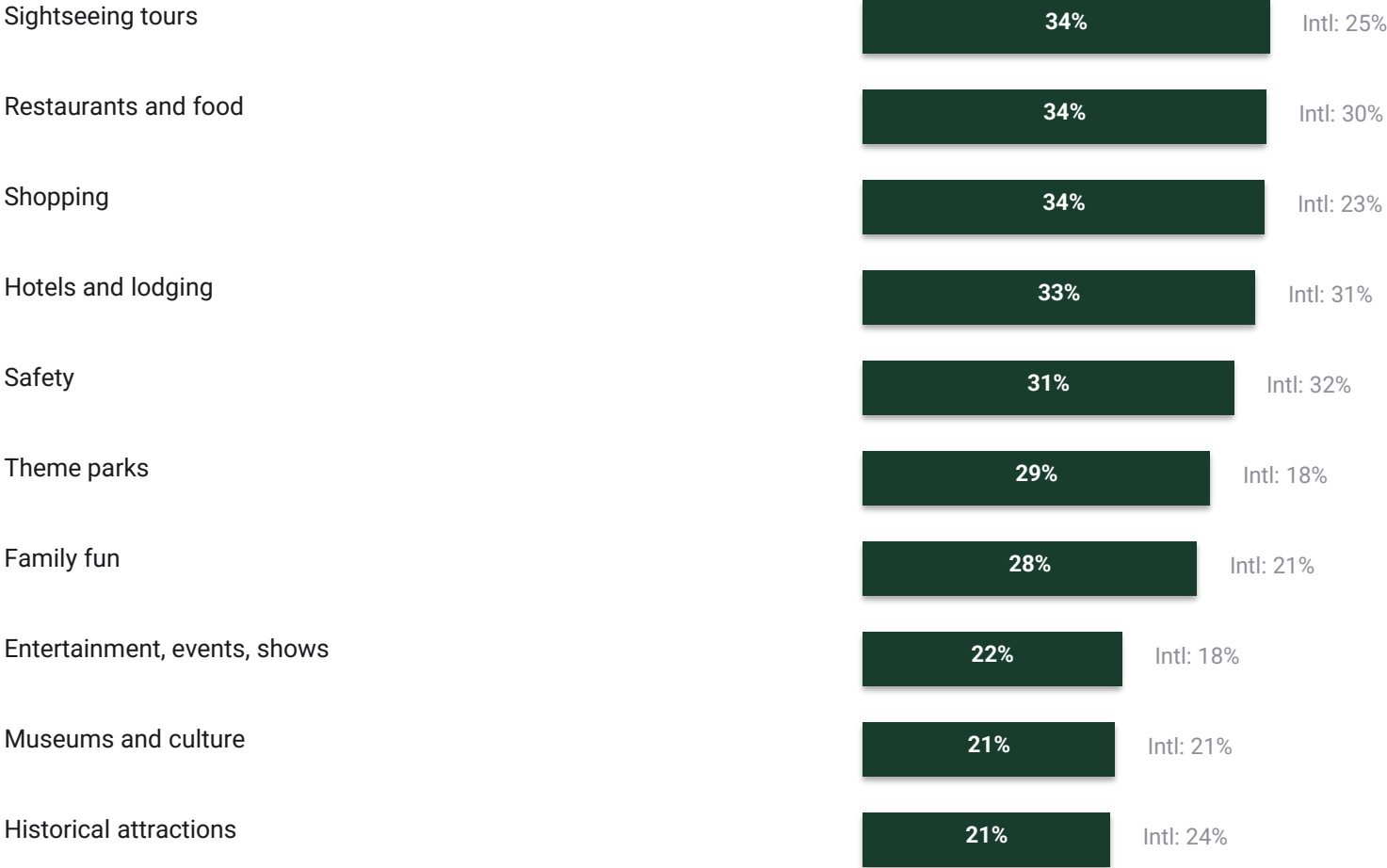
Desired Travel Promotion Tone

Brazil



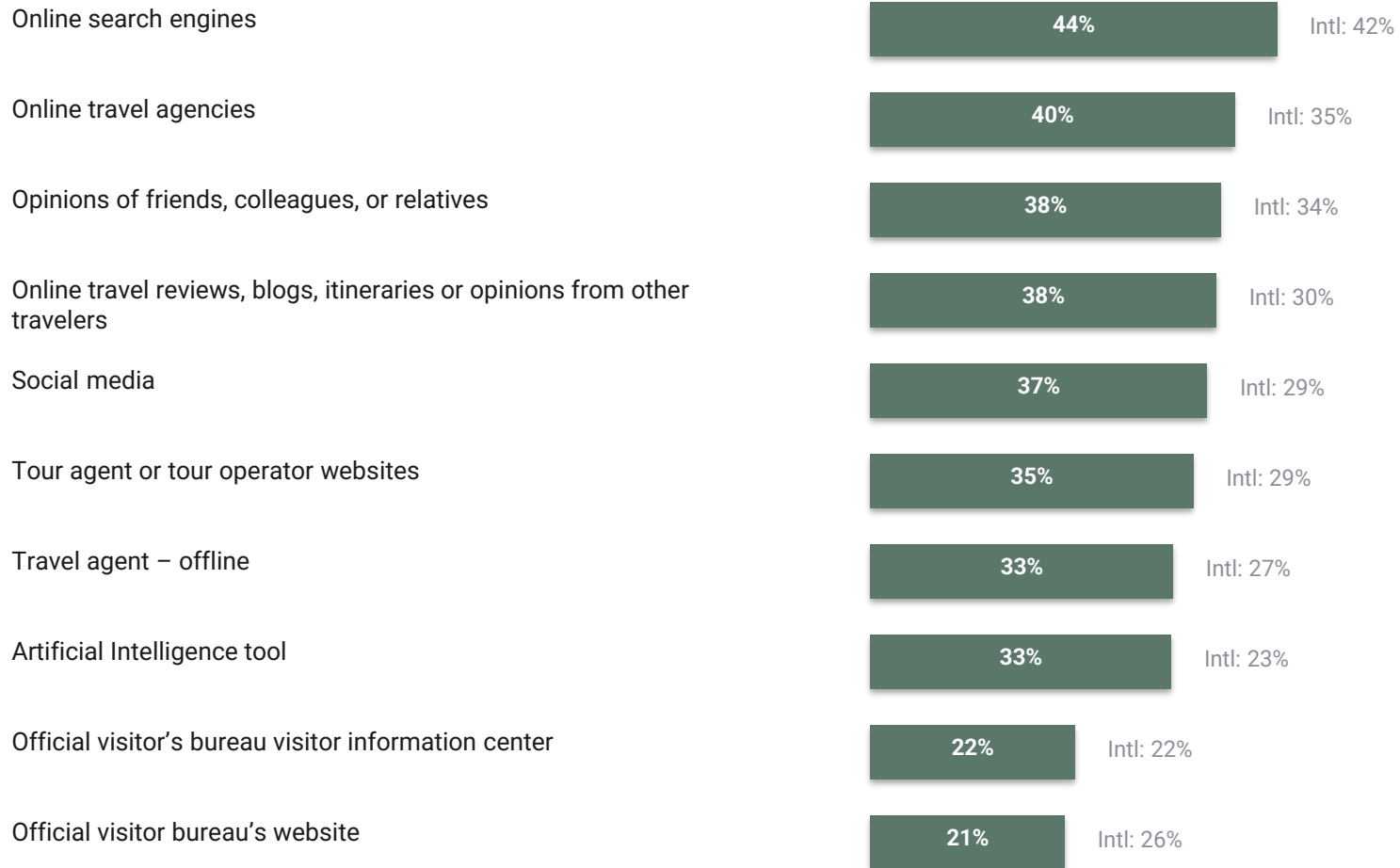
Top Information Sources

Brazil



Planning Resources

Brazil



U.S. Travel Planning & Budget

Brazil

U.S. Trip Planning

52%

Likely to Visit US (2yr)

Intl Markets: 36%

16 wks

Planning Window

Intl Markets: 14 wks

14 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

14.8

Avg Days in the U.S.

Intl Markets: 12.3

5.3

Avg Destinations in the U.S.

Intl Markets: 4.4

2.9

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,391

Hotels

Intl: \$1,568

\$1,127

Shopping

Intl: \$1,001

\$774

Dining

Intl: \$826

\$897

Sightseeing

Intl: \$881

\$623

Transport

Intl: \$772

\$4,812

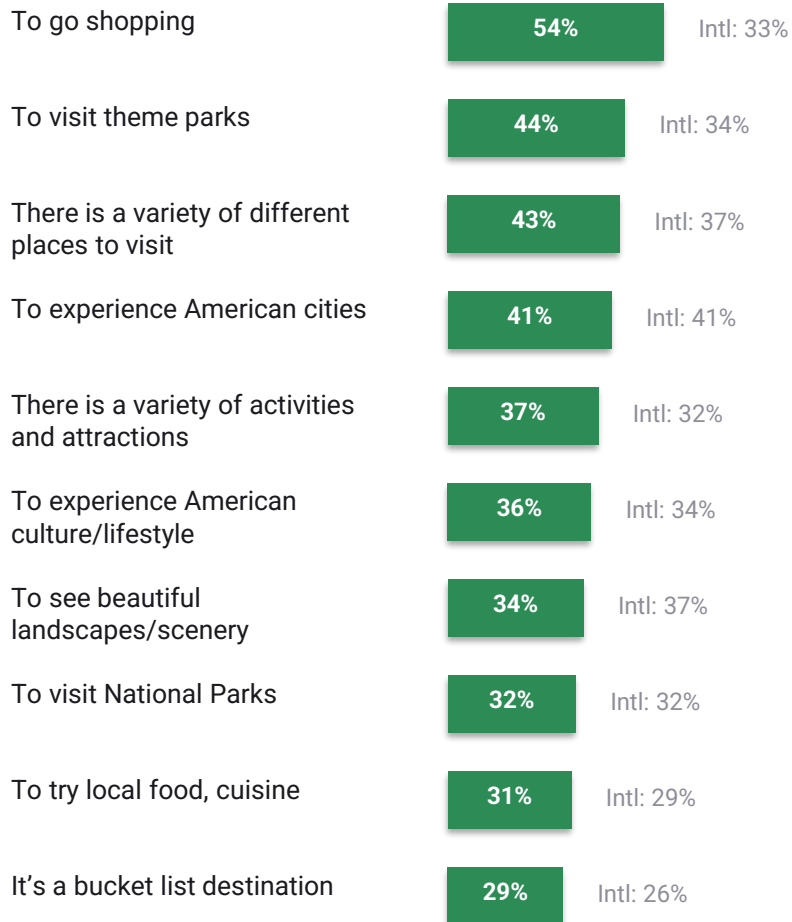
Total

Intl: \$5,049

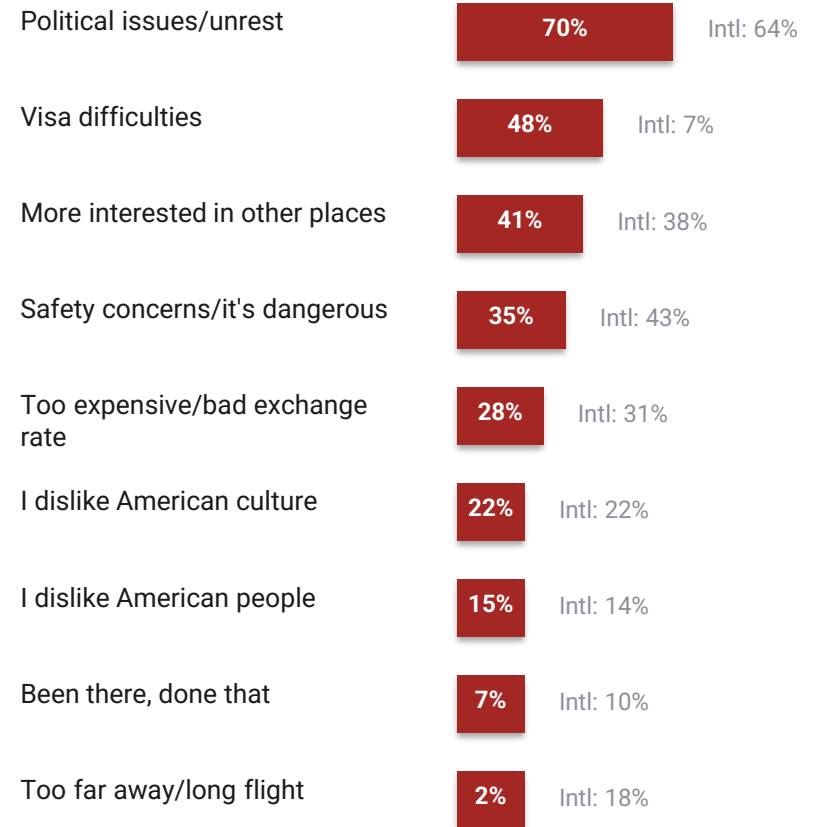
Enablers & Barriers to Visiting

Brazil

Enablers

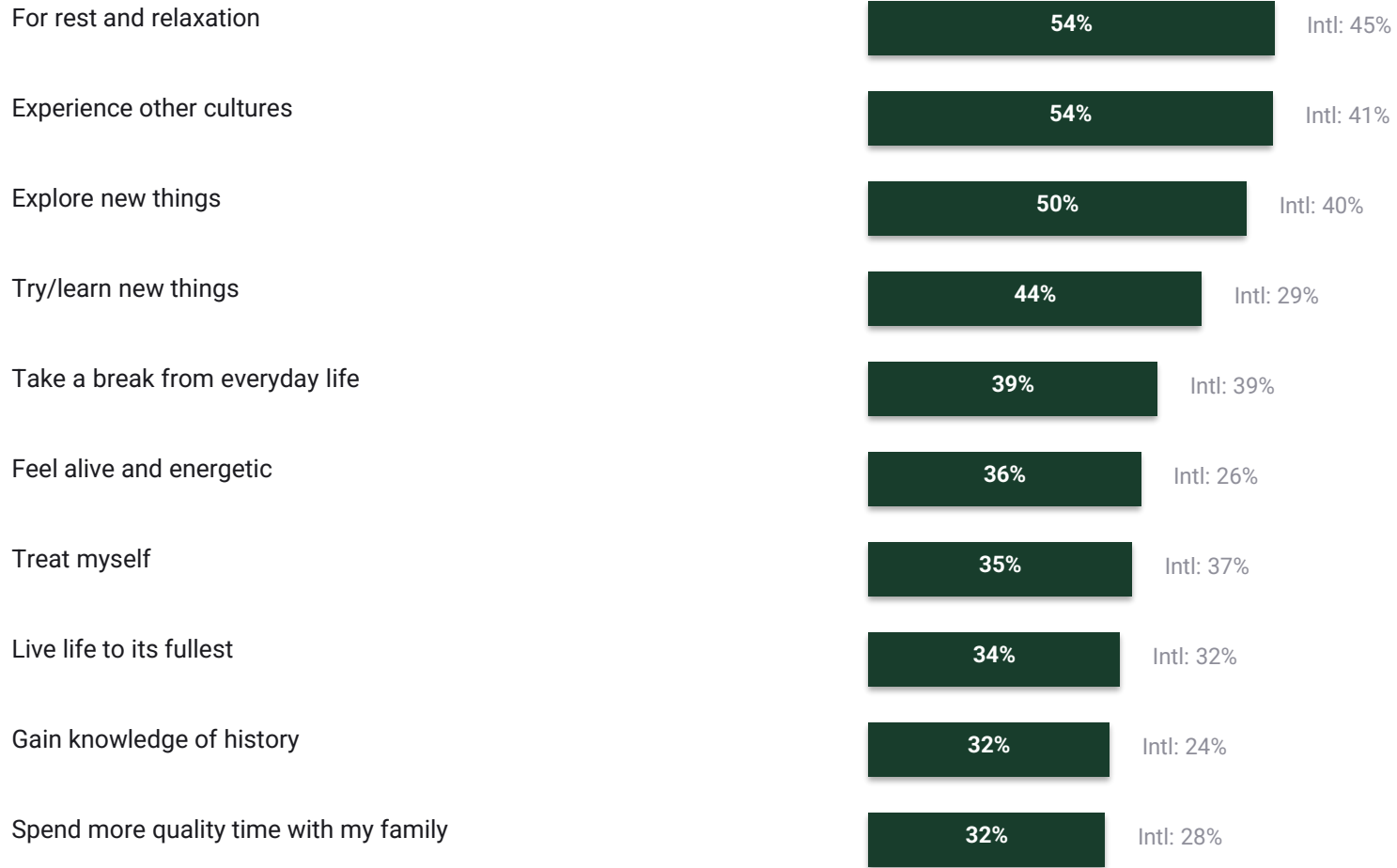


Barriers



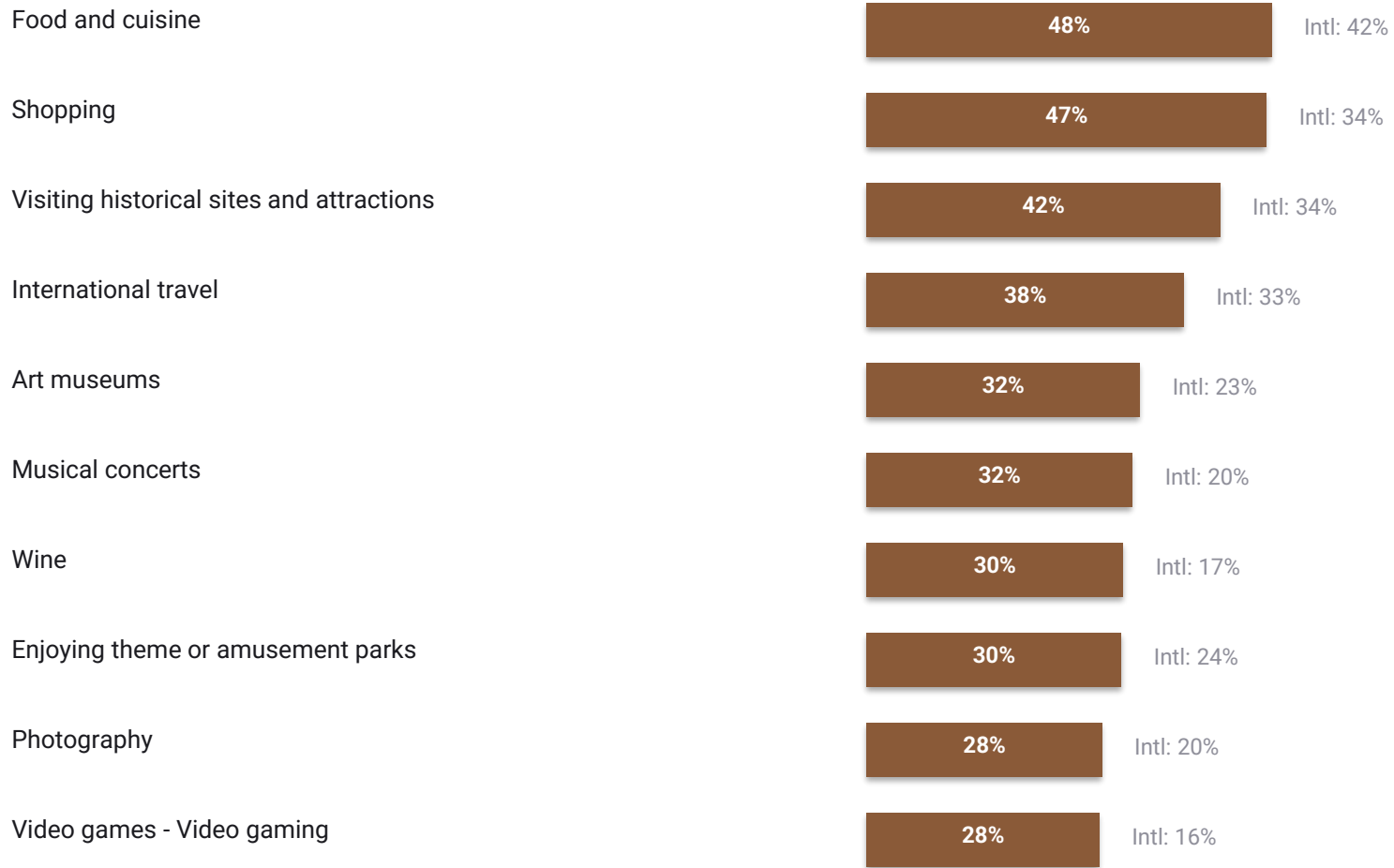
Travel Motivations

Brazil



Hobbies & Passions

Brazil



Travel Trends & Outlook

Brazil

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

66%

Intl: 42%

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

64%

Intl: 54%

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

59%

Intl: 53%

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

54%

Intl: 43%

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

54%

Intl: 42%

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

50%

Intl: 44%

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

44%

Intl: 39%

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

40%

Intl: 34%

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

33%

Intl: 27%

 Brazil

 Intl Markets

CHINA

Source Market Analysis | South Carolina

#5 by Spending | #8 by Visits

DISCOVER
South Carolina

TravelSouth
All Y'all Are Welcome USA

China | Key Findings

- 1 2026 South Carolina projected spending:** \$25.1M (+3.7% YOY). Projected visitors: 8.6K (+3.6% YOY). Ranks #5 by spending and #8 by visits among South 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 (26.4%) exceeds 2015-2019 (3.7%).
- 4 Visitor Perceptions:** 77% familiarity with the American South, 83% appeal, 54% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$8,672 for a 2-week trip. Average length of stay: 10.2 days. Average destinations: 3.0.
- 6 Top Motivation:** For rest and relaxation (37%)
- 7 Top Enabler:** To see beautiful landscapes/scenery (36%)
- 8 Preferred Tone:** Fun/playful/exciting (44%)
- 9 Top Barrier:** Political issues/unrest (61%)

China

\$25.1M

2026 South Carolina Spending

+3.7% YOY vs. 2025

8.6K

2026 South Carolina Visitors

+3.6% YOY vs. 2025

\$8.8B

2026 USA Spending

+4.8% YOY vs. 2025

2.8M

2026 USA Visitors

+4.8% YOY vs. 2025

\$24.2M

2025 South Carolina Spending

+5.7% YOY vs. 2024

8.3K

2025 South Carolina Visitors

-3.5% 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

3.7%

Spending

5.5%

Visits

2023-2027 PROJECTED CAGR

26.4%

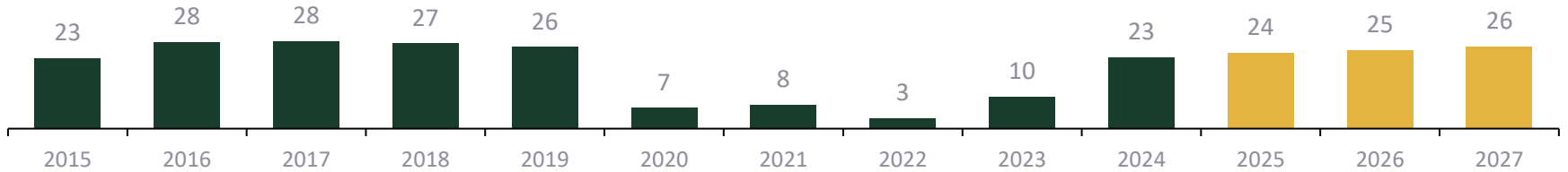
Spending

14.9%

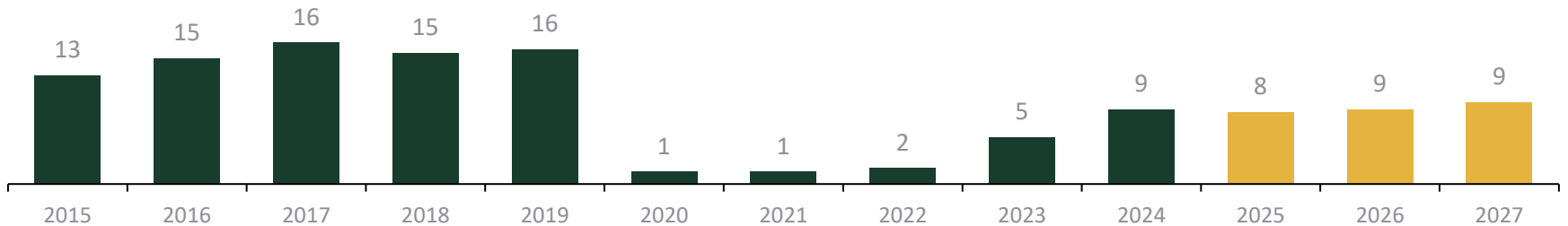
Visits

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%

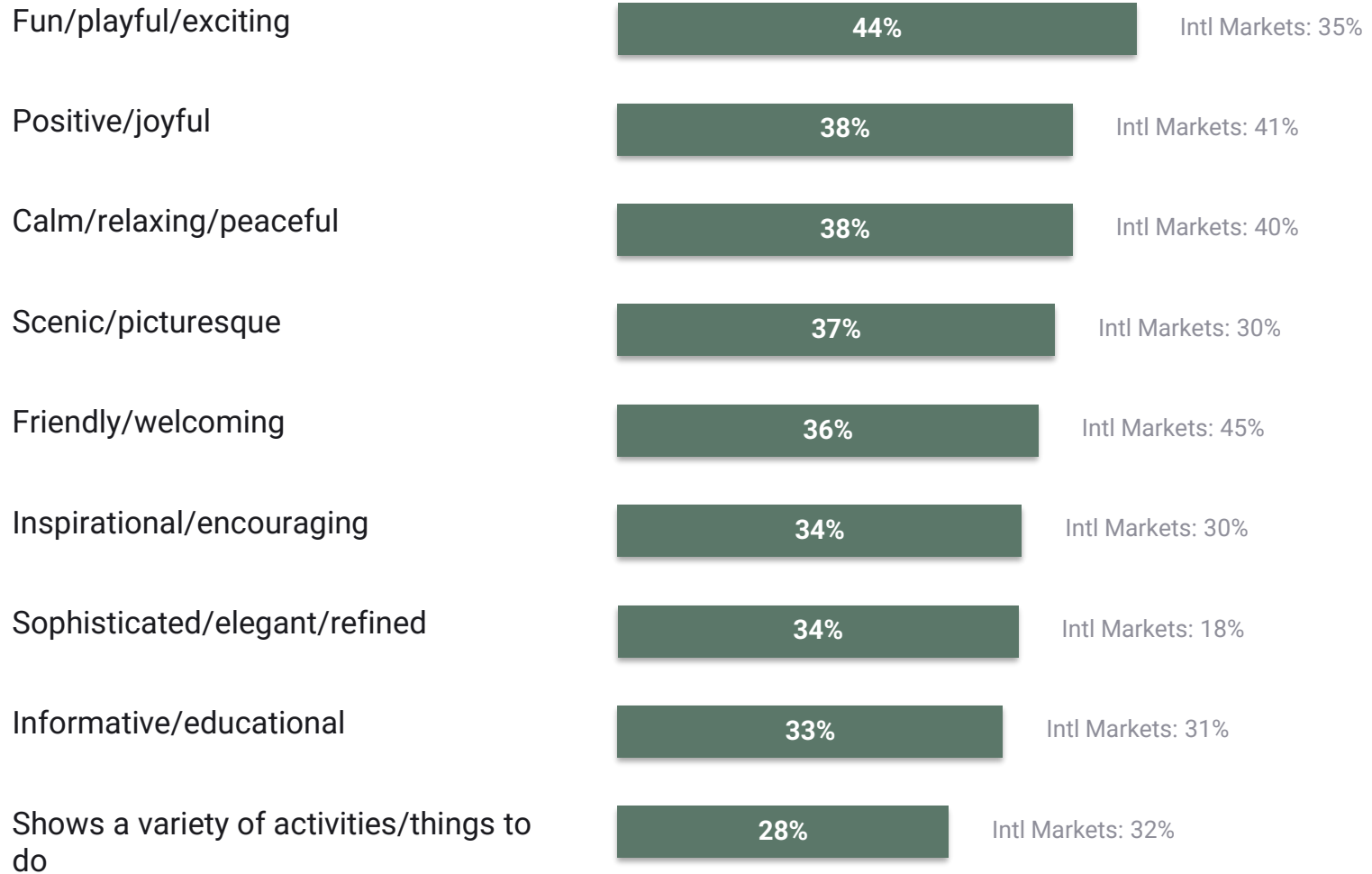
54%

Likely to Visit (5yr)

Intl Markets: 41%

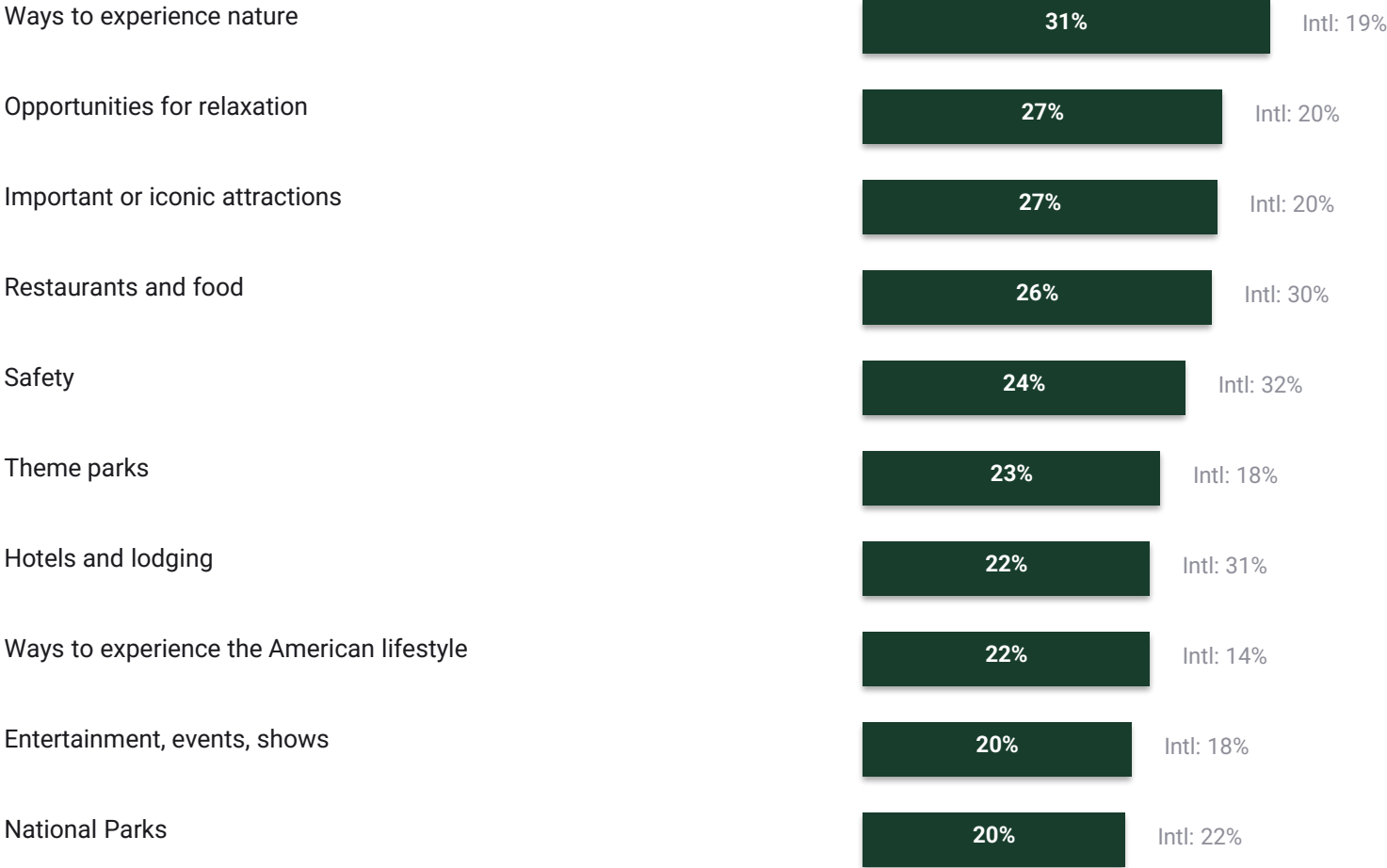
Desired Travel Promotion Tone

China



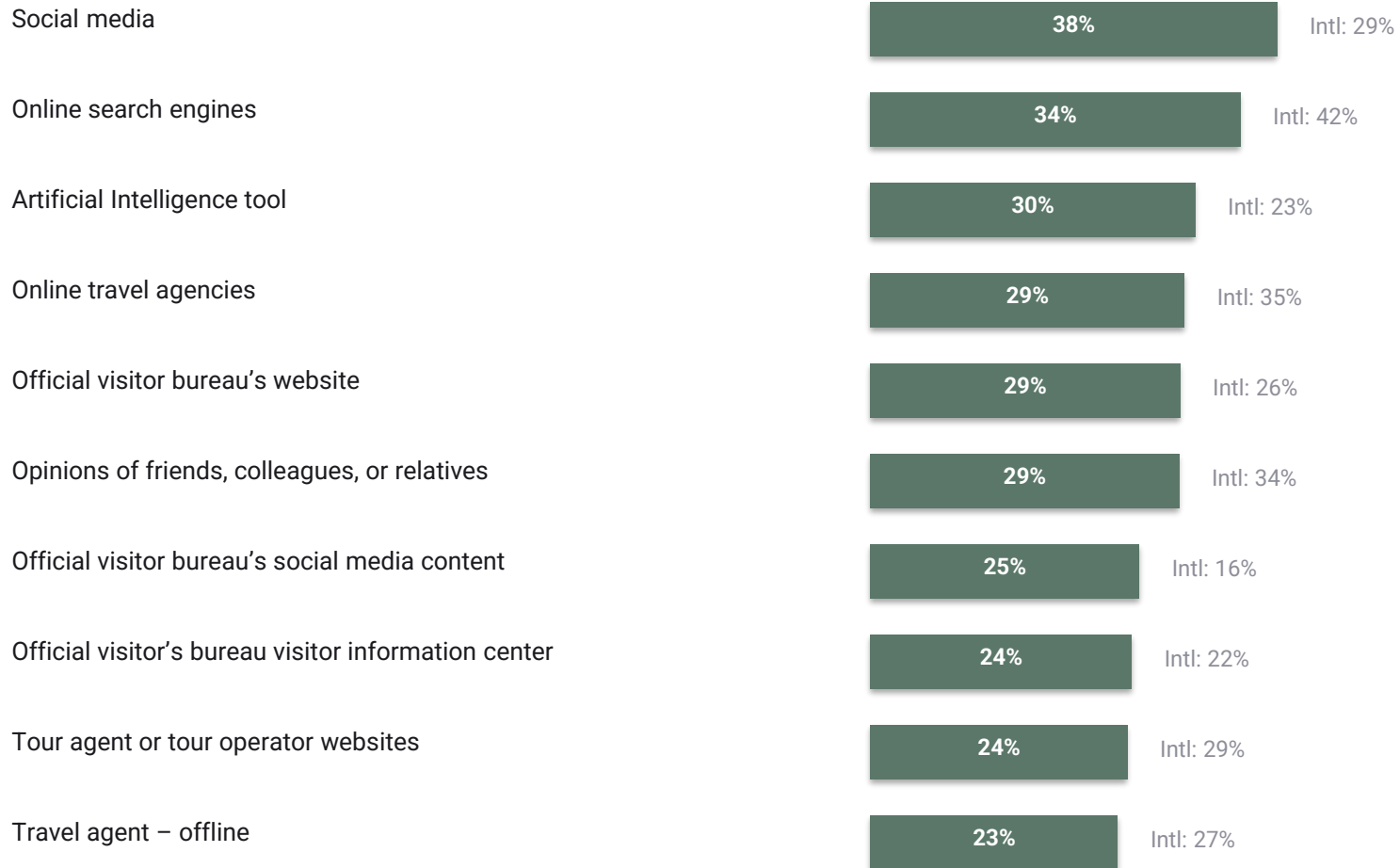
Top Information Sources

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

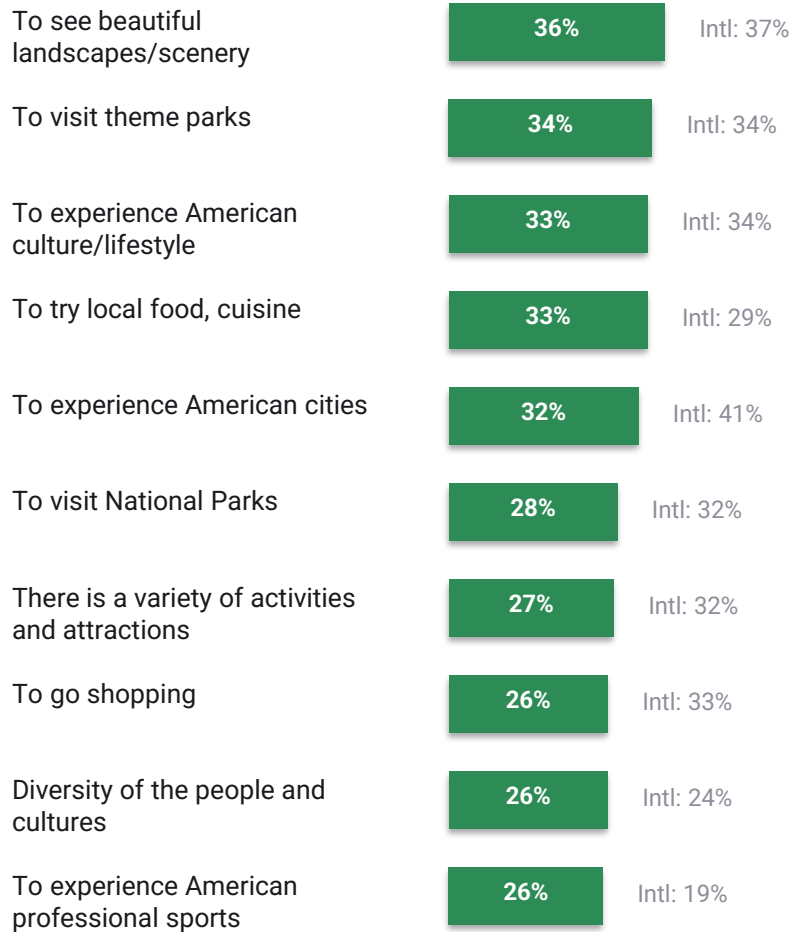
Total

Intl: \$5,049

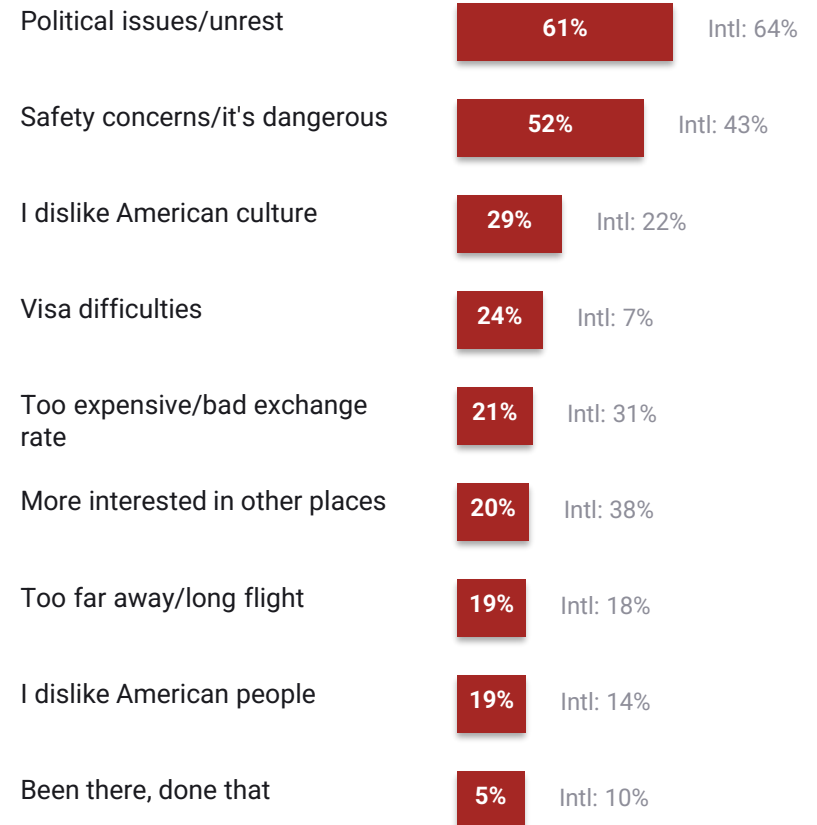
Enablers & Barriers to Visiting

China

Enablers

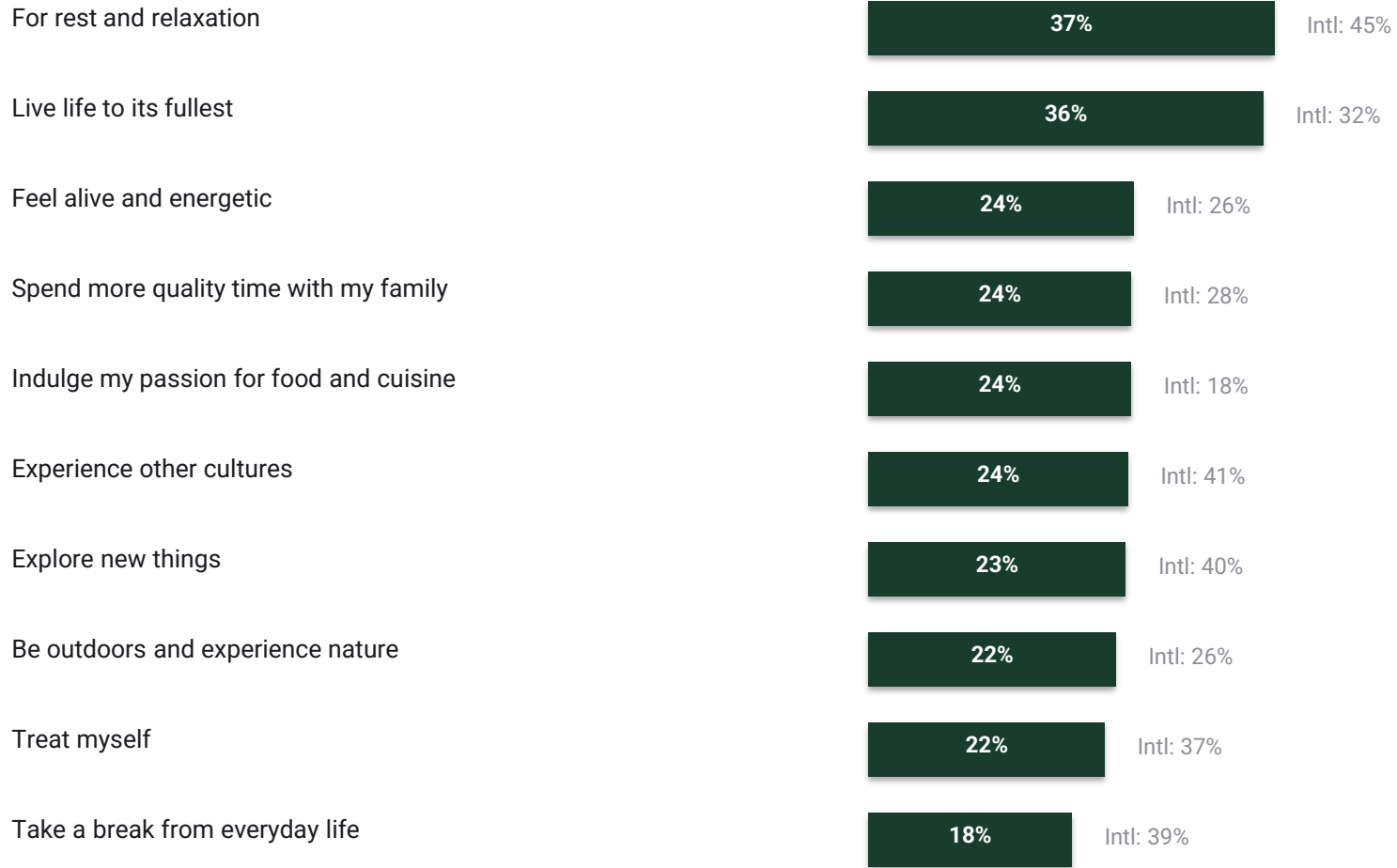


Barriers



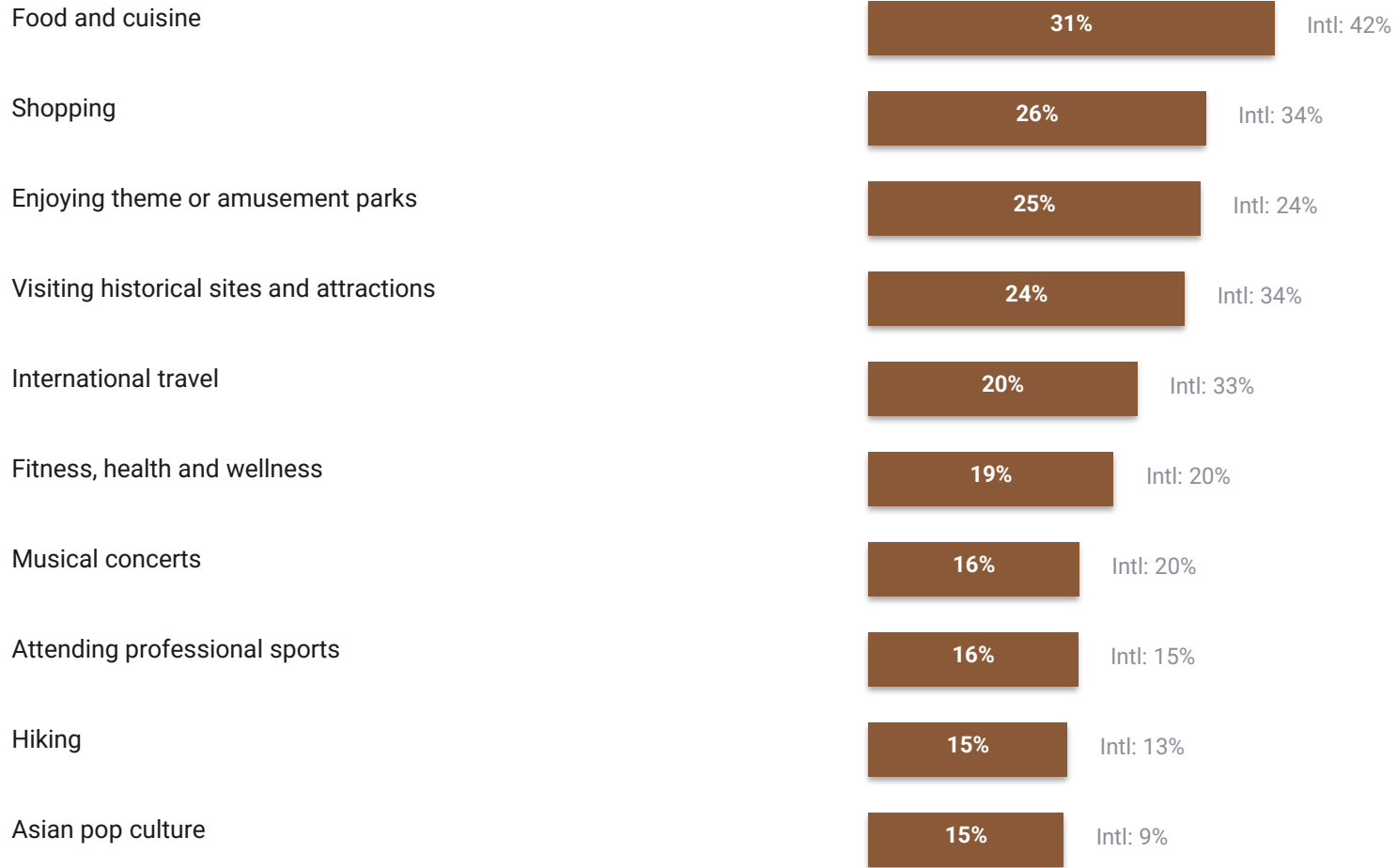
Travel Motivations

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.

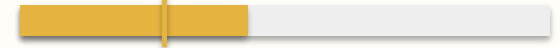
47%



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.