

TENNESSEE

SOUNDS PERFECT

International Visitor Profile

Key Findings

- 1 2026 projected spending:** \$946.9M (+5.7% YOY). Projected visitors: 651.9K (+3.9% YOY).
- 2 Top 10 Source Markets by Spending:** UK + Ireland (\$140.8M), Canada (\$119.2M), DACH Region (\$76.0M), Australia (\$60.6M), Brazil (\$45.3M), China (\$40.6M), India (\$37.4M), Japan (\$30.2M), Benelux (\$28.2M), Italy (\$24.8M).
- 3 Top 5 Growth Markets (Spending YOY):** Taiwan (+17.9%), Bulgaria (+16.9%), Singapore (+15.7%), Spain (+13.1%), Israel (+13.1%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-9.1%).
- 5** UK + Ireland leads by spending (\$140.8M). Canada leads by visits (220.4K).
- 6 CAGR:** 2023-2027 projected spending CAGR (7.1%) exceeds 2015-2019 (6.8%).
- 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%)

Tennessee

\$946.9M

2026 Projected Spending

+5.7% YOY vs. 2025

\$815.4M

2026 Overseas Spending

+5.6% YOY vs. 2025

\$895.9M

2025 Projected Spending

-1.5% YOY vs. 2024

\$772.4M

2025 Overseas Spending

+2.3% YOY vs. 2024

651.9K

2026 Projected Visitors

+3.9% YOY vs. 2025

397.3K

2026 Overseas Visitors

+3.5% YOY vs. 2025

627.5K

2025 Projected Visitors

-9.3% YOY vs. 2024

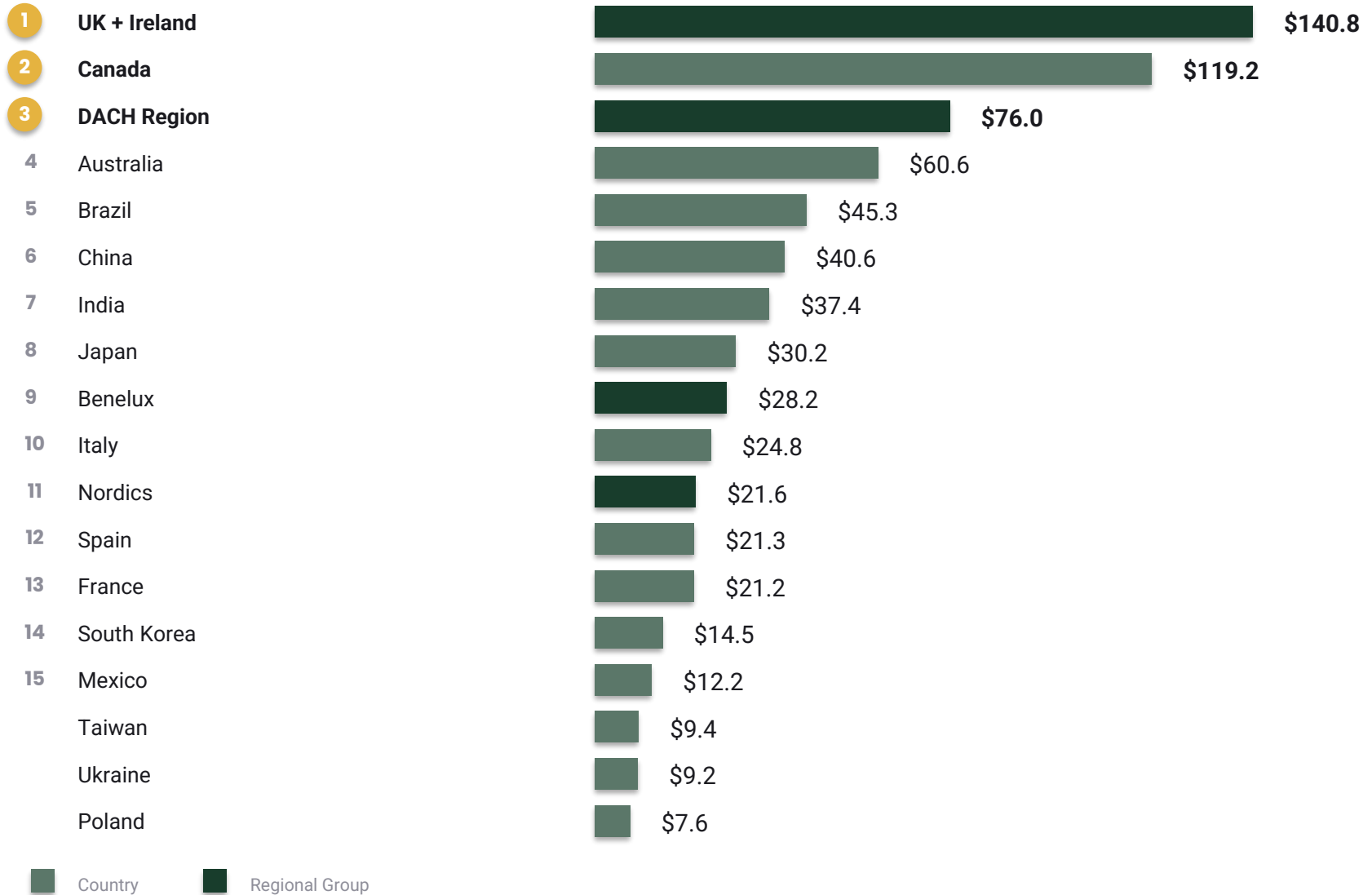
383.9K

2025 Overseas Visitors

-2.8% YOY vs. 2024

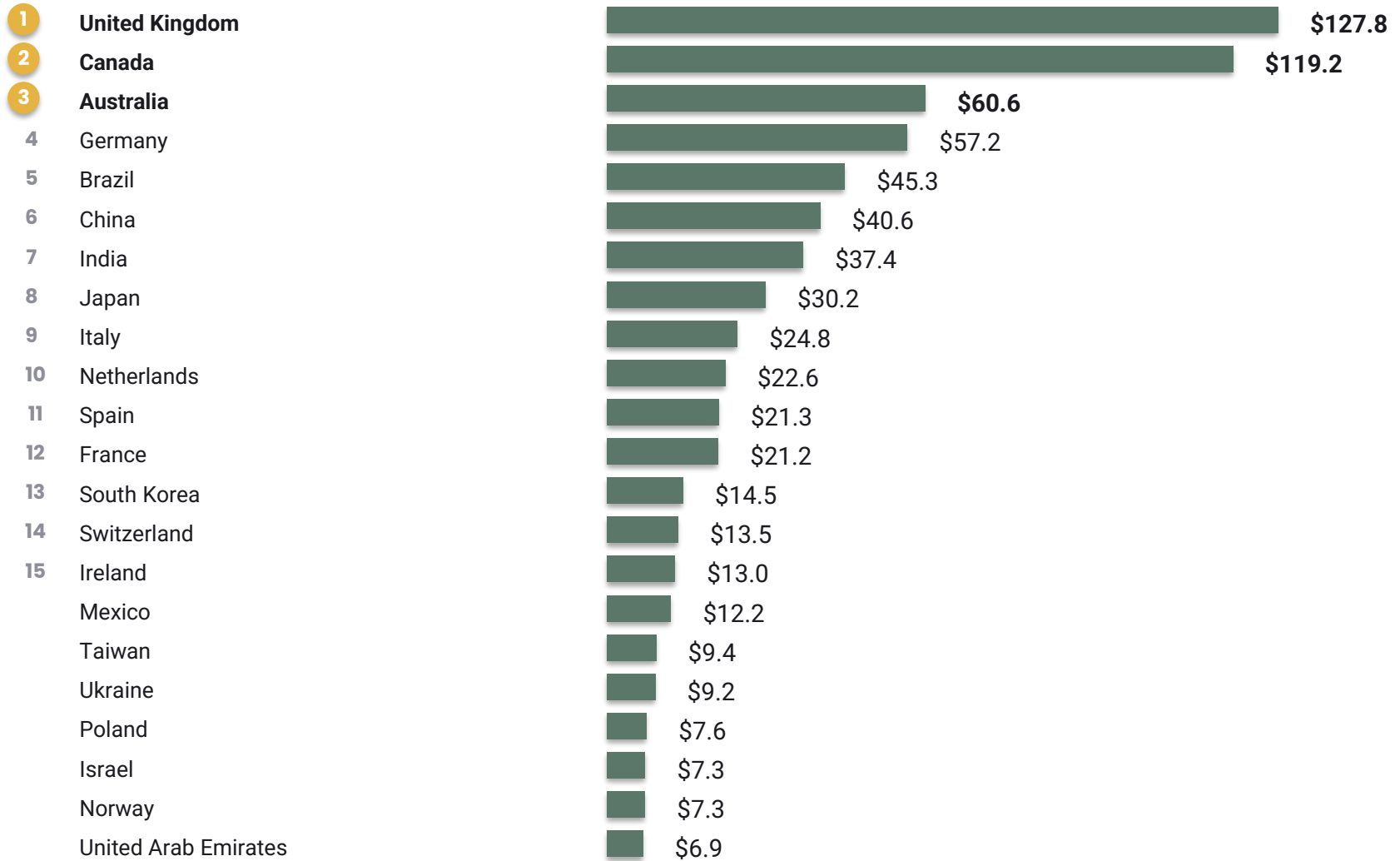
Top Source Markets | 2026 Projections

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



Top Source Markets | 2026 Projections | Detailed

Spending (\$ millions) by individual country



Top Markets Detail | 2026 Projections

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

#	Market	Spending (\$M)	Visits (K)	Spend Δ%	Visits Δ%
1	United Kingdom	\$127.8	66.1	+0.9%	+2.3%
2	Canada	\$119.2	220.4	+6.4%	+4.8%
3	Australia	\$60.6	22.5	+6.4%	+4.1%
4	Germany	\$57.2	27.4	+8.7%	+4.4%
5	Brazil	\$45.3	13.8	+5.6%	+2.0%
6	China	\$40.6	12.0	+4.8%	+4.2%
7	India	\$37.4	21.5	+5.8%	+1.1%
8	Japan	\$30.2	19.6	+7.0%	+7.7%
9	Italy	\$24.8	14.7	+6.8%	+4.4%
10	Netherlands	\$22.6	12.6	+8.9%	+5.8%
11	Spain	\$21.3	12.2	+13.1%	+5.3%
12	France	\$21.2	14.5	+3.5%	+1.4%
13	South Korea	\$14.5	10.6	+4.4%	+5.1%
14	Switzerland	\$13.5	5.9	+12.8%	+7.4%
15	Ireland	\$13.0	7.6	+6.0%	+4.7%
16	Mexico	\$12.2	34.2	+6.7%	+2.6%
17	Taiwan	\$9.4	4.2	+17.9%	+8.6%
18	Ukraine	\$9.2	1.1	+8.6%	+3.4%
19	Poland	\$7.6	4.5	+3.7%	-0.9%
20	Israel	\$7.3	5.8	+13.1%	+1.6%
21	Norway	\$7.3	3.8	+14.1%	+14.8%
22	United Arab Emirates	\$6.9	1.7	+4.8%	+10.8%

% Change | 2025 Projections vs. 2024

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

#	Market	Spending %Δ	Visits %Δ
1	United Kingdom	+14.9%	+2.0%
2	Canada	-22.1%	-21.1%
3	Australia	-14.3%	-5.4%
4	Germany	+6.1%	-11.3%
5	Brazil	+14.0%	-0.2%
6	China	+4.1%	-4.5%
7	India	-5.6%	-4.9%
8	Japan	+10.8%	+5.0%
9	Italy	+12.1%	+4.5%
10	Netherlands	+11.2%	-8.5%
11	Spain	+11.8%	+0.9%
12	France	-2.4%	-6.1%
13	South Korea	-14.2%	-3.7%
14	Switzerland	-23.2%	-11.2%
15	Ireland	-1.7%	+1.4%
16	Mexico	+4.6%	+8.6%
17	Taiwan	+30.8%	+6.7%
18	Ukraine	+35.0%	+7.3%
19	Poland	-3.2%	+4.6%
20	Israel	-7.8%	+13.1%
21	Norway	-9.7%	-7.2%
22	United Arab Emirates	+3.6%	-4.1%

 Decline  Growth

Growth Trajectory

2015-2019 CAGR

6.8%

Spending

6.1%

Visits

2023-2027 PROJECTED CAGR

7.1%

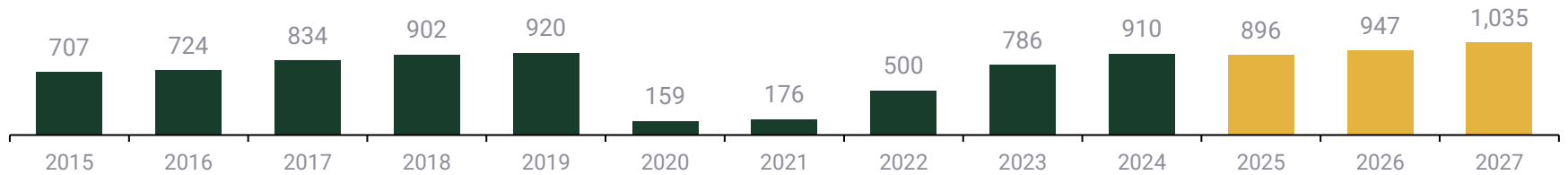
Spending

1.8%

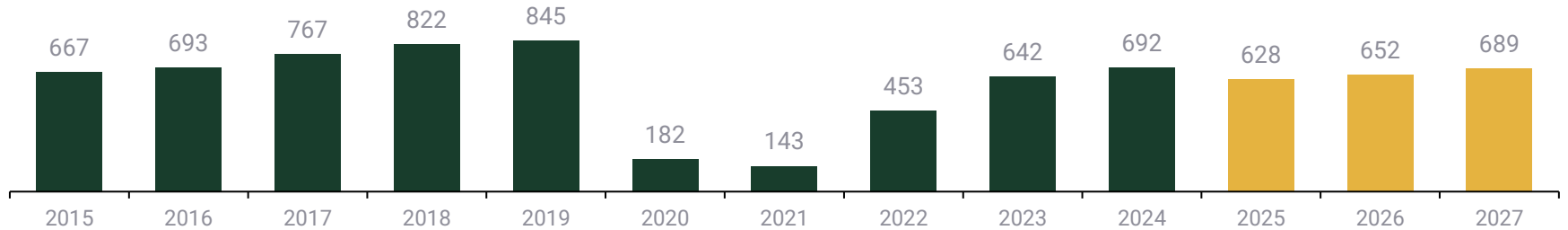
Visits

CAGR is Compound Annual Growth Rate.

Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Macro Context

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

United Kingdom

1.3%

GDP % Change

1.35

GBP/USD

Canada

1.5%

GDP % Change

1.37

CAD/USD

Australia

2.1%

GDP % Change

0.71

AUD/USD

Germany

0.9%

GDP % Change

1.18

EUR/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

Italy

0.8%

GDP % Change

1.18

EUR/USD

Netherlands

1.2%

GDP % Change

1.18

EUR/USD

Visitor Perceptions | The American South

International Markets

67%

Familiarity

75%

Appeal

29%

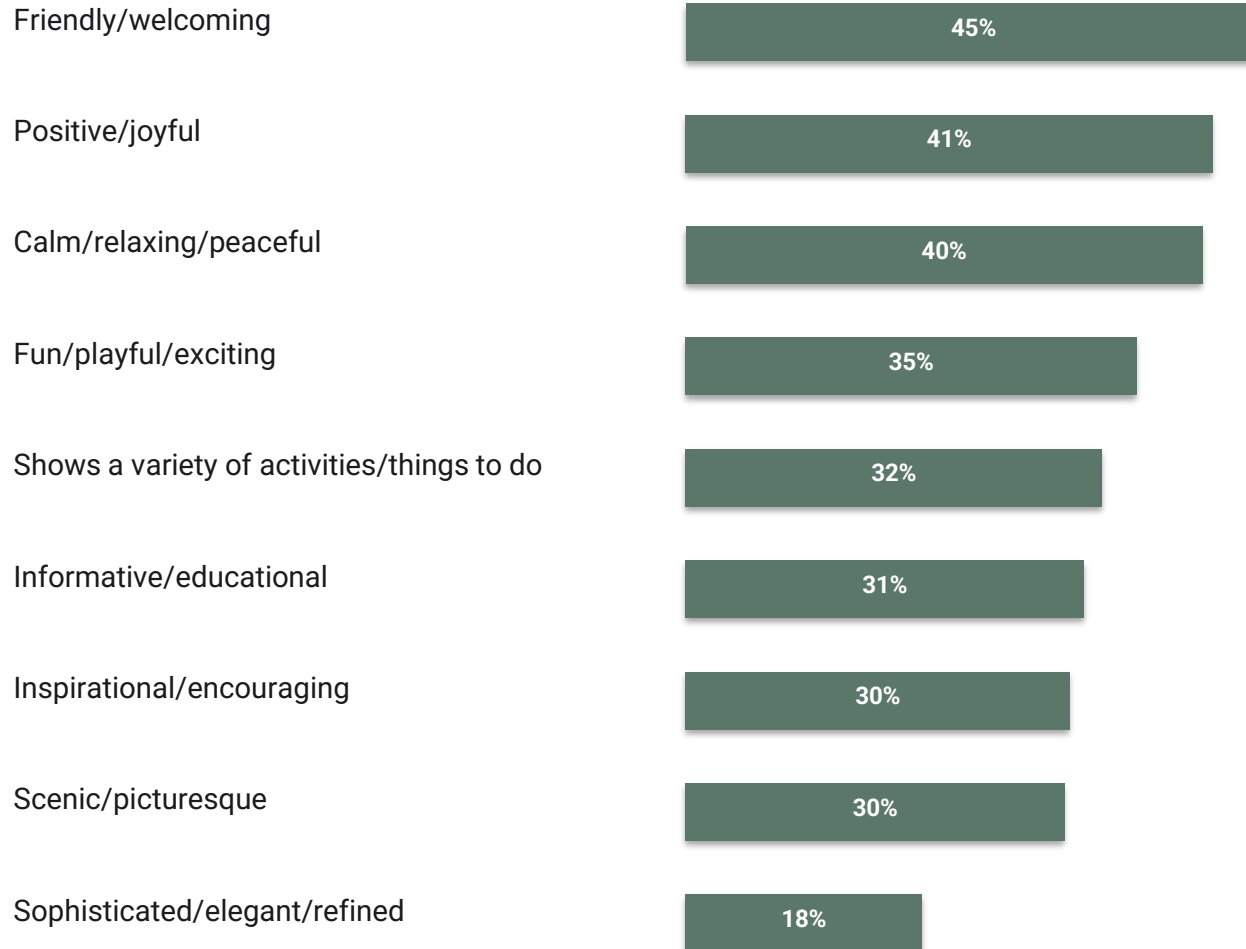
Promotional Buzz

41%

Likely to Visit (5yr)

Desired Travel Promotion Tone

International Markets



U.S. Travel Planning & Budget

Total international

U.S. Trip Planning

36%

Likely to Visit US (2yr)

Intl Markets: 36%

14 wks

Planning Window

Intl Markets: 14 wks

12 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

12.3

Avg Days in the U.S.

Intl Markets: 12.3

4.4

Avg Destinations in the U.S.

Intl Markets: 4.4

2.6

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,568

Hotels

Intl: \$1,568

\$1,001

Shopping

Intl: \$1,001

\$826

Dining

Intl: \$826

\$881

Sightseeing

Intl: \$881

\$772

Transport

Intl: \$772

\$5,049

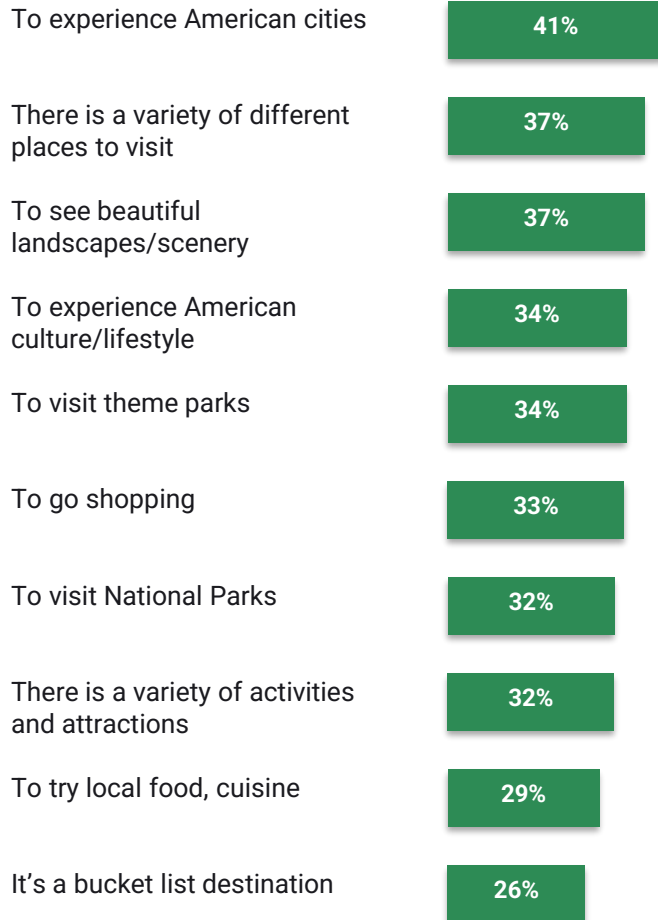
Total

Intl: \$5,049

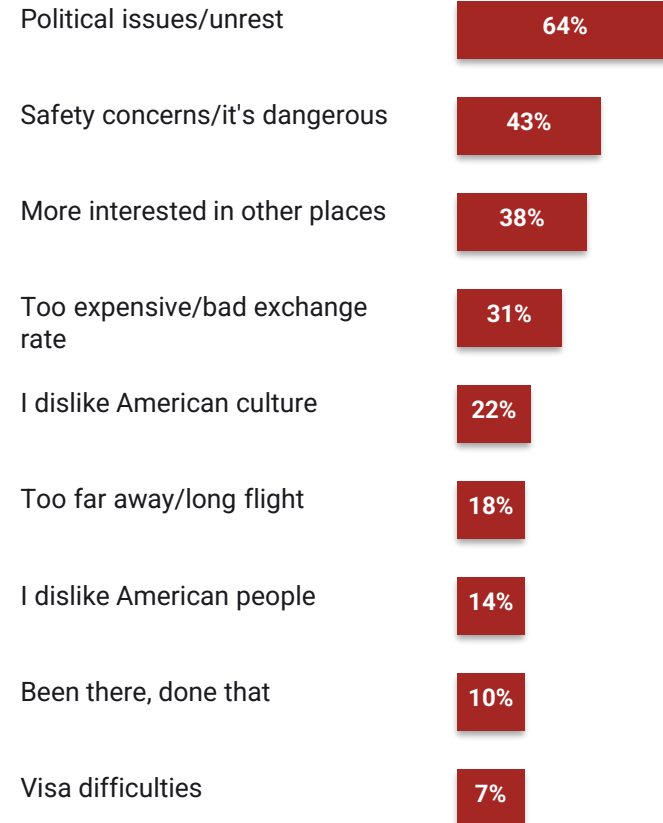
Enablers & Barriers to Visiting

International Markets

Enablers

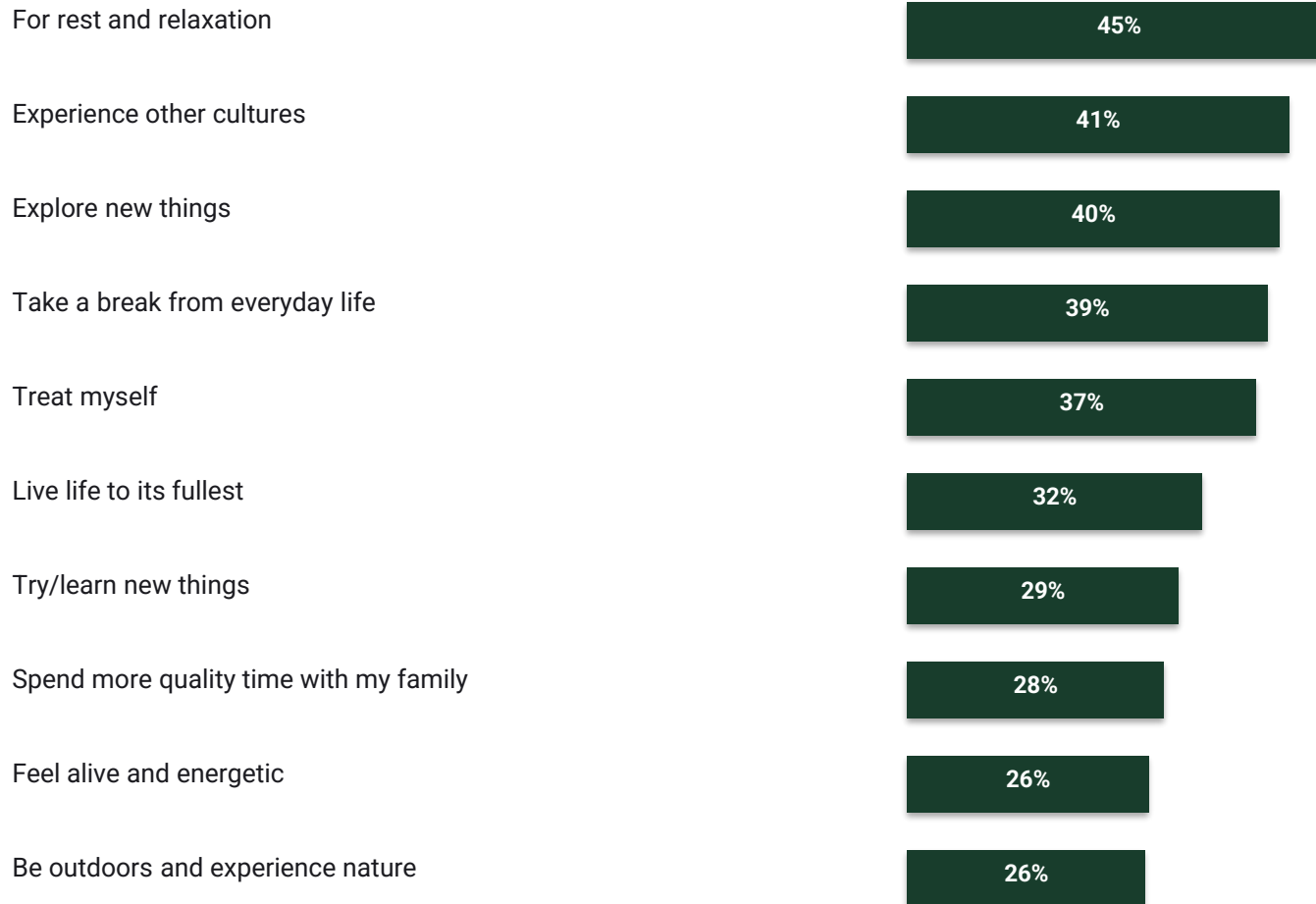


Barriers



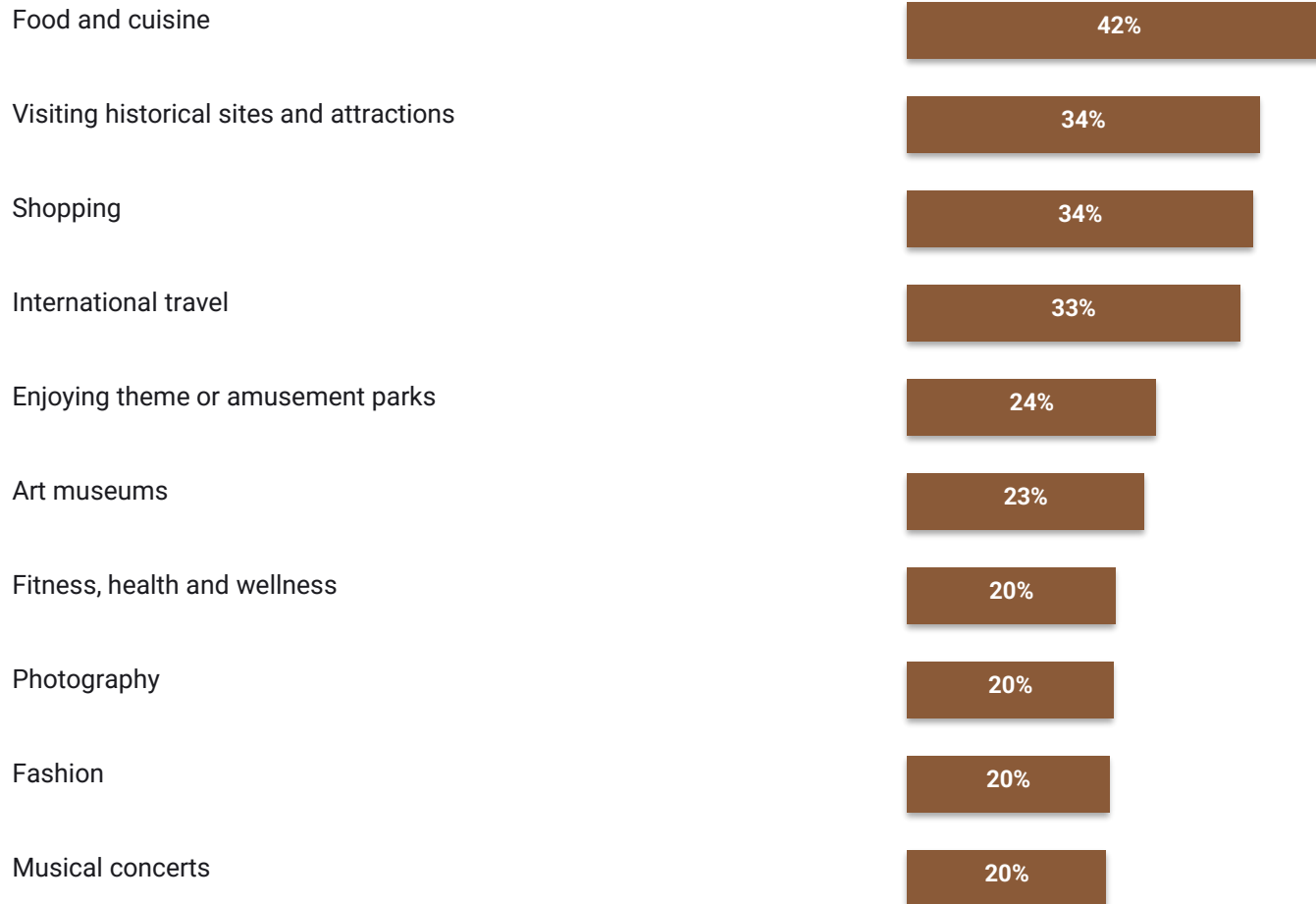
Travel Motivations

International Markets



Hobbies & Passions

International Markets



Travel Trends & Outlook

International Markets

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

54%



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

53%



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

44%



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

43%



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

42%



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

42%



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

39%



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

34%



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

27%



Top Five Markets by Spending

International Visitor Economy & Profiles by Country

UNITED KINGDOM

Source Market Analysis | Tennessee

#1 by Spending | #2 by Visits

TENNESSEE
SOUNDS PERFECT

TravelSouth
All Y'all Are Welcome USA

United Kingdom | Key Findings

- 1 2026 Tennessee projected spending:** \$127.8M (+0.9% YOY). Projected visitors: 66.1K (+2.3% YOY). Ranks #1 by spending and #2 by visits among Tennessee 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 (8.1%) trails 2015-2019 (10.8%).
- 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

\$127.8M

2026 Tennessee Spending

+0.9% YOY vs. 2025

66.1K

2026 Tennessee Visitors

+2.3% YOY vs. 2025

\$11.9B

2026 USA Spending

+3.3% YOY vs. 2025

5.8M

2026 USA Visitors

+3.5% YOY vs. 2025

\$126.7M

2025 Tennessee Spending

+14.9% YOY vs. 2024

64.6K

2025 Tennessee Visitors

+1.9% 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

10.8%

Spending

9%

Visits

2023-2027 PROJECTED CAGR

8.1%

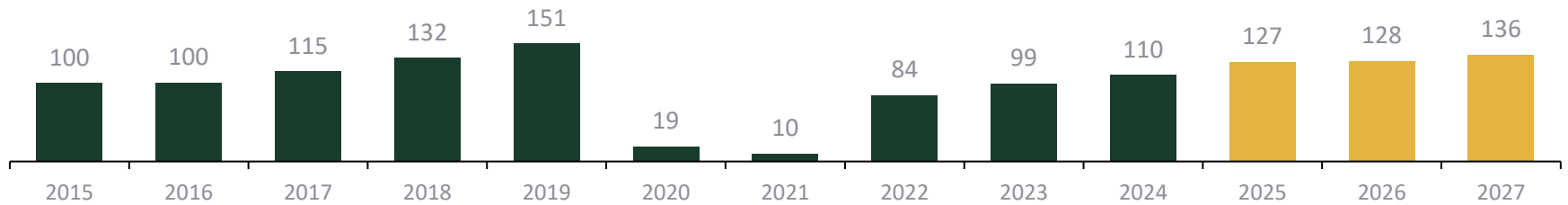
Spending

4.1%

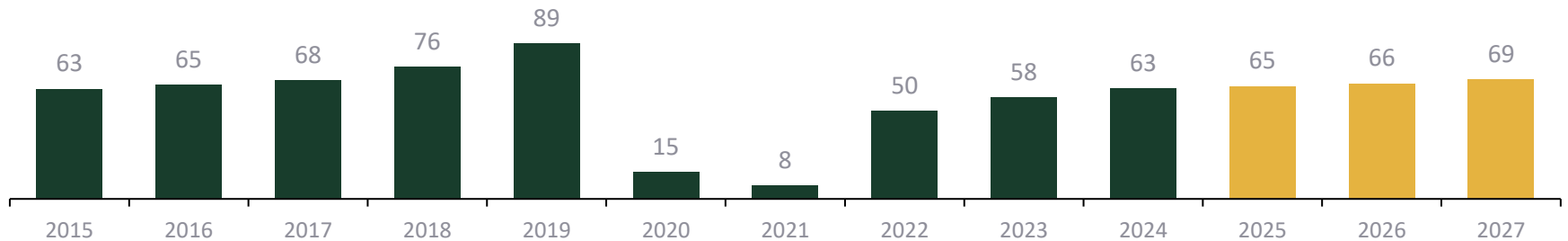
Visits

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%

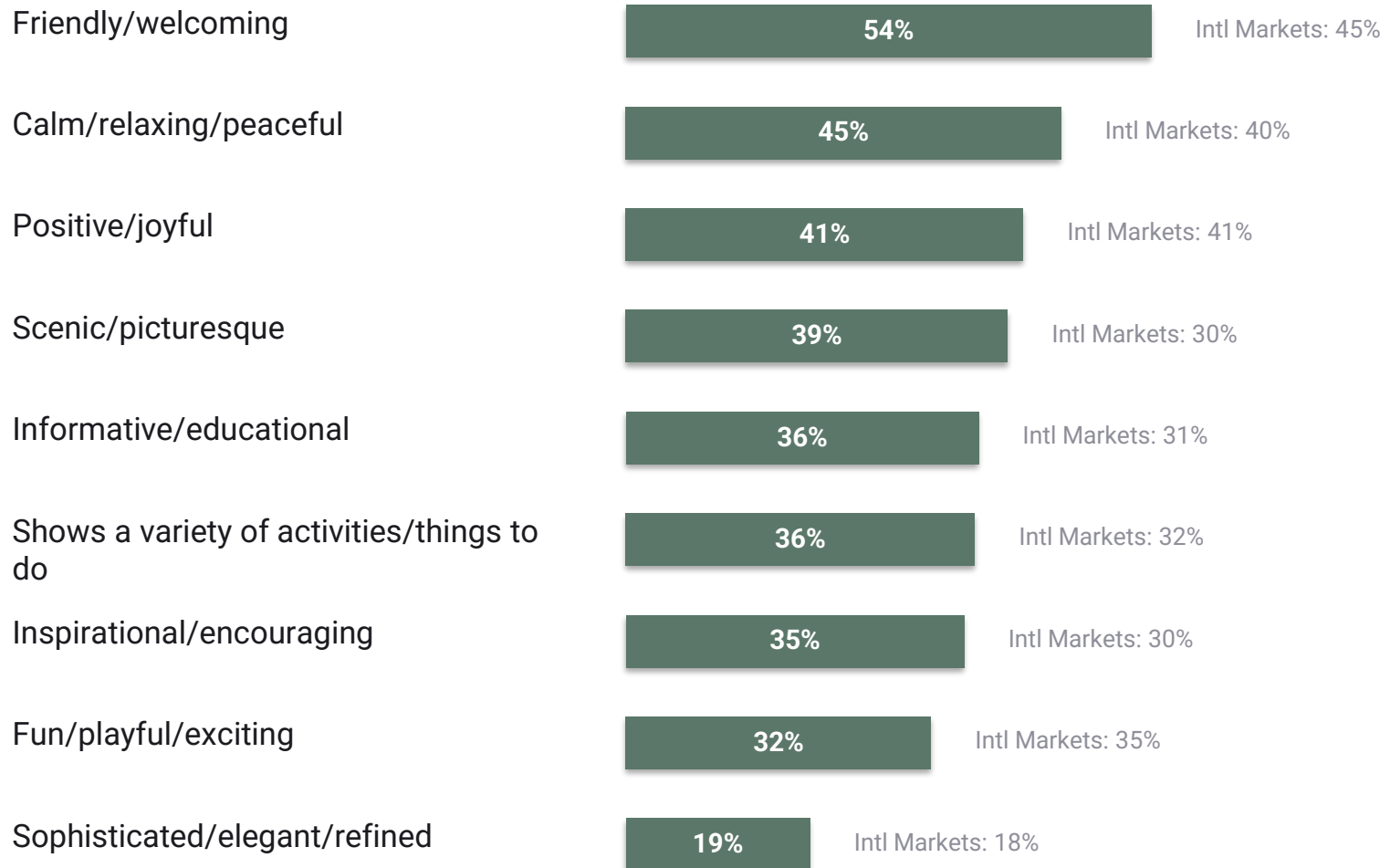
41%

Likely to Visit (5yr)

Intl Markets: 41%

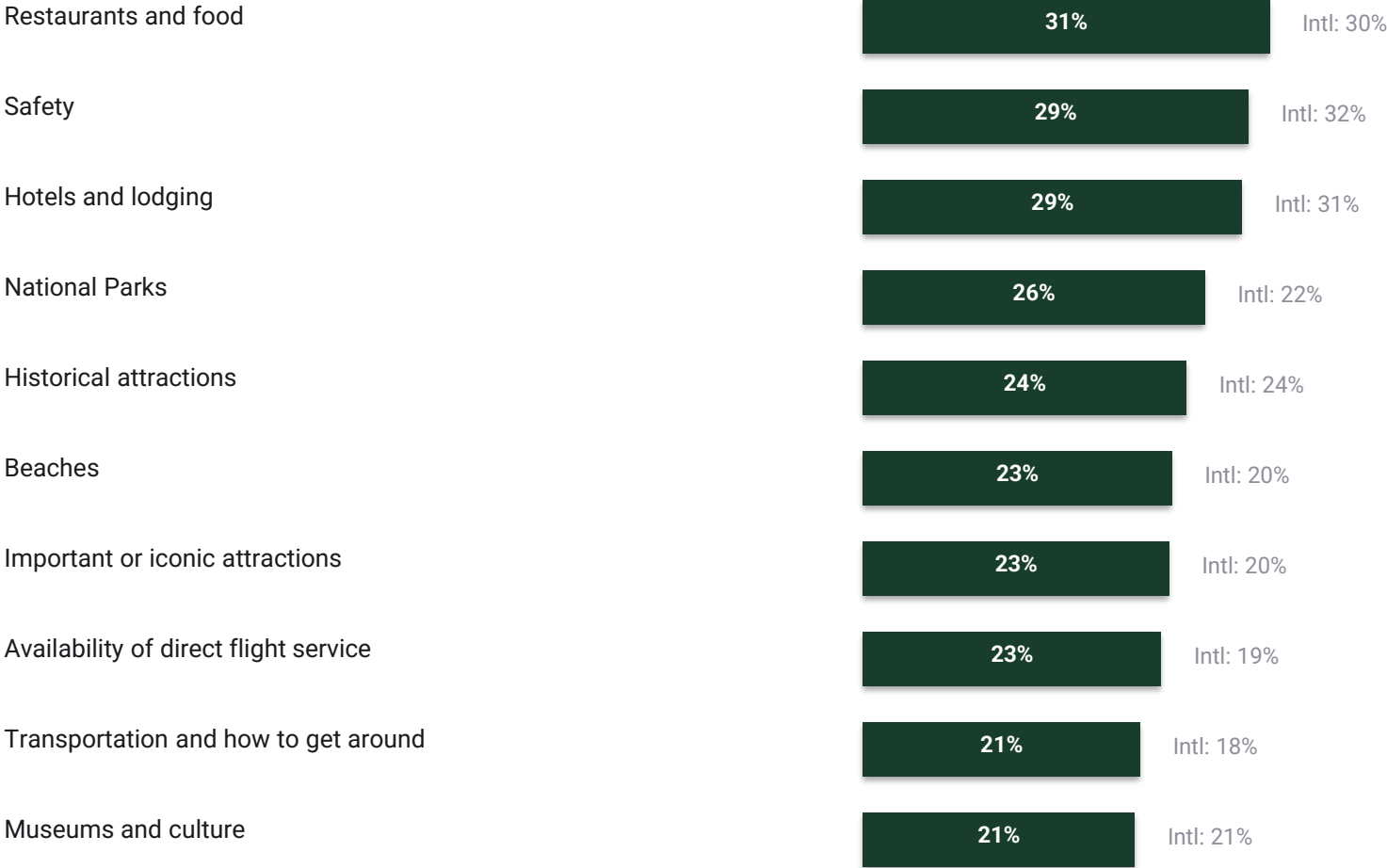
Desired Travel Promotion Tone

United Kingdom



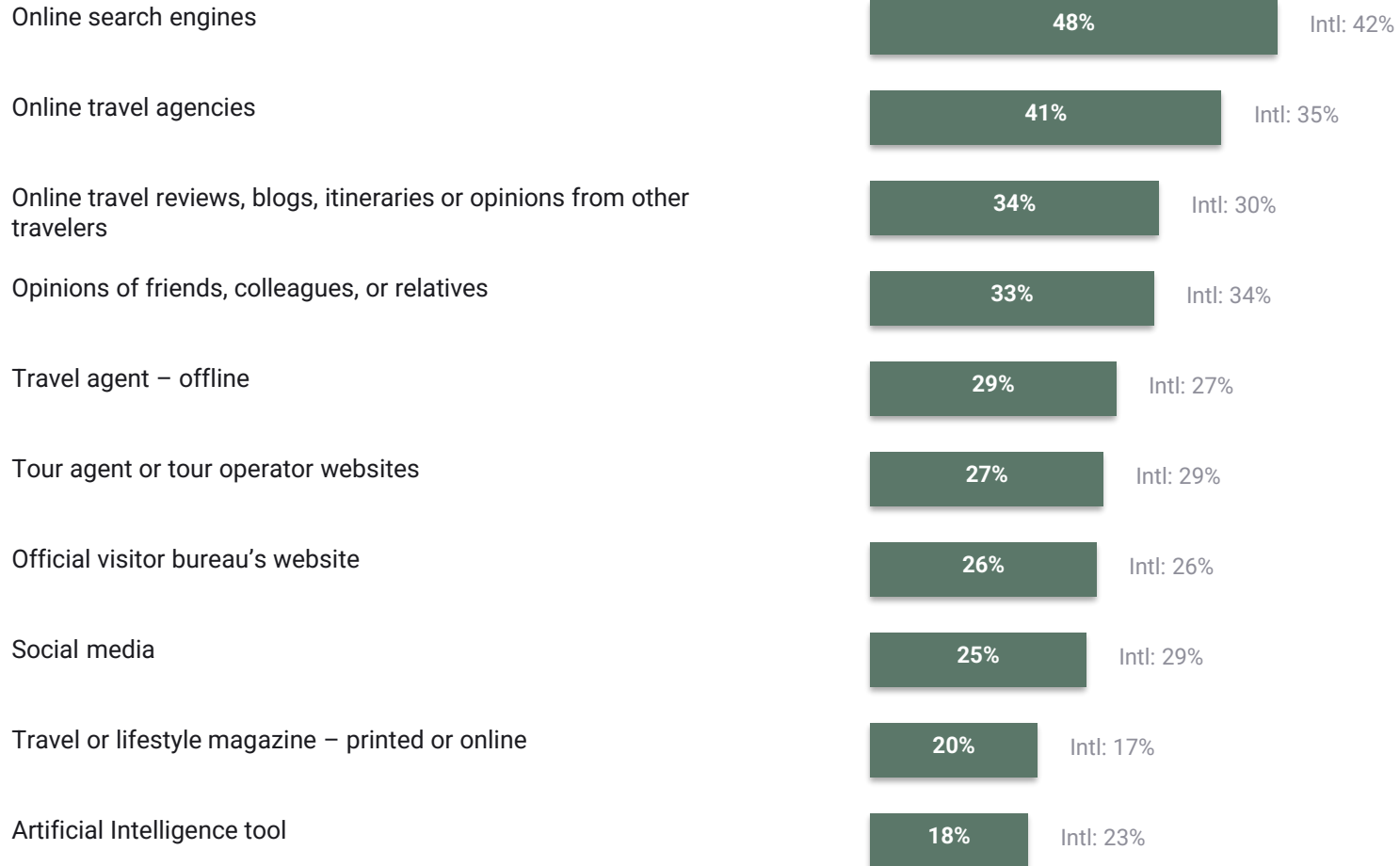
Top Information Sources

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

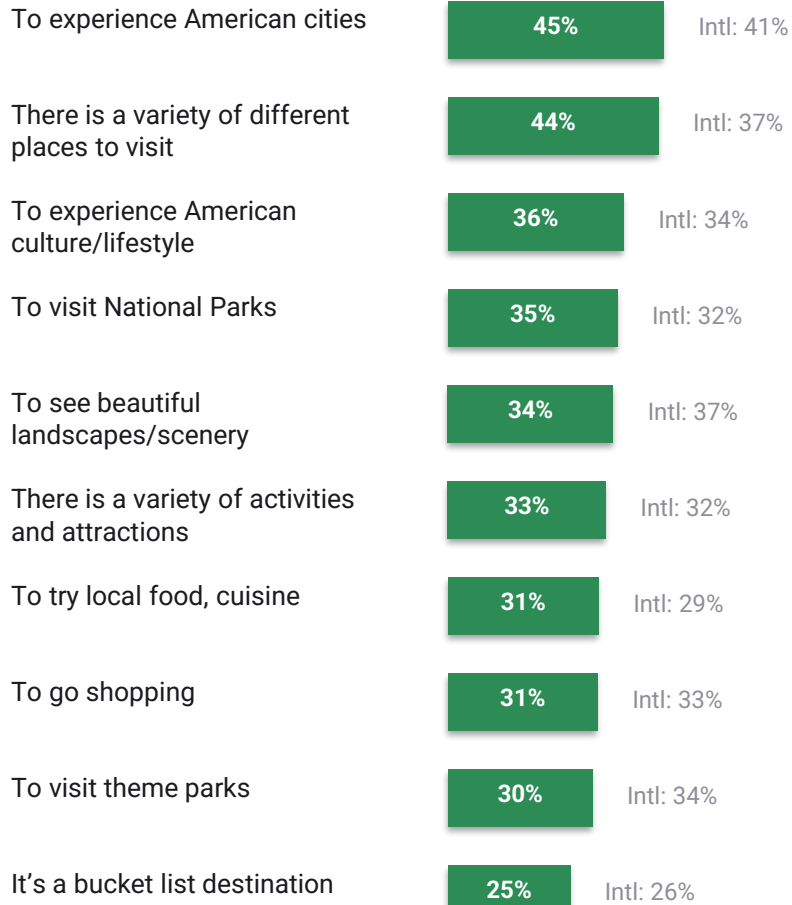
Total

Intl: \$5,049

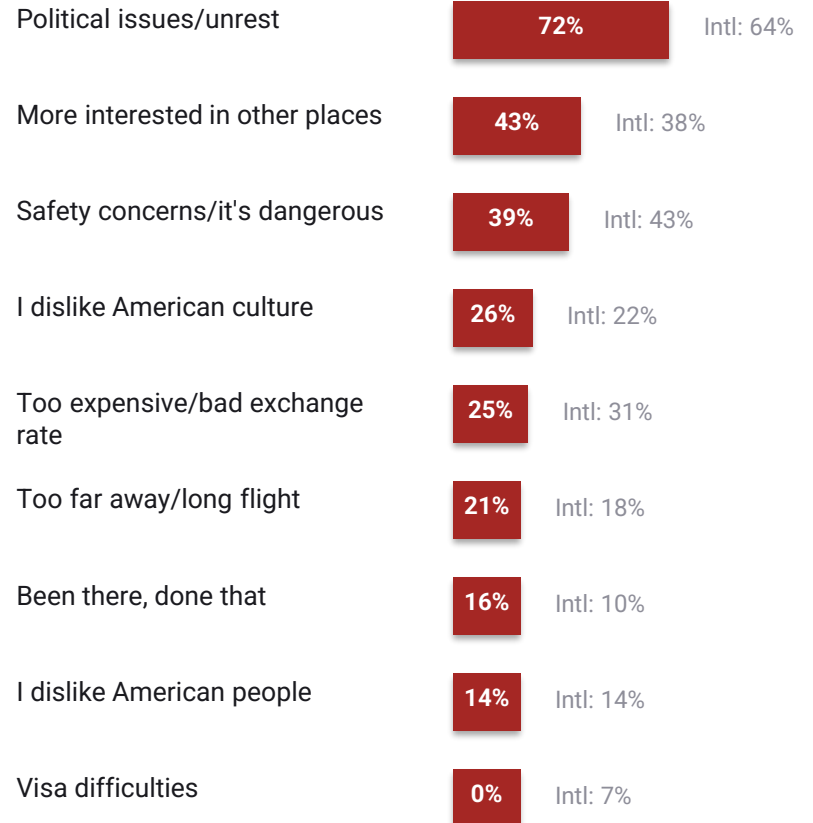
Enablers & Barriers to Visiting

United Kingdom

Enablers

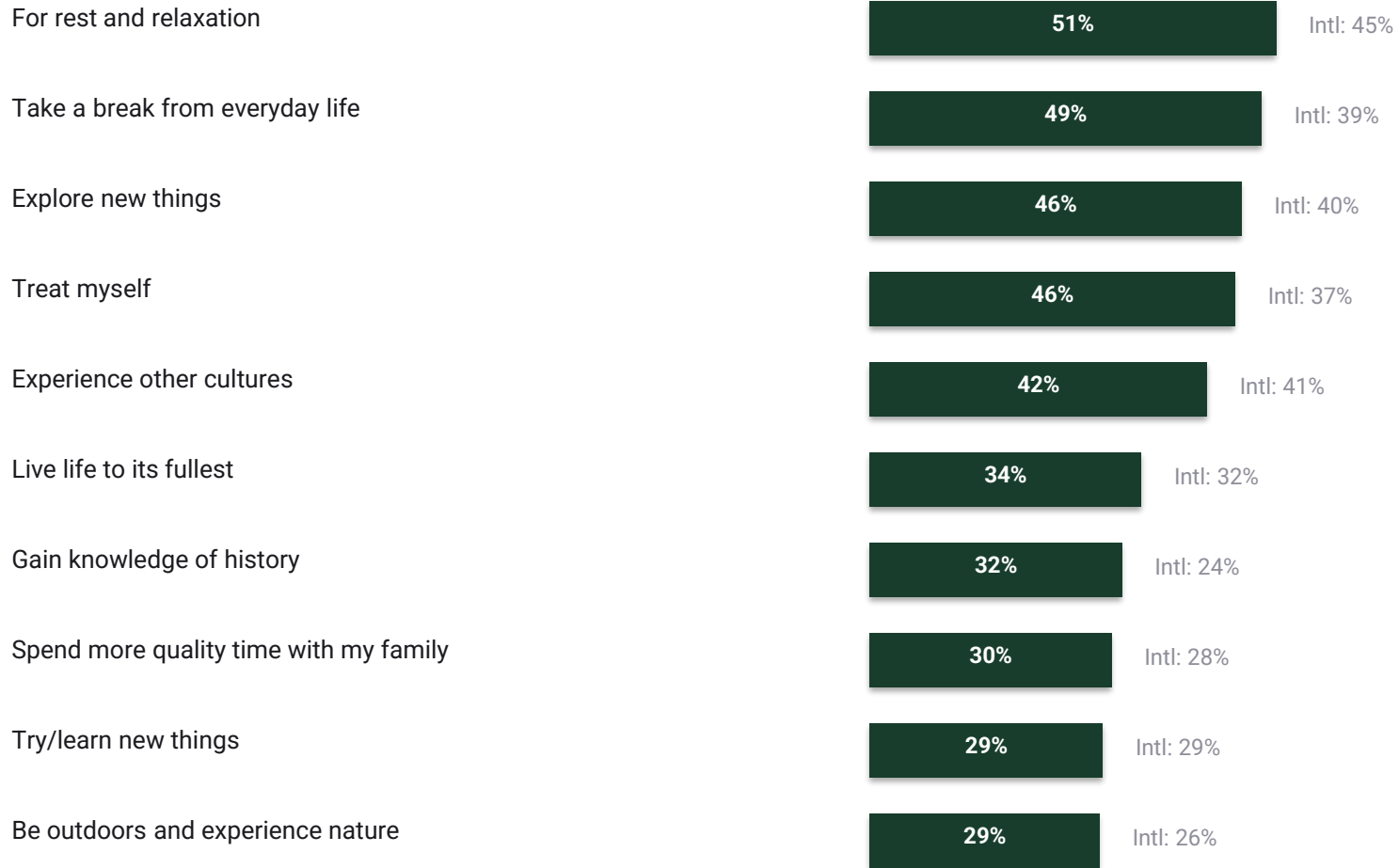


Barriers



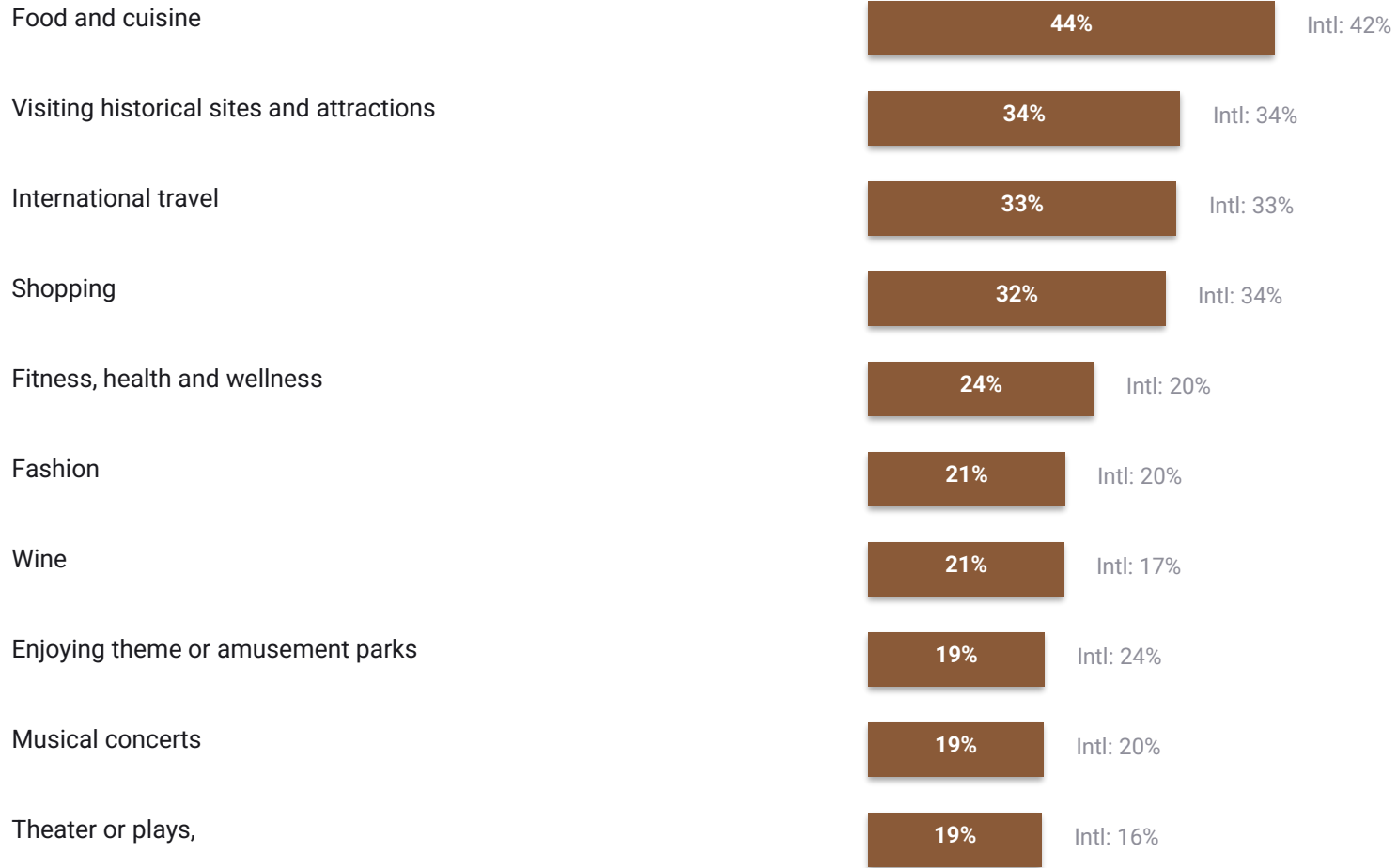
Travel Motivations

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

CANADA

Source Market Analysis | Tennessee

#2 by Spending | #1 by Visits

TENNESSEE
SOUNDS PERFECT

TravelSouth
All Y'all Are Welcome USA

Canada | Key Findings

- 1 2026 Tennessee projected spending:** \$119.2M (+6.3% YOY). Projected visitors: 220.4K (+4.8% YOY). Ranks #2 by spending and #1 by visits among Tennessee 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 (0.5%) exceeds 2015-2019 (0.2%).
- 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

\$119.2M

2026 Tennessee Spending

+6.3% YOY vs. 2025

220.4K

2026 Tennessee Visitors

+4.8% YOY vs. 2025

\$16.4B

2026 USA Spending

+7.6% YOY vs. 2025

20.9M

2026 USA Visitors

+6.6% YOY vs. 2025

\$112.1M

2025 Tennessee Spending

-22.1% YOY vs. 2024

210.3K

2025 Tennessee Visitors

-21.1% 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

0.2%

Spending

4.1%

Visits

2023-2027 PROJECTED CAGR

0.5%

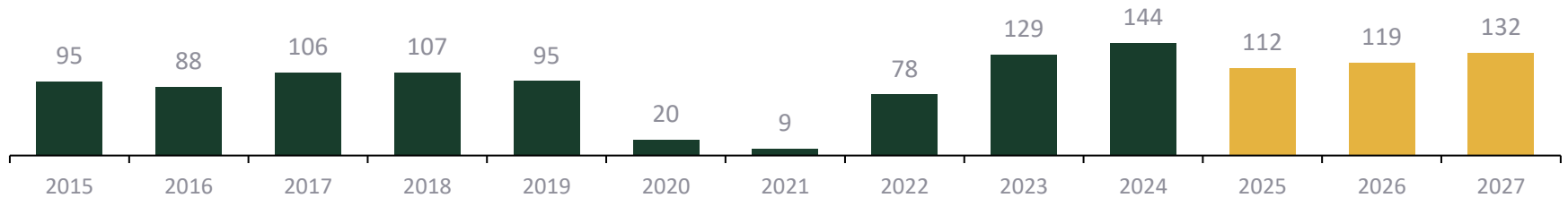
Spending

-2.3%

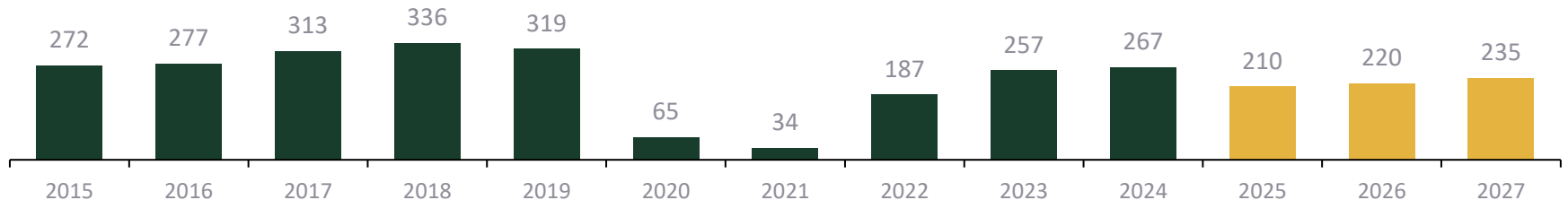
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

Canada

66%

Familiarity

Intl Markets: 67%

70%

Appeal

Intl Markets: 75%

24%

Promotional Buzz

Intl Markets: 29%

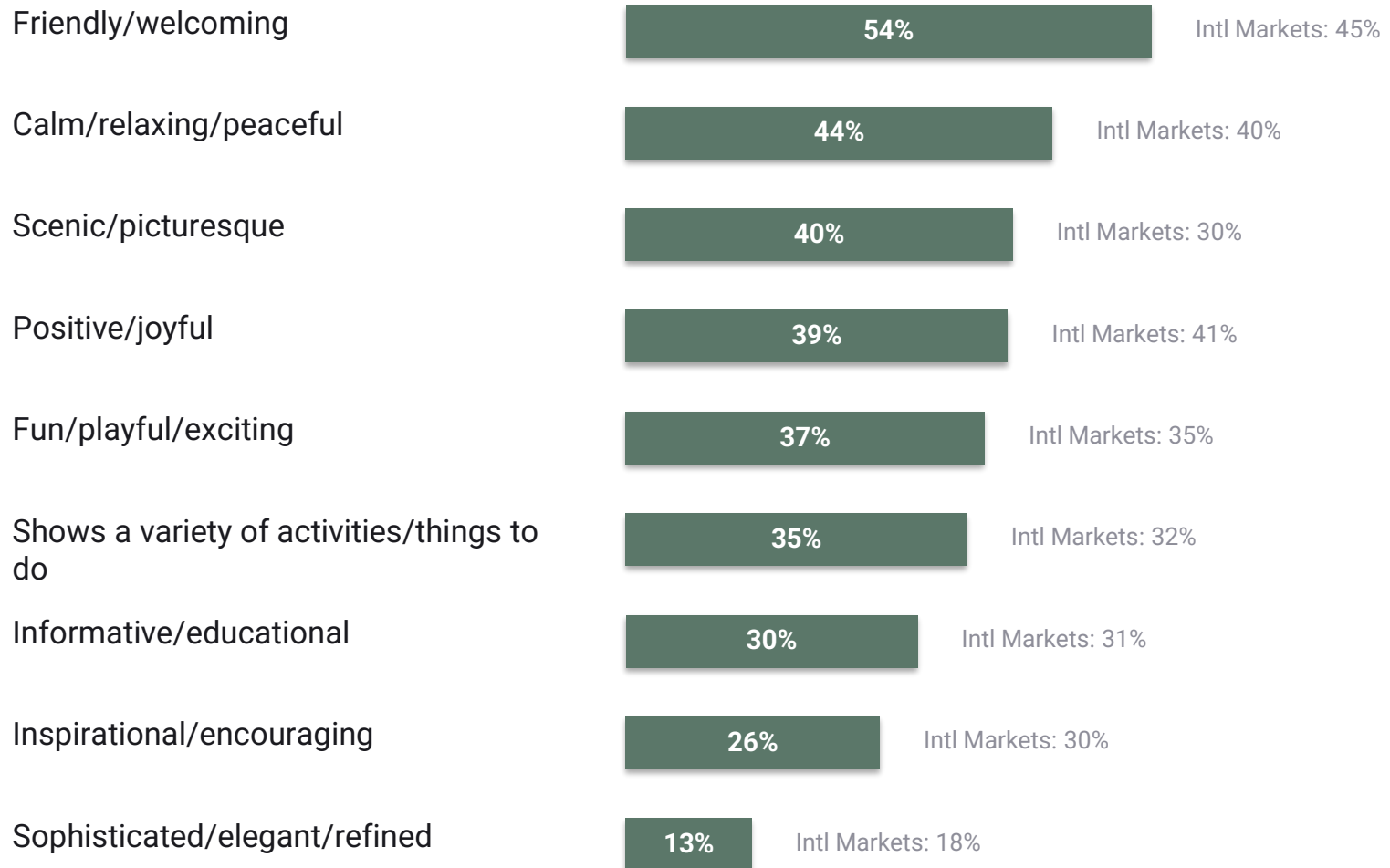
38%

Likely to Visit (5yr)

Intl Markets: 41%

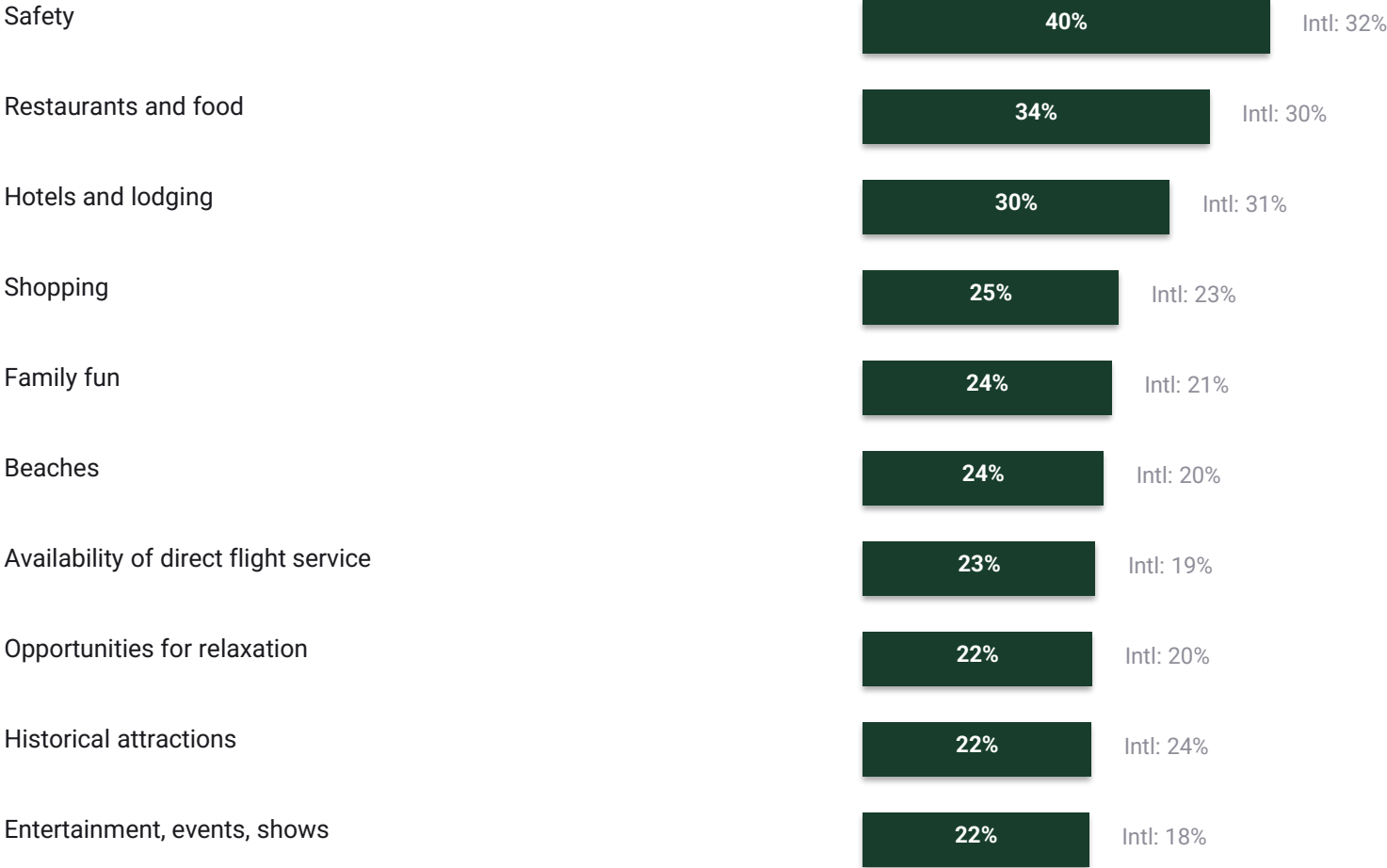
Desired Travel Promotion Tone

Canada



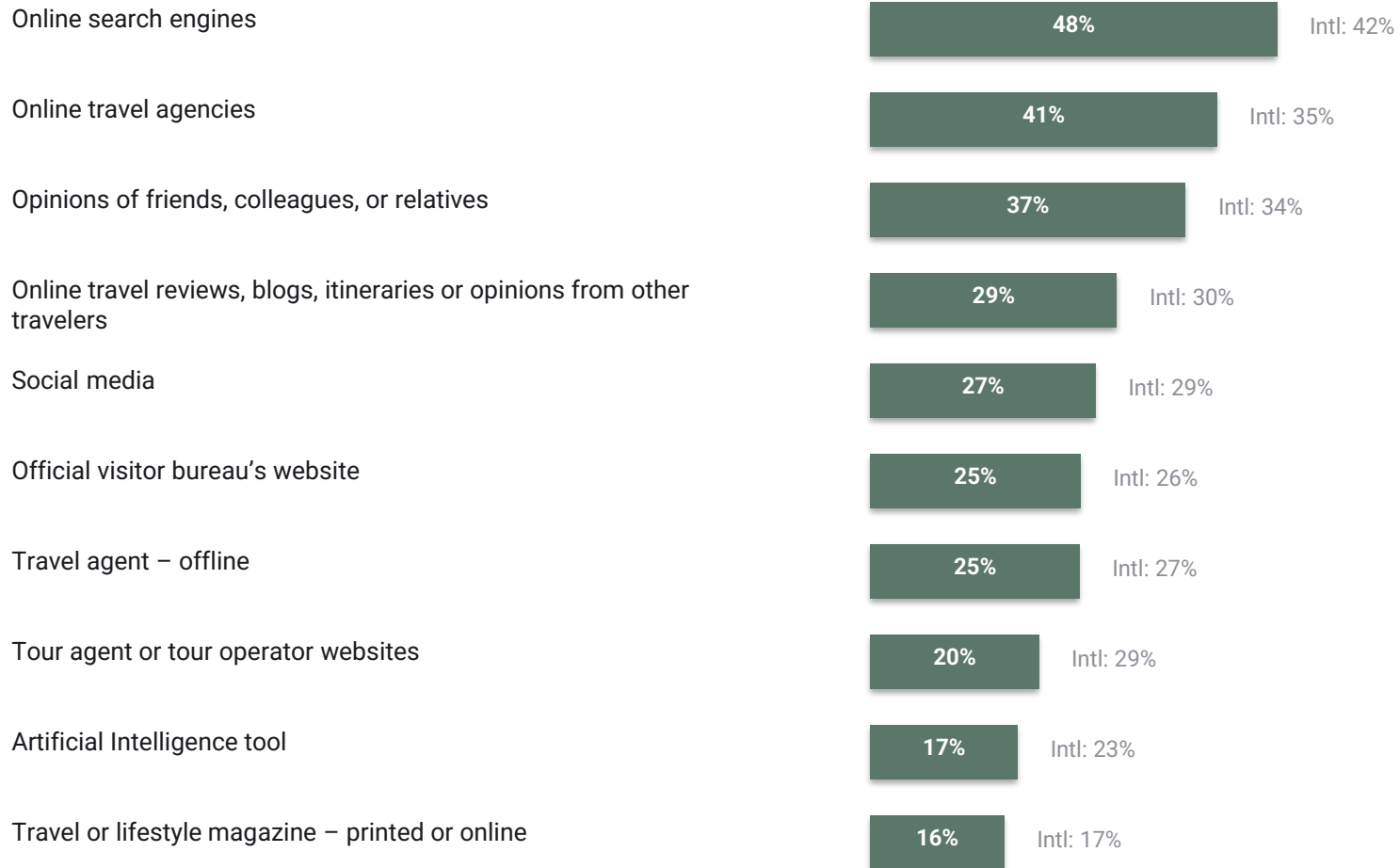
Top Information Sources

Canada



Planning Resources

Canada



U.S. Travel Planning & Budget

Canada

U.S. Trip Planning

36%

Likely to Visit US (2yr)

Intl Markets: 36%

12 wks

Planning Window

Intl Markets: 14 wks

11 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

8.4

Avg Days in the U.S.

Intl Markets: 12.3

2.8

Avg Destinations in the U.S.

Intl Markets: 4.4

2.1

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,095

Hotels

Intl: \$1,568

\$481

Shopping

Intl: \$1,001

\$510

Dining

Intl: \$826

\$383

Sightseeing

Intl: \$881

\$480

Transport

Intl: \$772

\$2,949

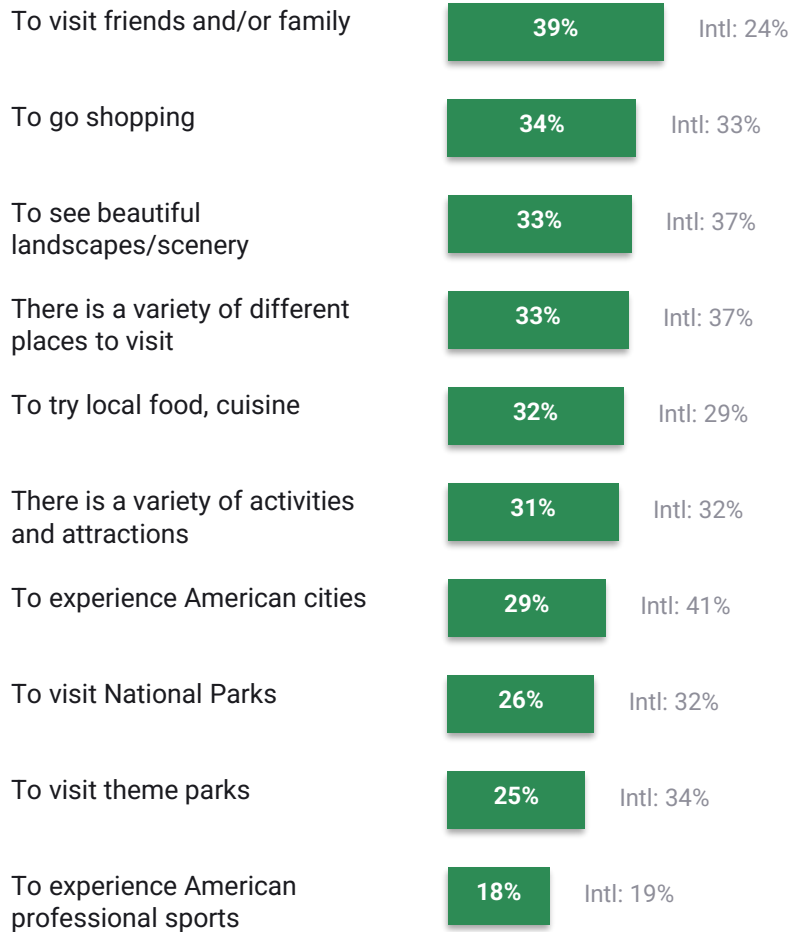
Total

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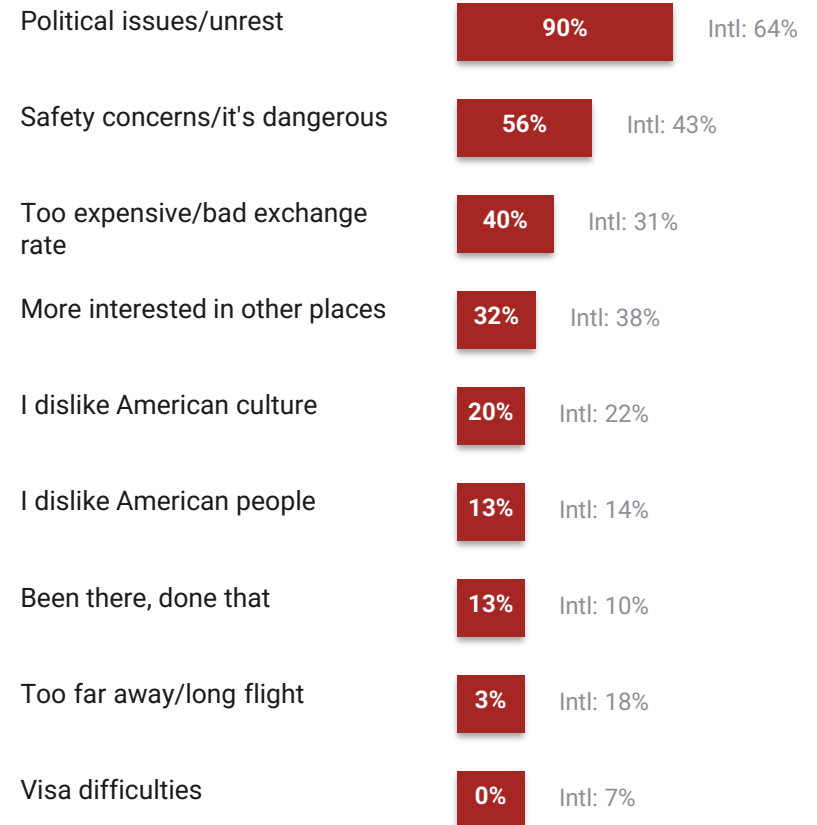
Enablers & Barriers to Visiting

Canada

Enablers

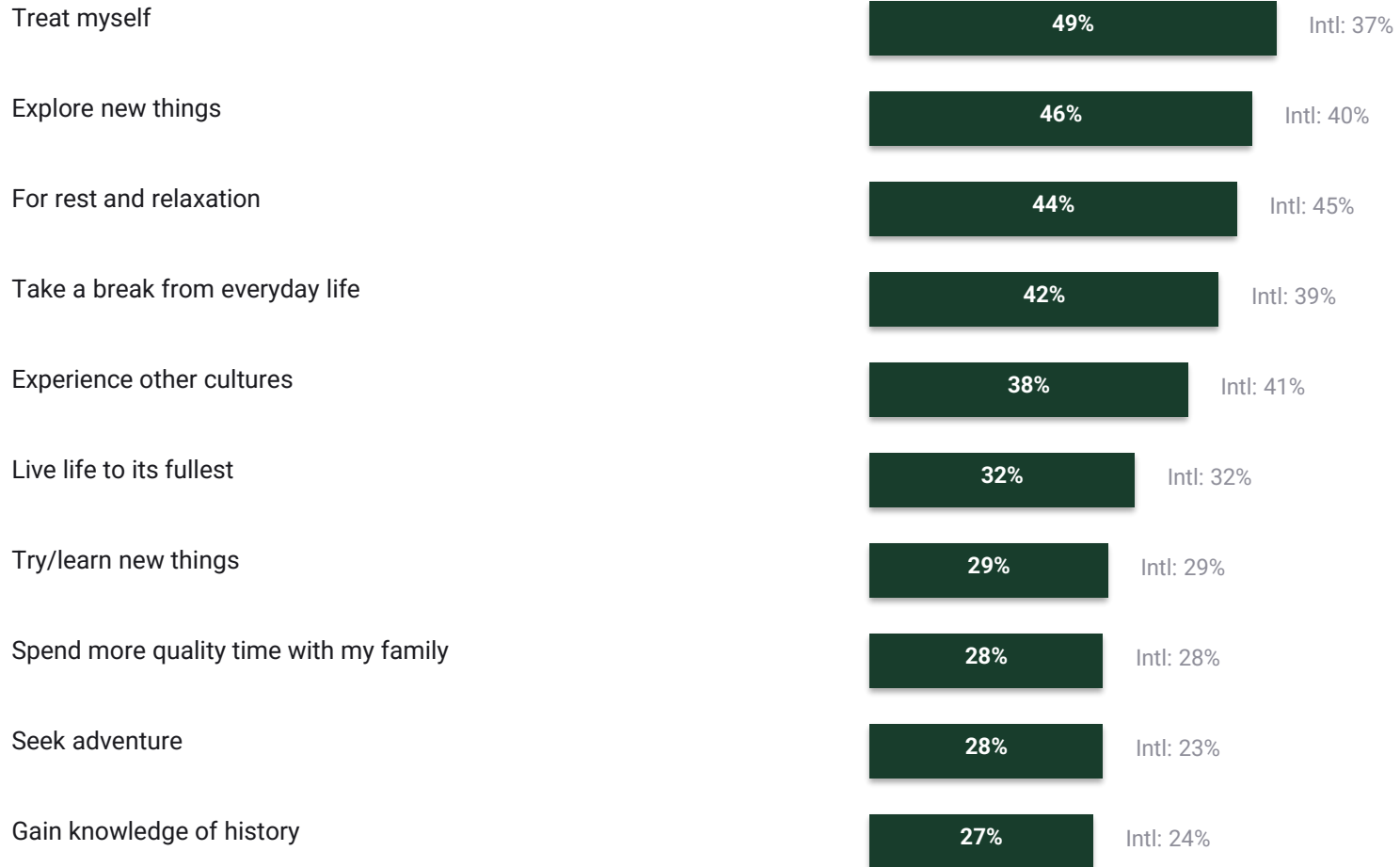


Barriers



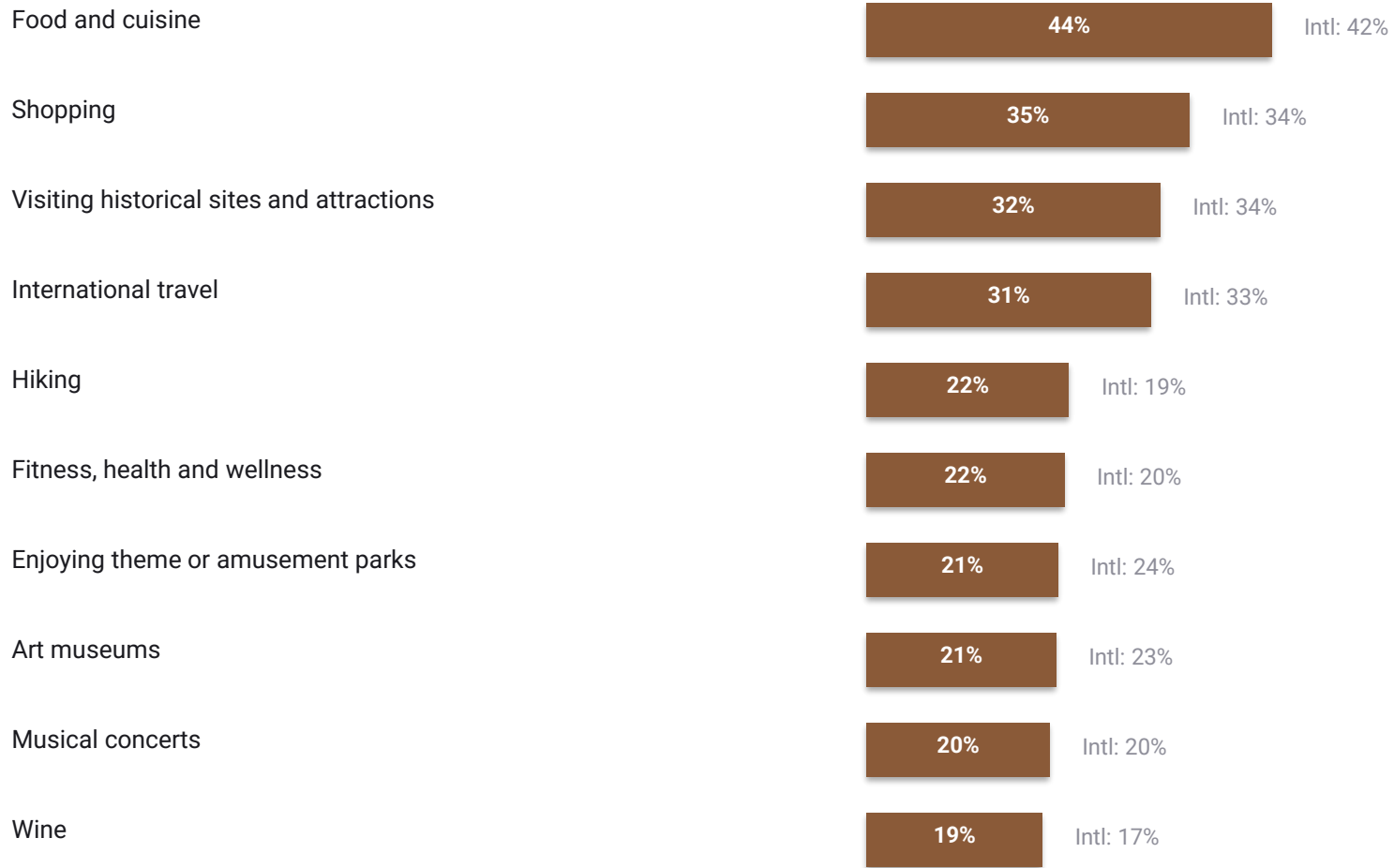
Travel Motivations

Canada



Hobbies & Passions

Canada



Travel Trends & Outlook

Canada

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

59%

Intl: 54%

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53%

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Intl: 44%

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

24%

Intl: 27%

Canada

Intl Markets

AUSTRALIA

Source Market Analysis | Tennessee

#3 by Spending | #5 by Visits

TENNESSEE
SOUNDS PERFECT

TravelSouth
All Y'all Are Welcome USA

Australia | Key Findings

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- 2 Macro Context:** Australia 2026 GDP growth projected at 2.1%%. Exchange rate: 0.71 AUD/USD.
- 3 CAGR Comparison:** 2023-2027 projected spending CAGR (6.1%) trails 2015-2019 (10.6%).
- 4 Visitor Perceptions:** 66% familiarity with the American South, 70% appeal, 32% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$6,279 for a 2-week trip. Average length of stay: 14.9 days. Average destinations: 4.9.
- 6 Top Motivation:** Explore new things (51%)
- 7 Top Enabler:** To experience American cities (43%)
- 8 Preferred Tone:** Friendly/welcoming (54%)
- 9 Top Barrier:** Political issues/unrest (76%)

Australia

\$60.6M

2026 Tennessee Spending

+6.3% YOY vs. 2025

22.5K

2026 Tennessee Visitors

+4.2% YOY vs. 2025

\$6.2B

2026 USA Spending

+6.2% YOY vs. 2025

2.3M

2026 USA Visitors

+4.4% YOY vs. 2025

\$57M

2025 Tennessee Spending

-14.3% YOY vs. 2024

21.6K

2025 Tennessee Visitors

-5.3% YOY vs. 2024

\$5.9B

2025 USA Spending

-11.1% YOY vs. 2024

2.2M

2025 USA Visitors

-3.2% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

10.6%

Spending

8.3%

Visits

2023-2027 PROJECTED CAGR

6.1%

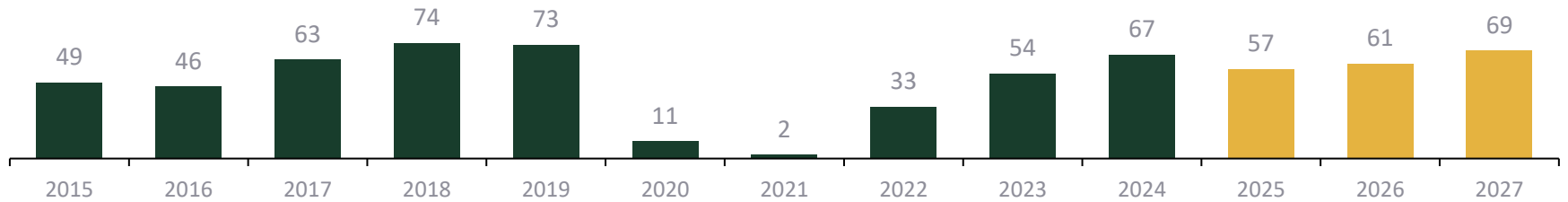
Spending

2.8%

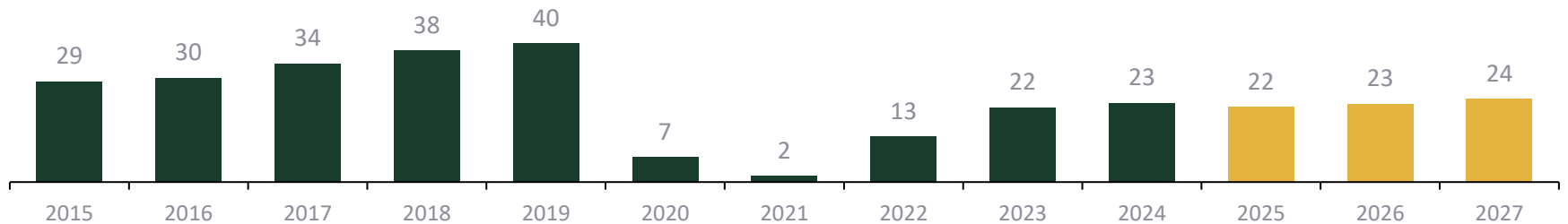
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Visitor Perceptions | The American South

Australia

66%

Familiarity

Intl Markets: 67%

70%

Appeal

Intl Markets: 75%

16%

Promotional Buzz

Intl Markets: 29%

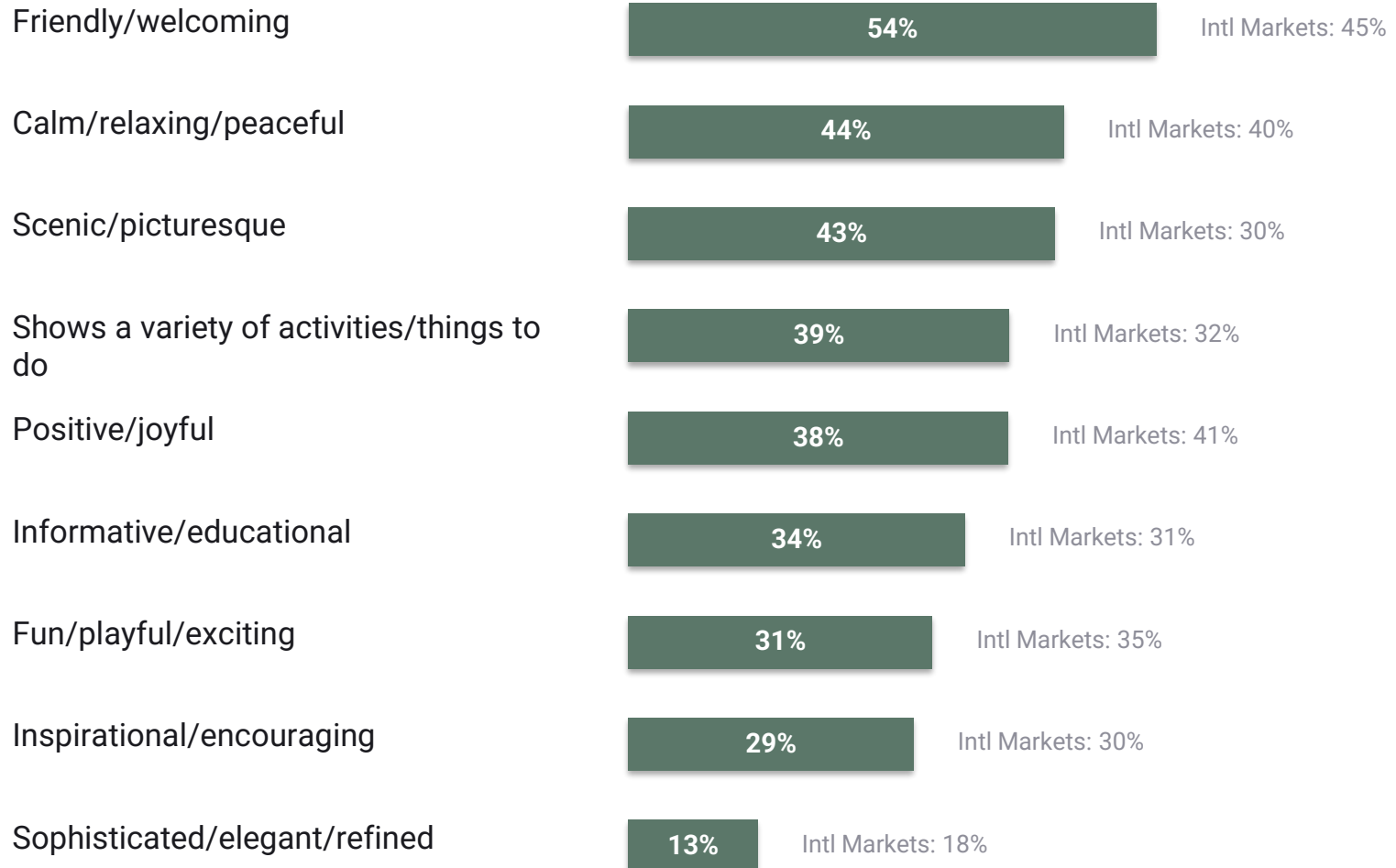
32%

Likely to Visit (5yr)

Intl Markets: 41%

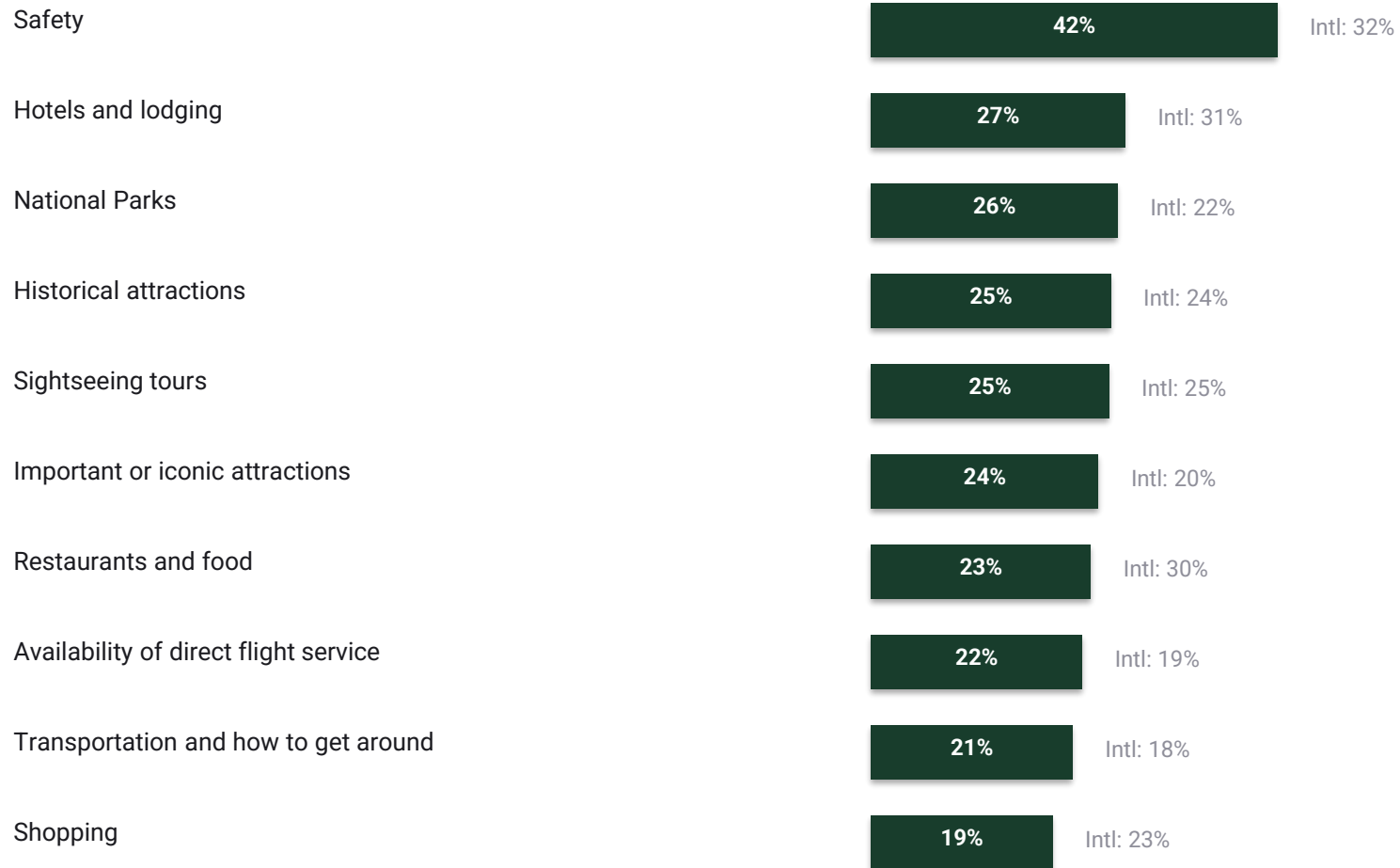
Desired Travel Promotion Tone

Australia



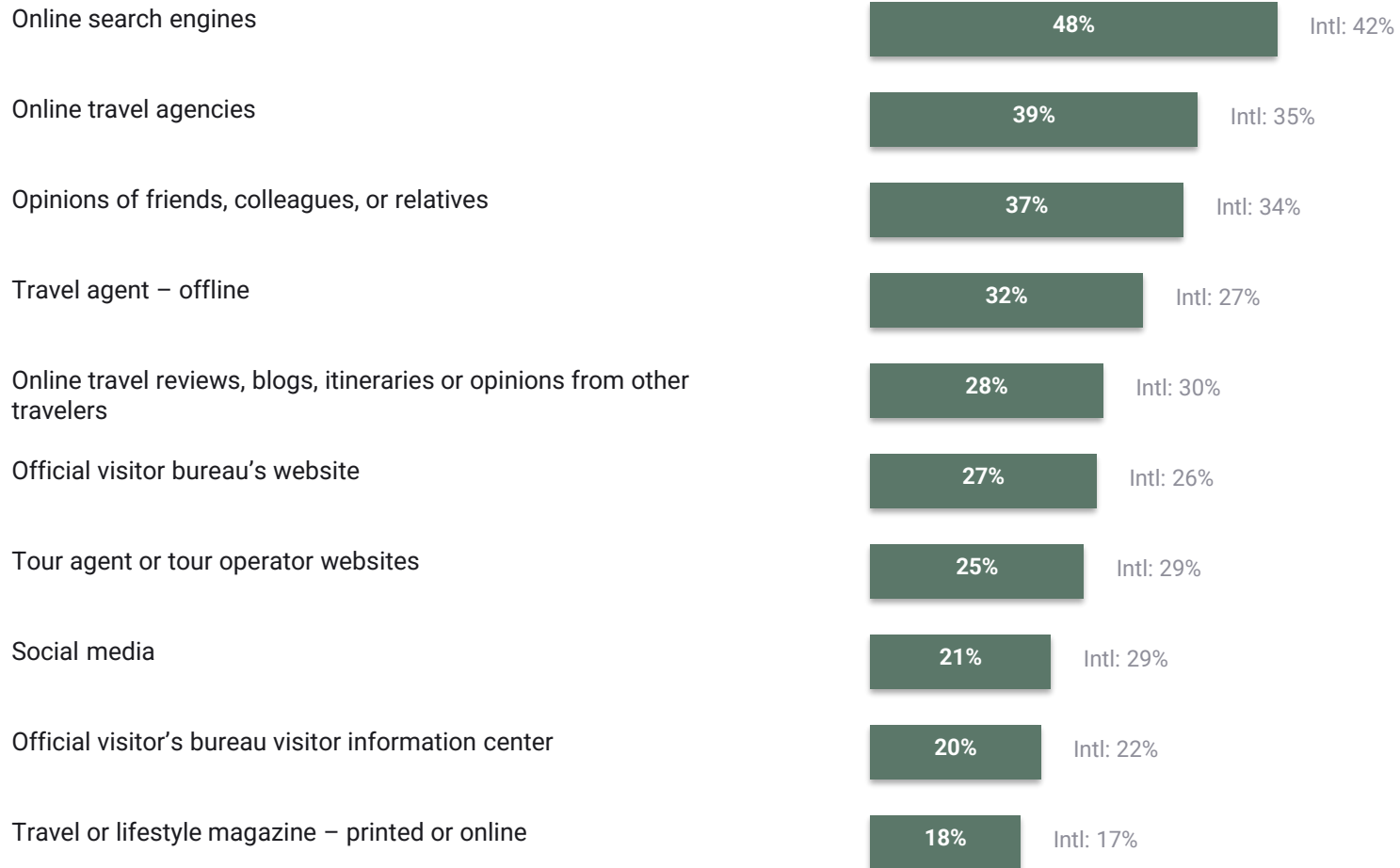
Top Information Sources

Australia



Planning Resources

Australia



U.S. Travel Planning & Budget

Australia

U.S. Trip Planning

21%

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

14.9

Avg Days in the U.S.

Intl Markets: 12.3

4.9

Avg Destinations in the U.S.

Intl Markets: 4.4

1.8

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,917

Hotels

Intl: \$1,568

\$1,053

Shopping

Intl: \$1,001

\$915

Dining

Intl: \$826

\$1,416

Sightseeing

Intl: \$881

\$979

Transport

Intl: \$772

\$6,279

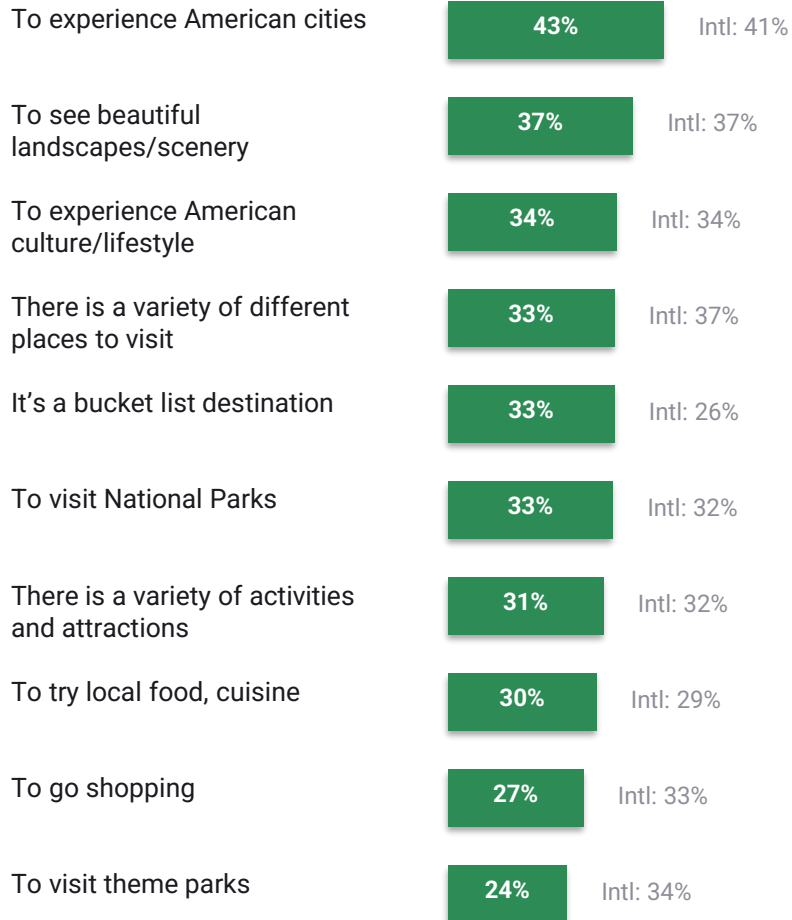
Total

Intl: \$5,049

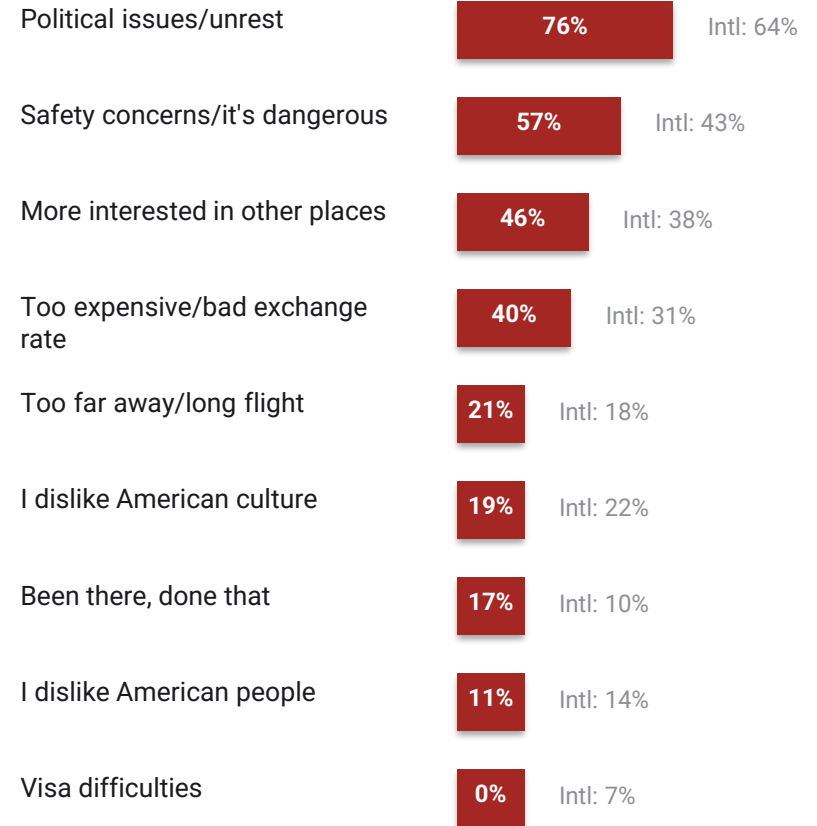
Enablers & Barriers to Visiting

Australia

Enablers

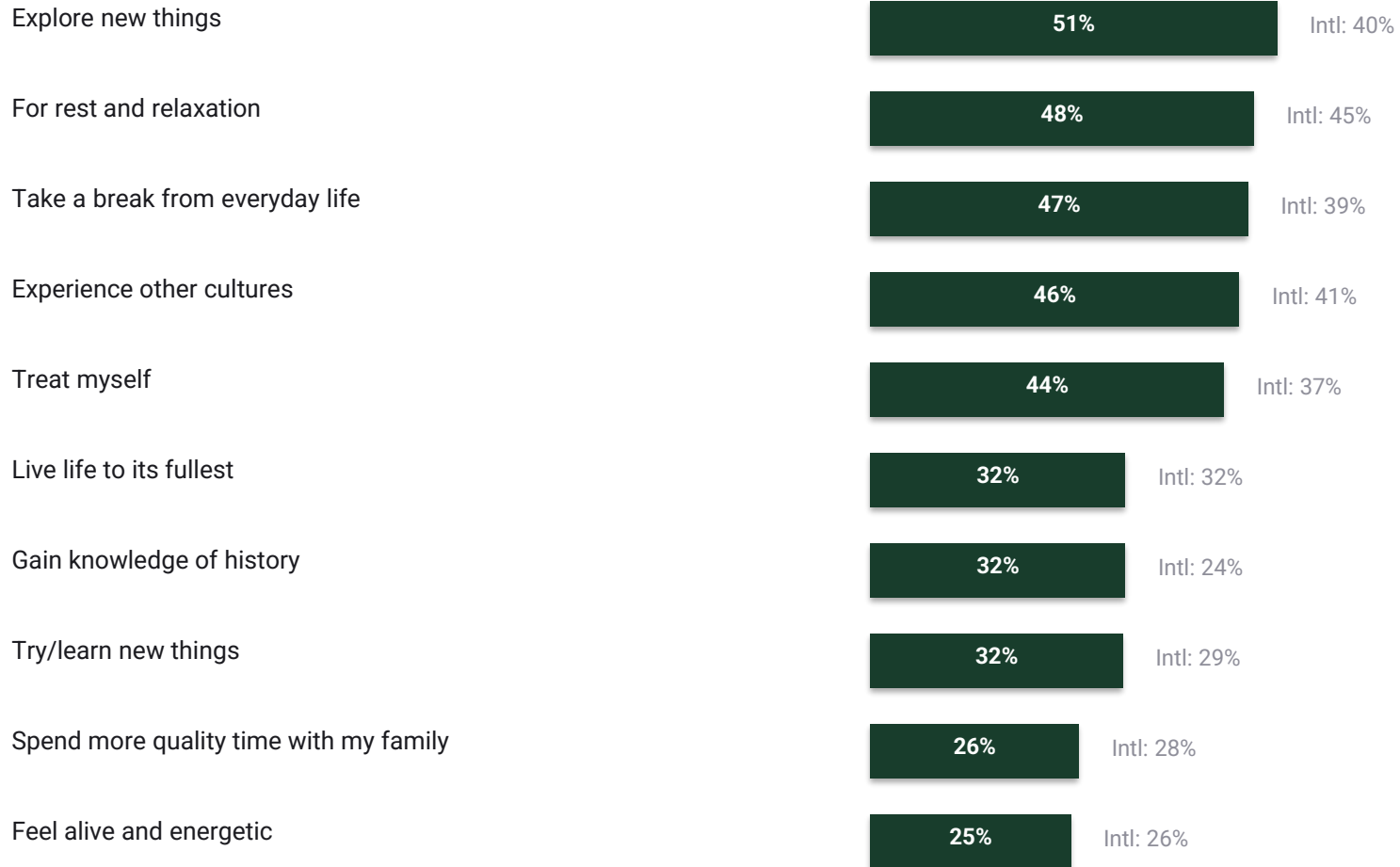


Barriers



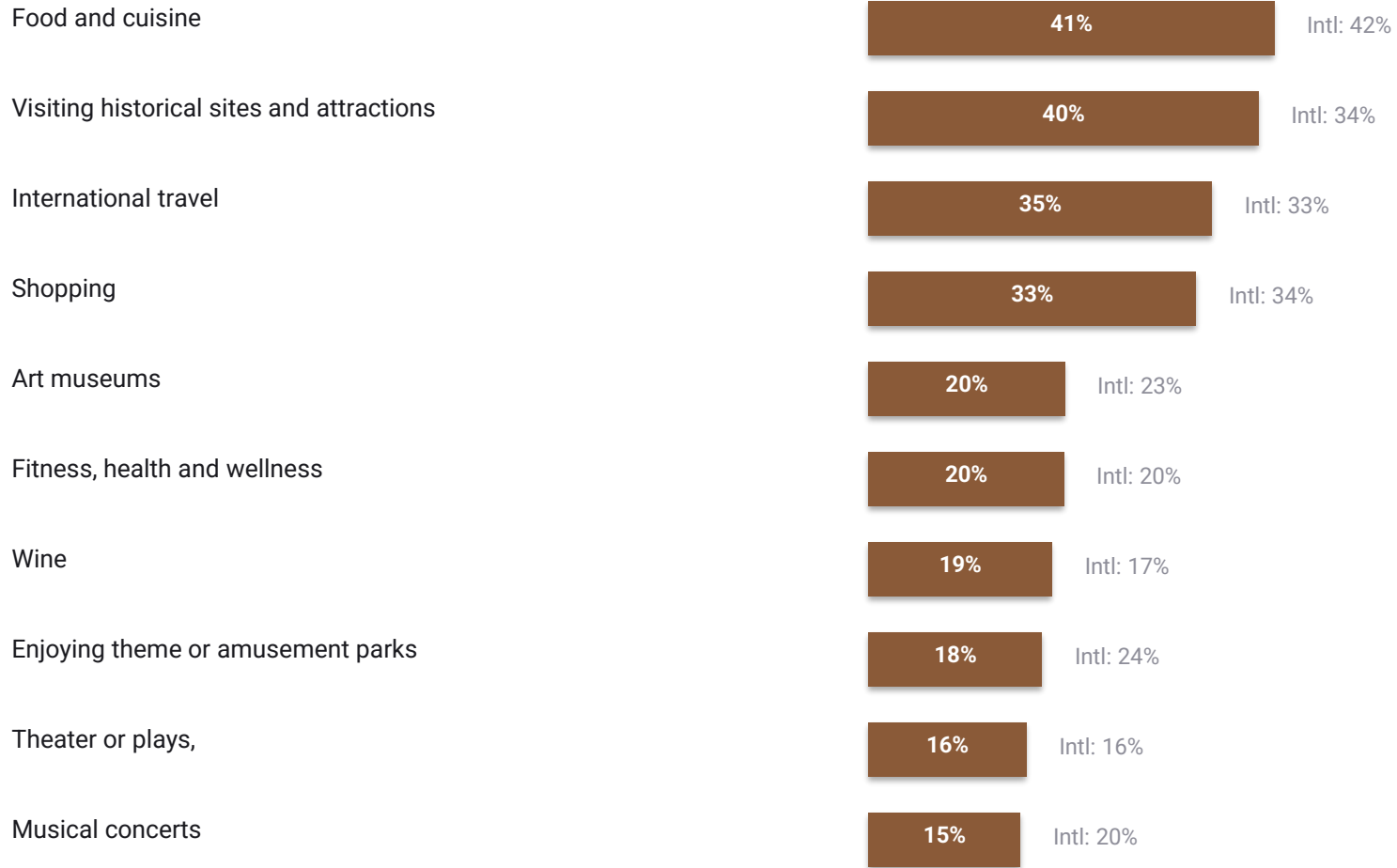
Travel Motivations

Australia



Hobbies & Passions

Australia



Travel Trends & Outlook

Australia

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

62%

Intl: 54%

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

52%

Intl: 53%

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).

37%

Intl: 42%

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

36%

Intl: 39%

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

35%

Intl: 43%

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

34%

Intl: 42%

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

29%

Intl: 34%

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

20%

Intl: 27%

 Australia

 Intl Markets

GERMANY

Source Market Analysis | Tennessee

#4 by Spending | #4 by Visits

TENNESSEE
SOUNDS PERFECT

TravelSouth
All Y'all Are Welcome USA

Germany | Key Findings

- 1 2026 Tennessee projected spending:** \$57.2M (+8.7% YOY). Projected visitors: 27.4K (+4.2% YOY). Ranks #4 by spending and #4 by visits among Tennessee 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 (7.3%) exceeds 2015-2019 (5.9%).
- 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

\$57.2M

2026 Tennessee Spending

+8.7% YOY vs. 2025

27.4K

2026 Tennessee Visitors

+4.2% YOY vs. 2025

\$6.3B

2026 USA Spending

+7.7% YOY vs. 2025

2.8M

2026 USA Visitors

+3.8% YOY vs. 2025

\$52.6M

2025 Tennessee Spending

+6% YOY vs. 2024

26.3K

2025 Tennessee Visitors

-11.1% 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

5.9%

Spending

4.9%

Visits

2023-2027 PROJECTED CAGR

7.3%

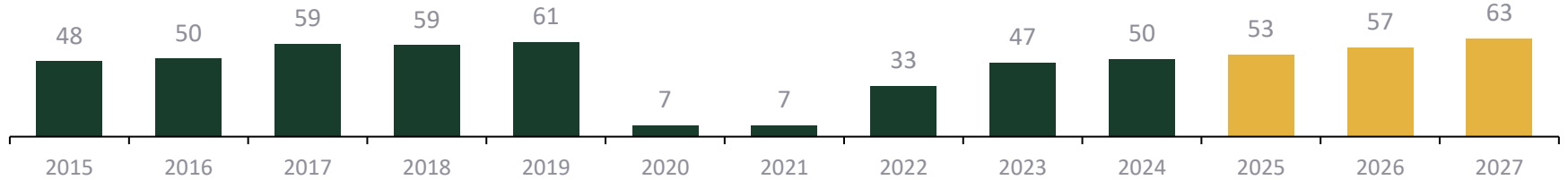
Spending

1.3%

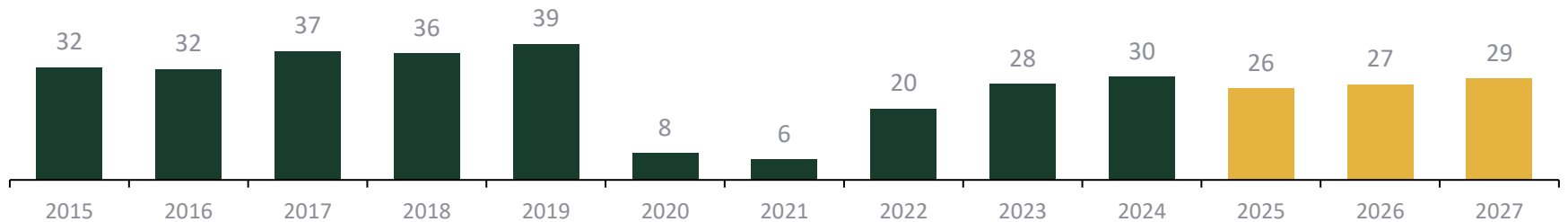
Visits

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%

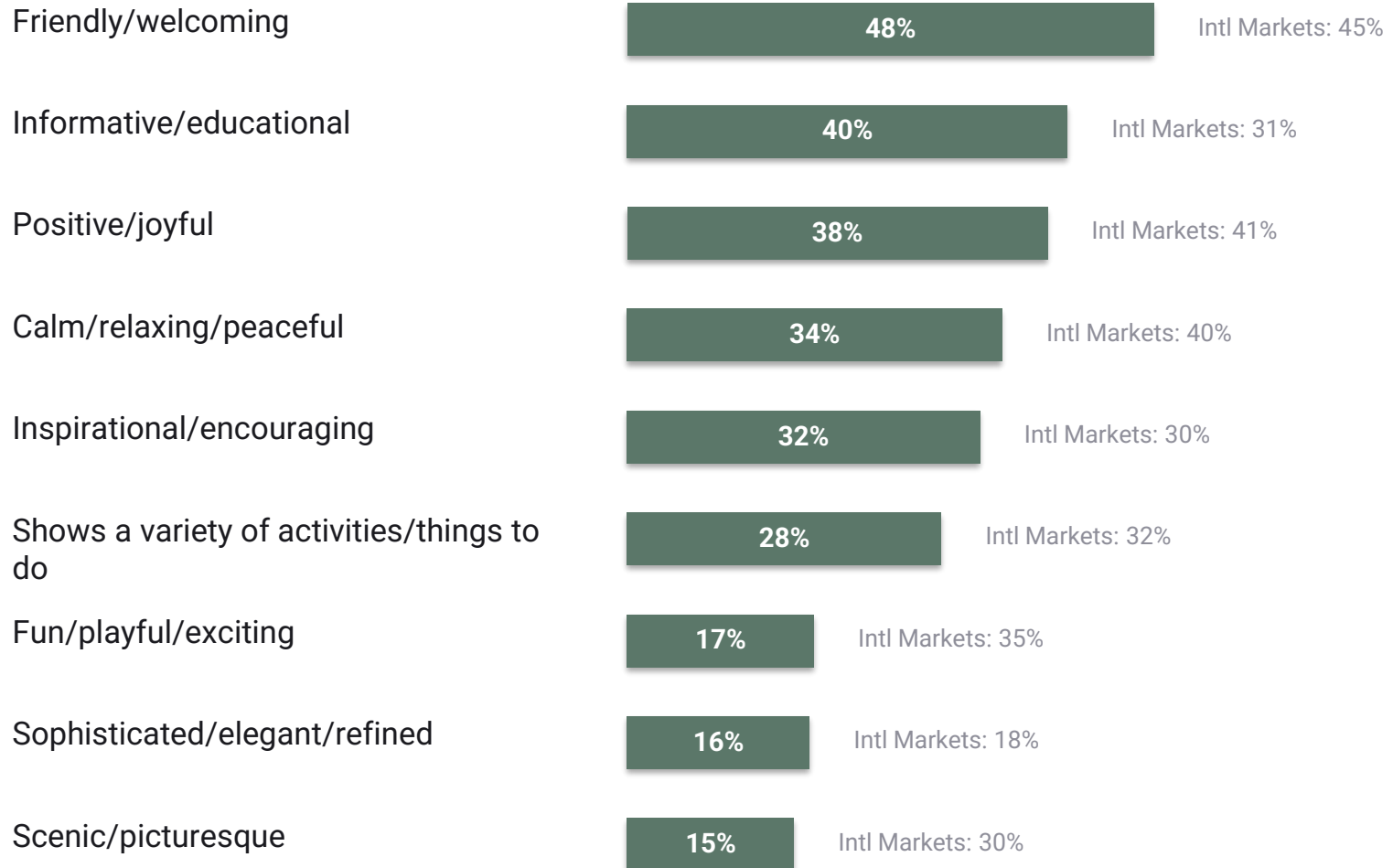
36%

Likely to Visit (5yr)

Intl Markets: 41%

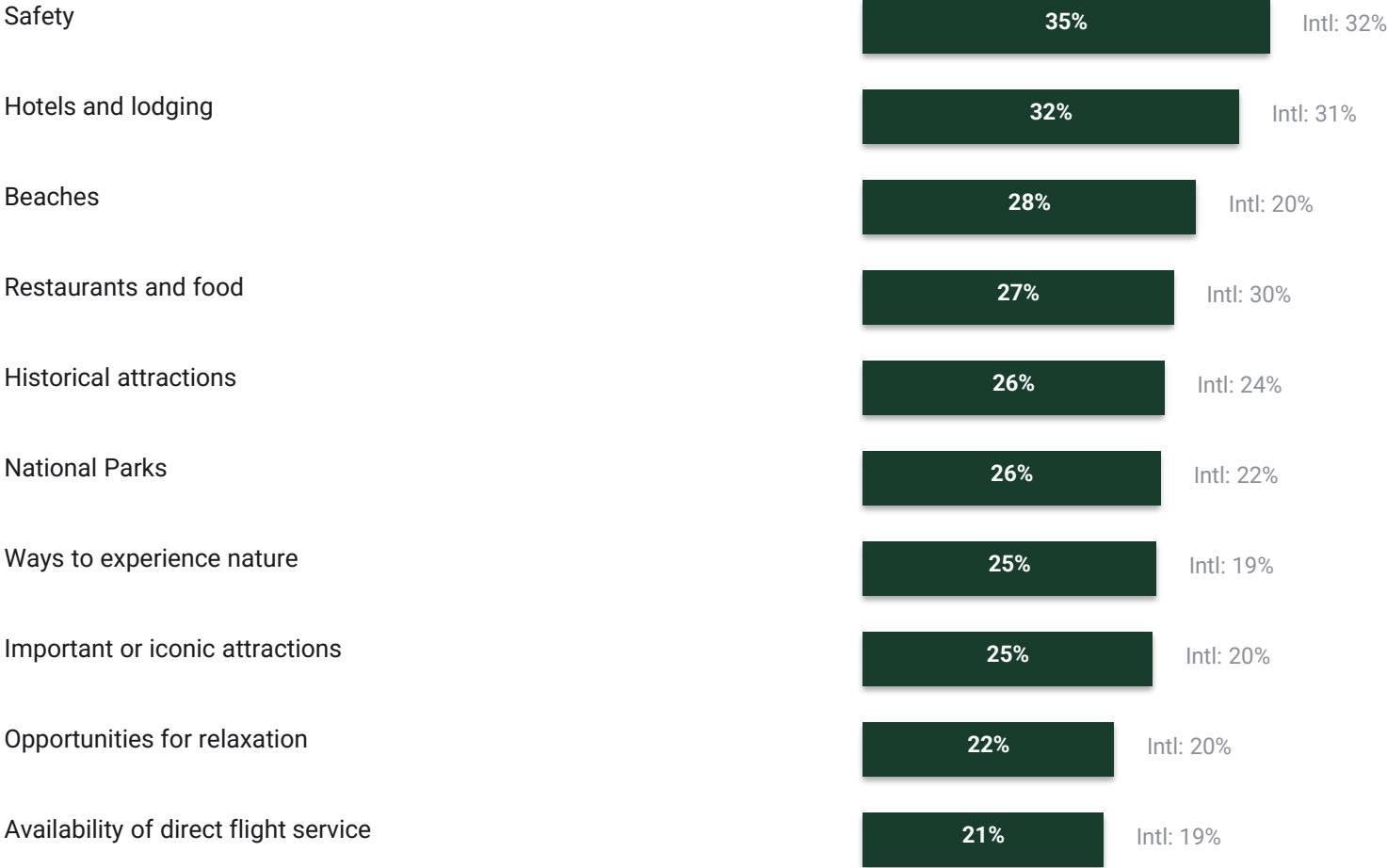
Desired Travel Promotion Tone

Germany



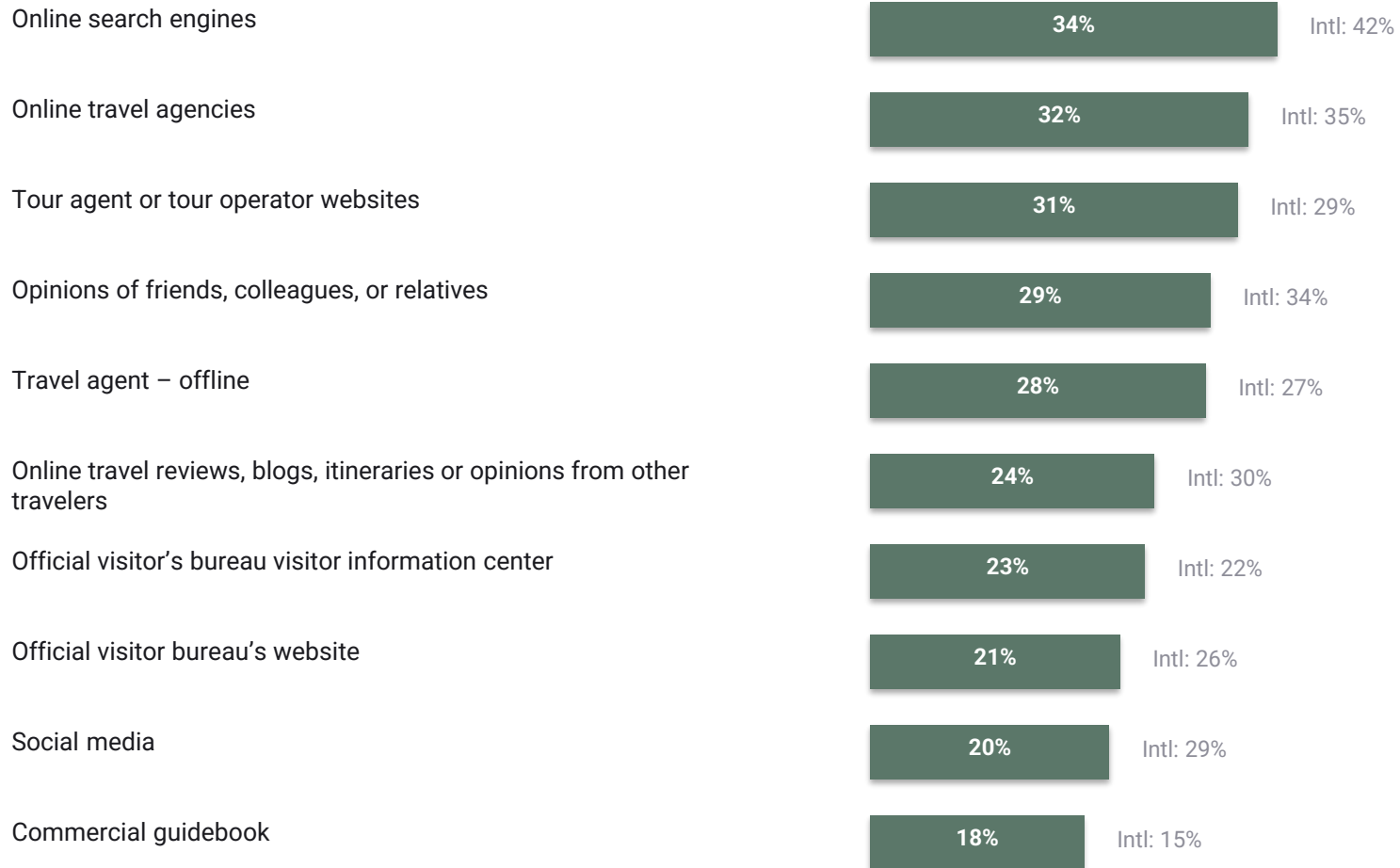
Top Information Sources

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

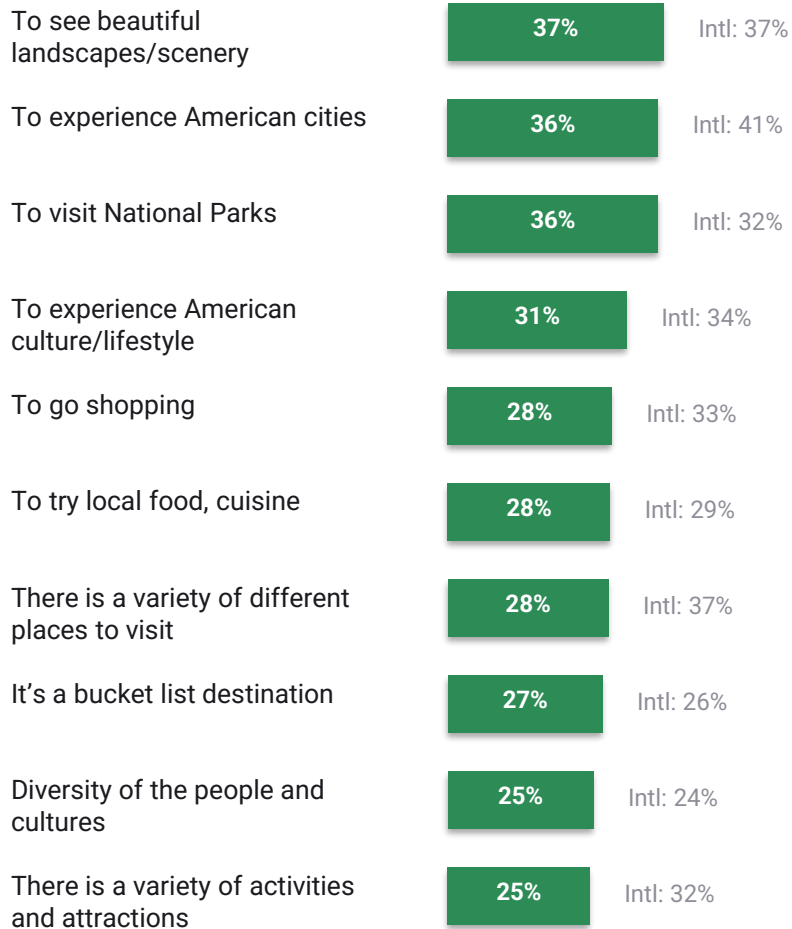
Total

Intl: \$5,049

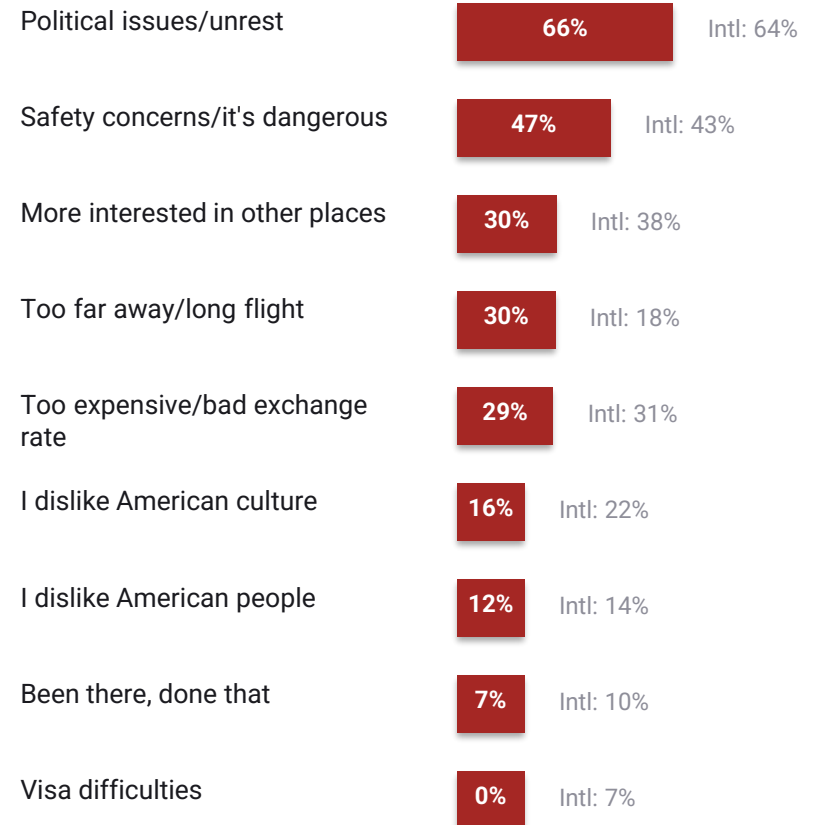
Enablers & Barriers to Visiting

Germany

Enablers

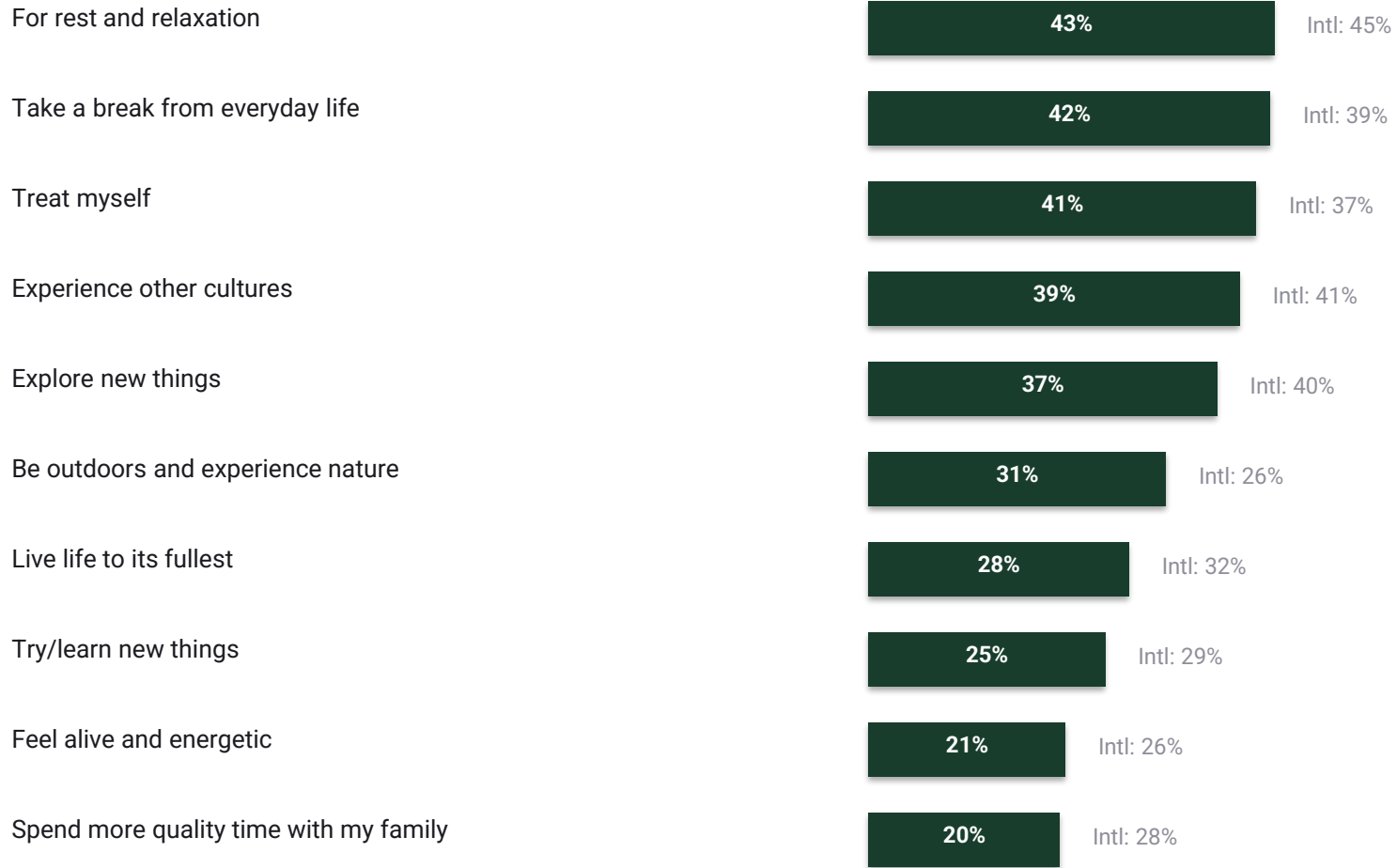


Barriers



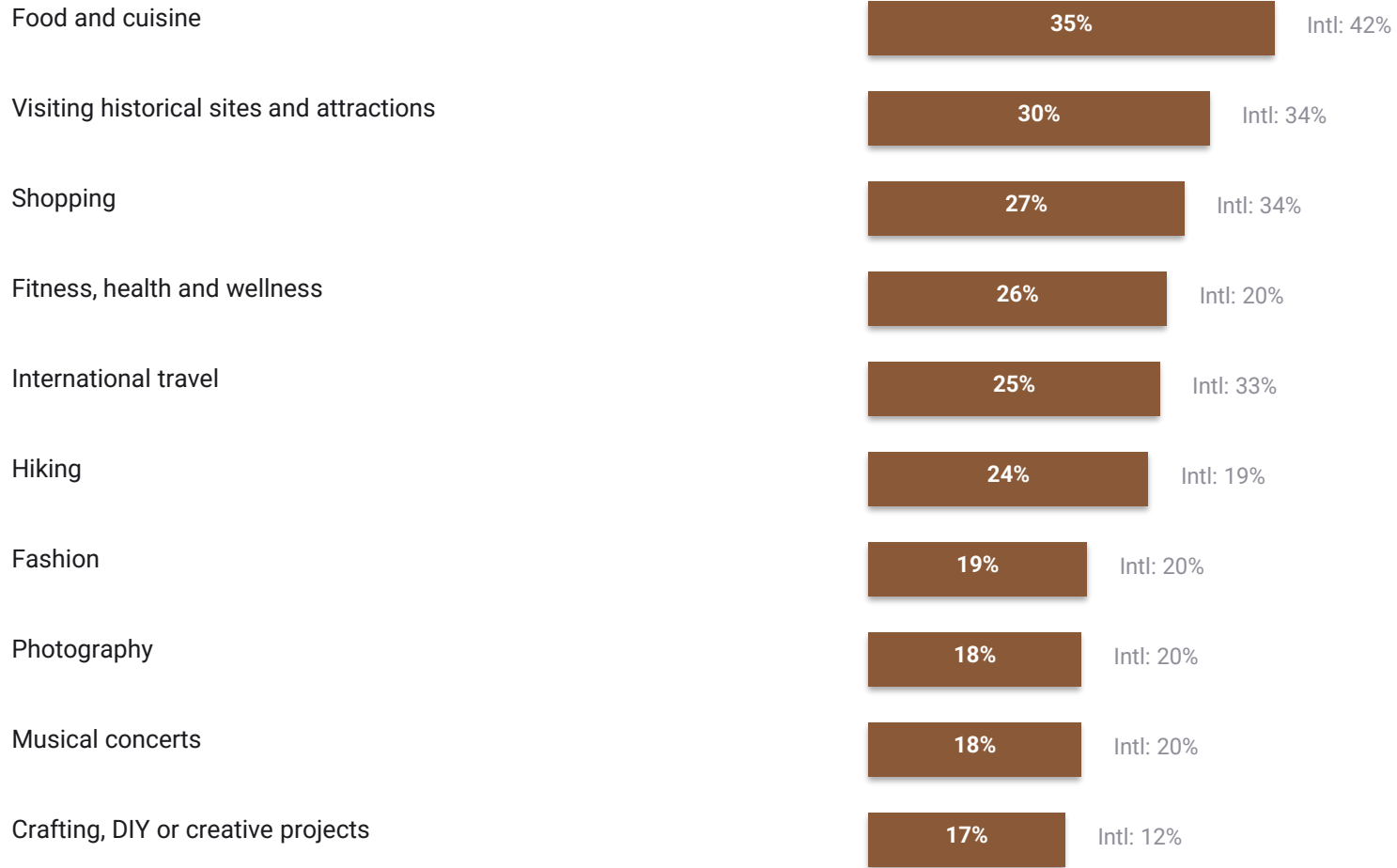
Travel Motivations

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

BRAZIL

Source Market Analysis | Tennessee

#5 by Spending | #10 by Visits

TENNESSEE
SOUNDS PERFECT

TravelSouth
All Y'all Are Welcome USA

Brazil | Key Findings

- 1 2026 Tennessee projected spending:** \$45.3M (+5.6% YOY). Projected visitors: 13.8K (+2.2% YOY). Ranks #5 by spending and #10 by visits among Tennessee 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%) exceeds 2015-2019 (0%).
- 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

\$45.3M

2026 Tennessee Spending

+5.6% YOY vs. 2025

13.8K

2026 Tennessee Visitors

+2.2% YOY vs. 2025

\$8.4B

2026 USA Spending

+7.2% YOY vs. 2025

3M

2026 USA Visitors

+3.8% YOY vs. 2025

\$42.9M

2025 Tennessee Spending

+14.1% YOY vs. 2024

13.5K

2025 Tennessee Visitors

-0.7% 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

0%

Spending

-2.1%

Visits

2023-2027 PROJECTED CAGR

15%

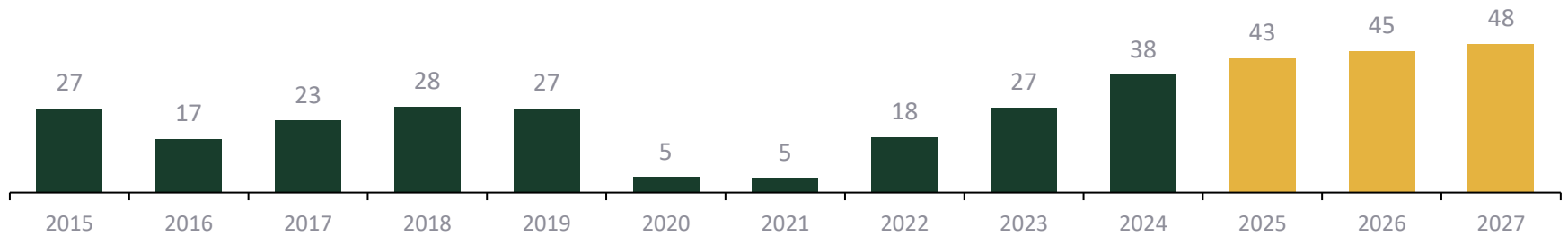
Spending

6.6%

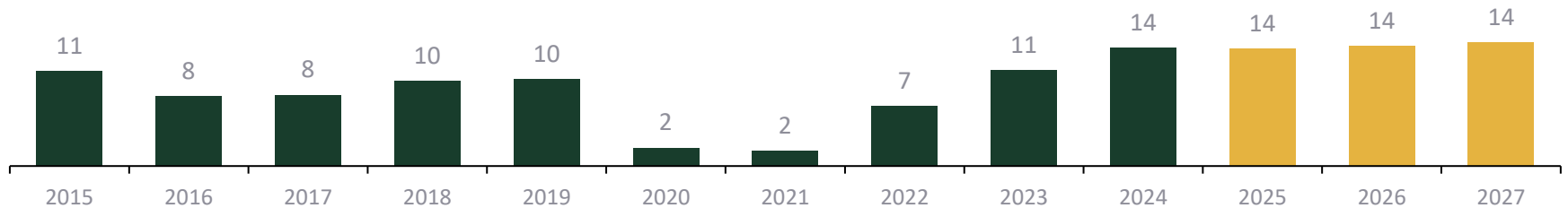
Visits

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%

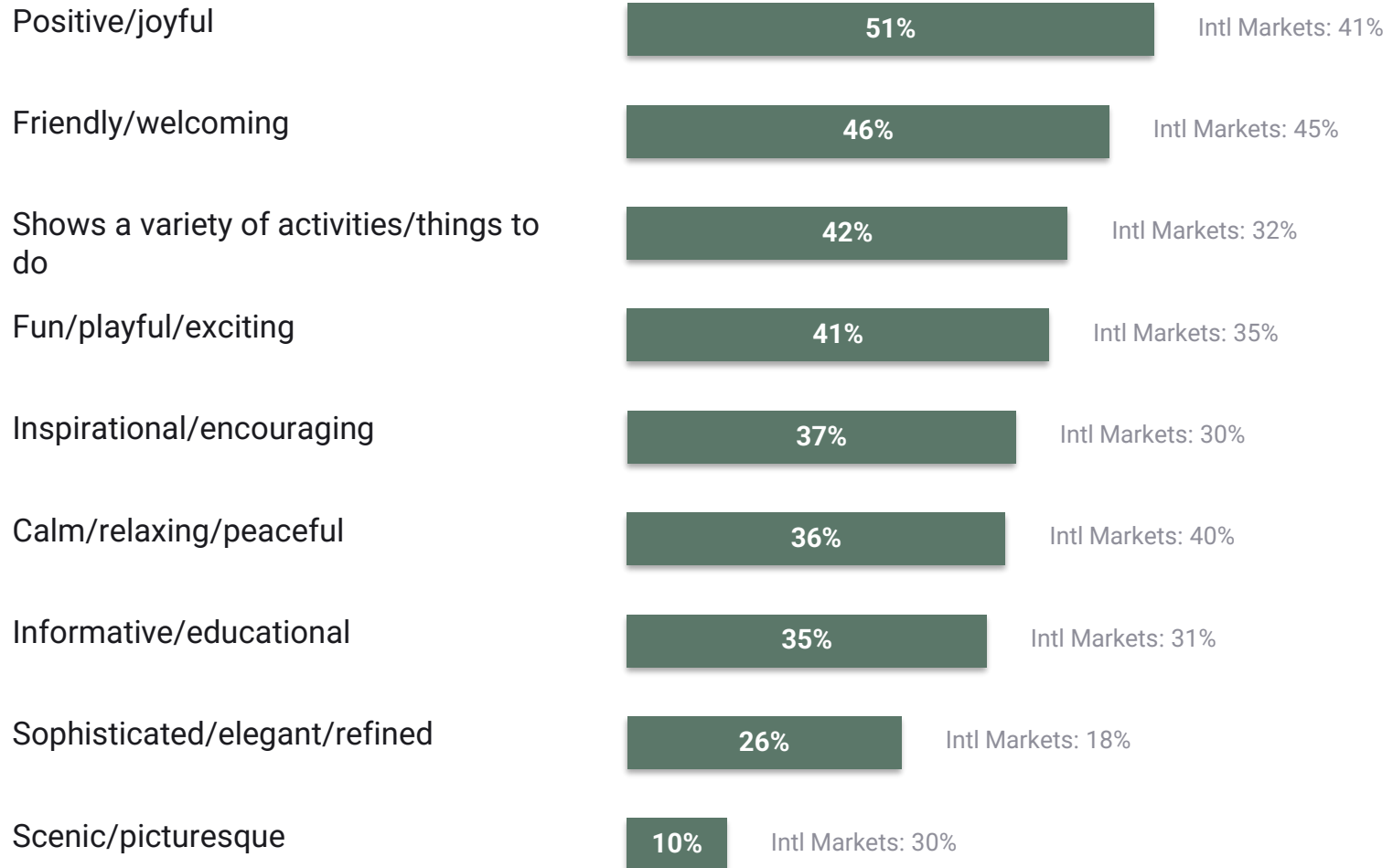
49%

Likely to Visit (5yr)

Intl Markets: 41%

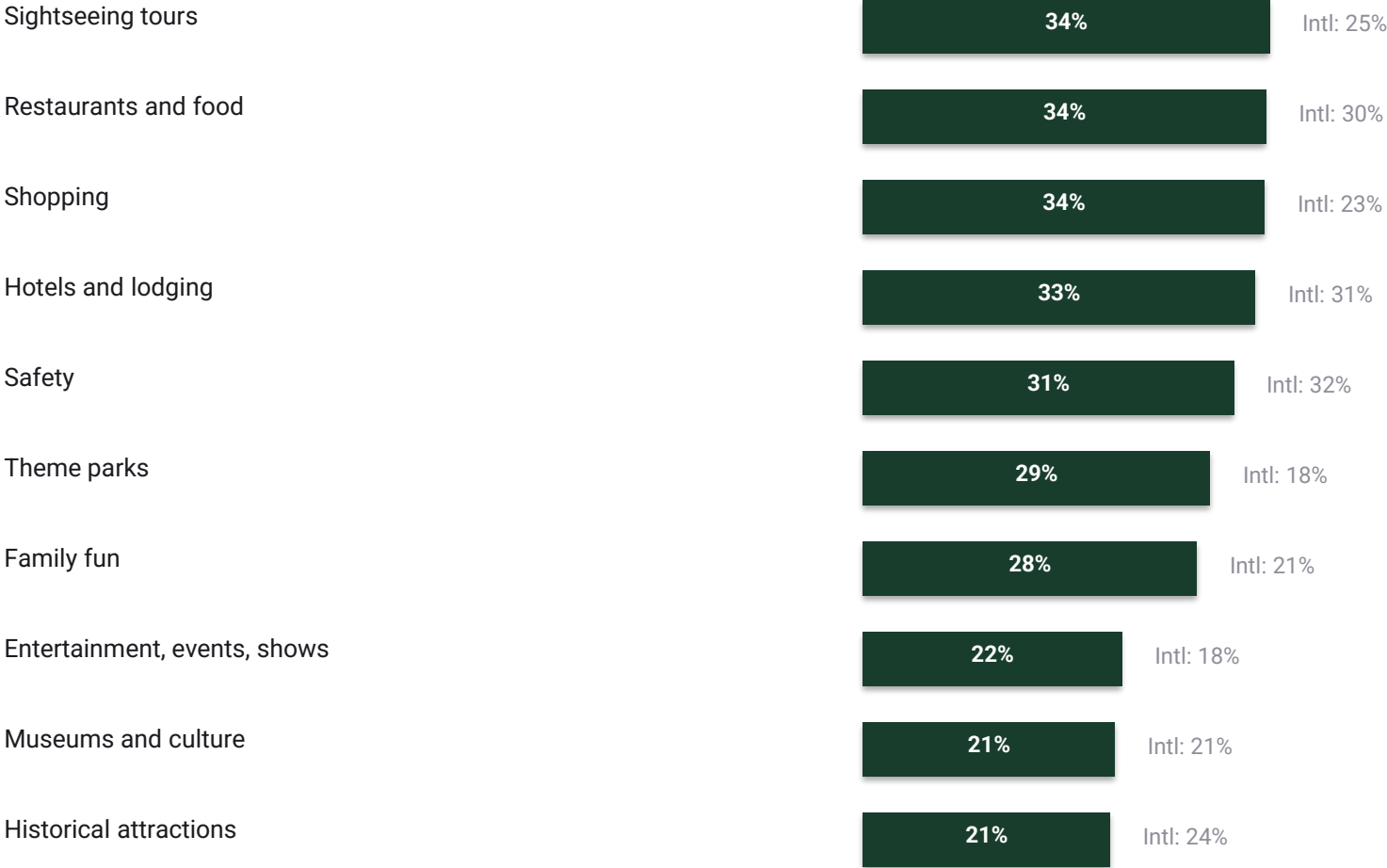
Desired Travel Promotion Tone

Brazil



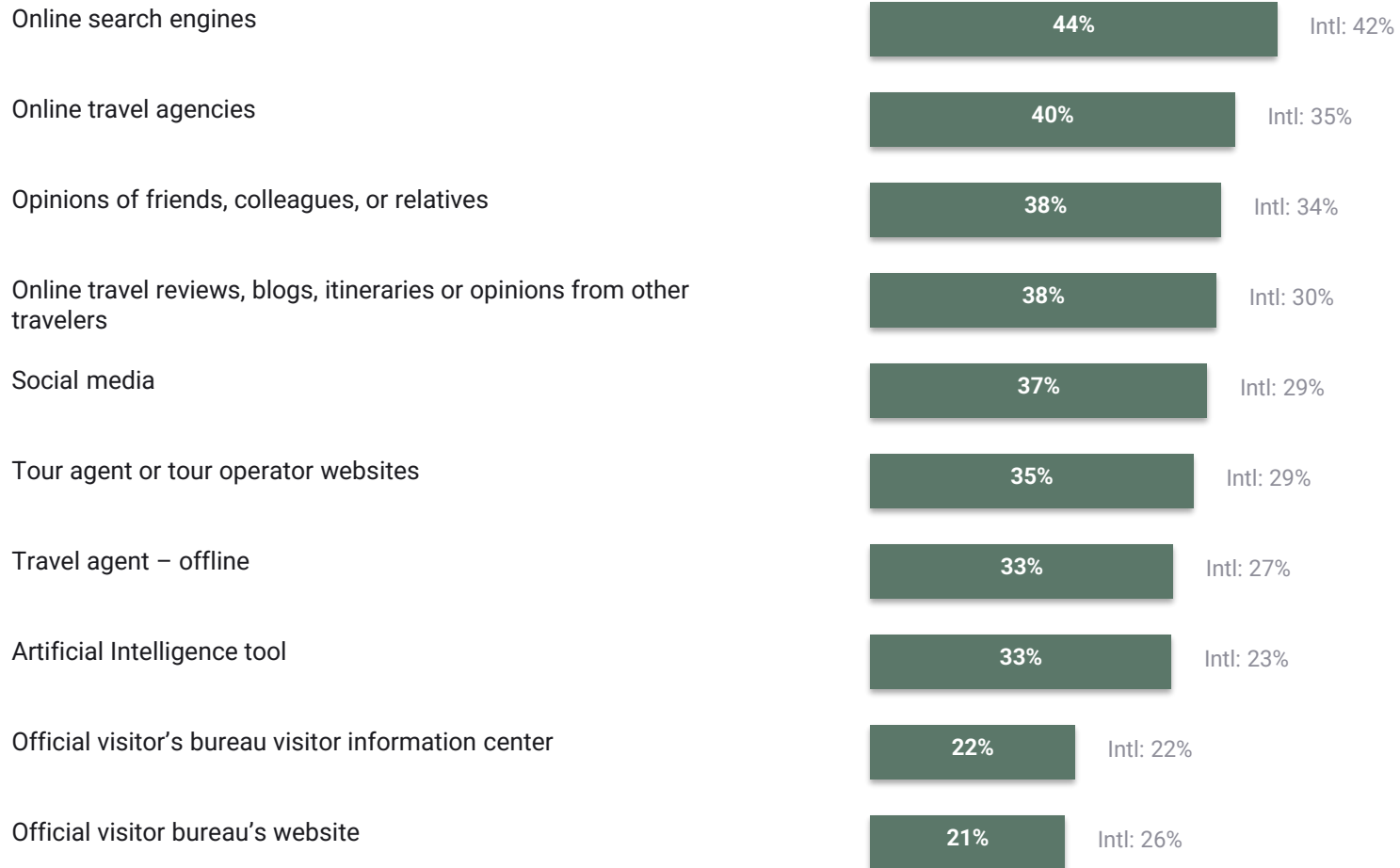
Top Information Sources

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

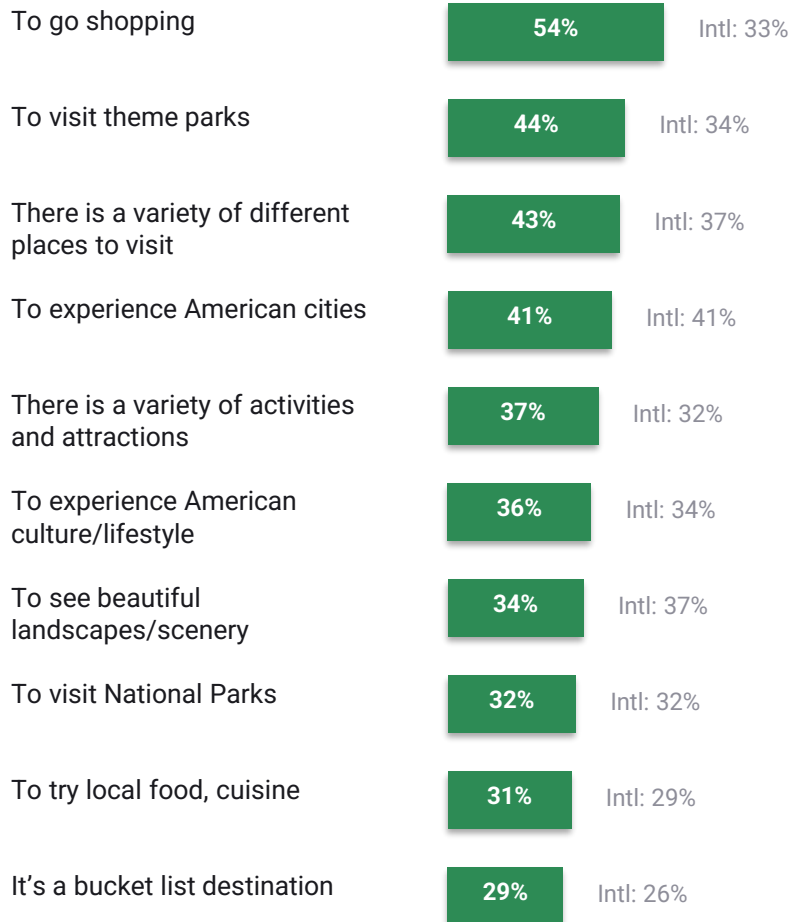
Total

Intl: \$5,049

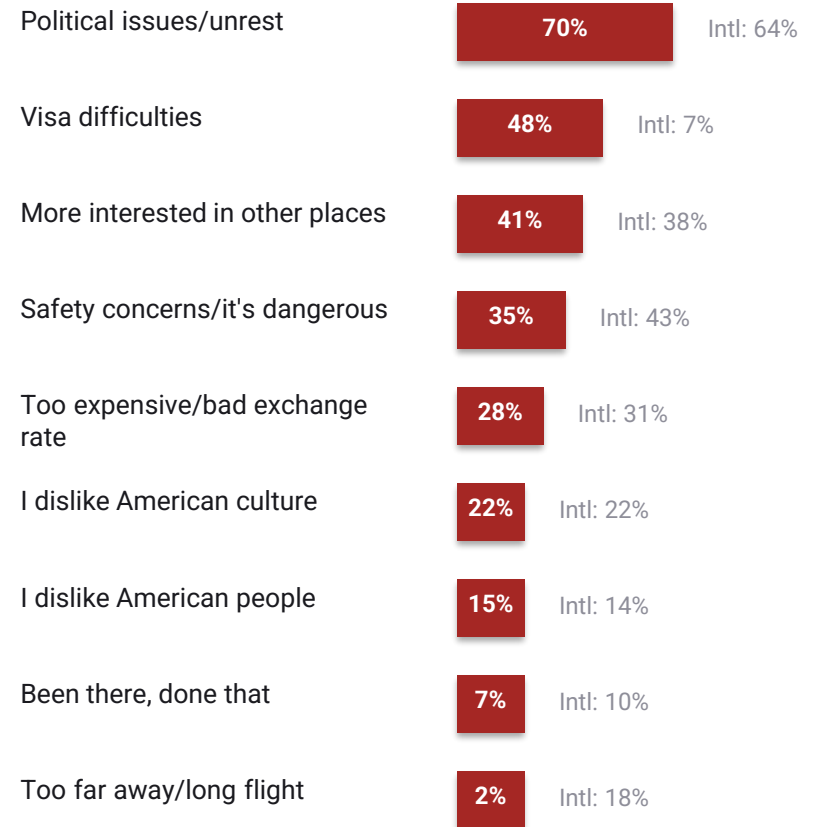
Enablers & Barriers to Visiting

Brazil

Enablers

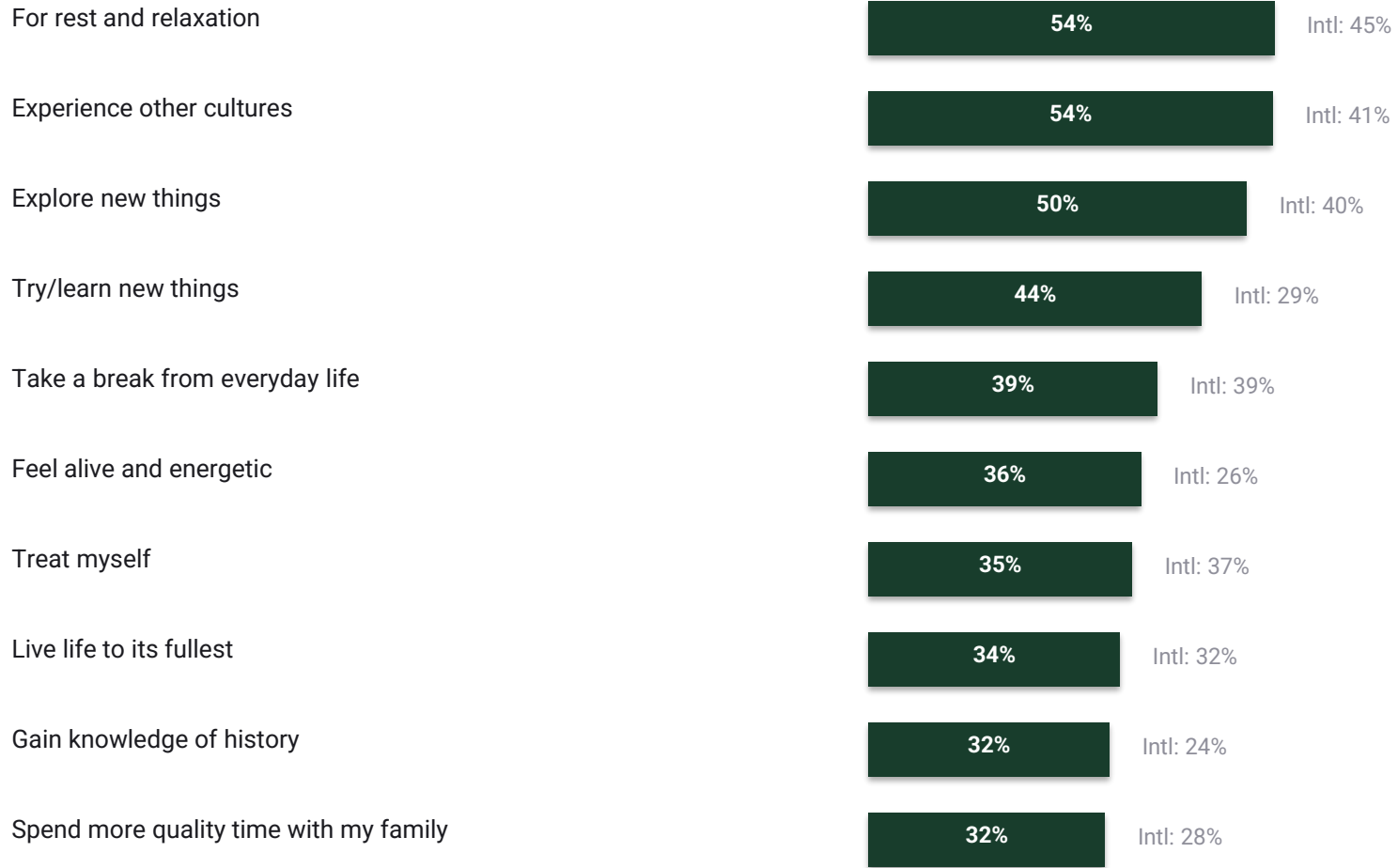


Barriers



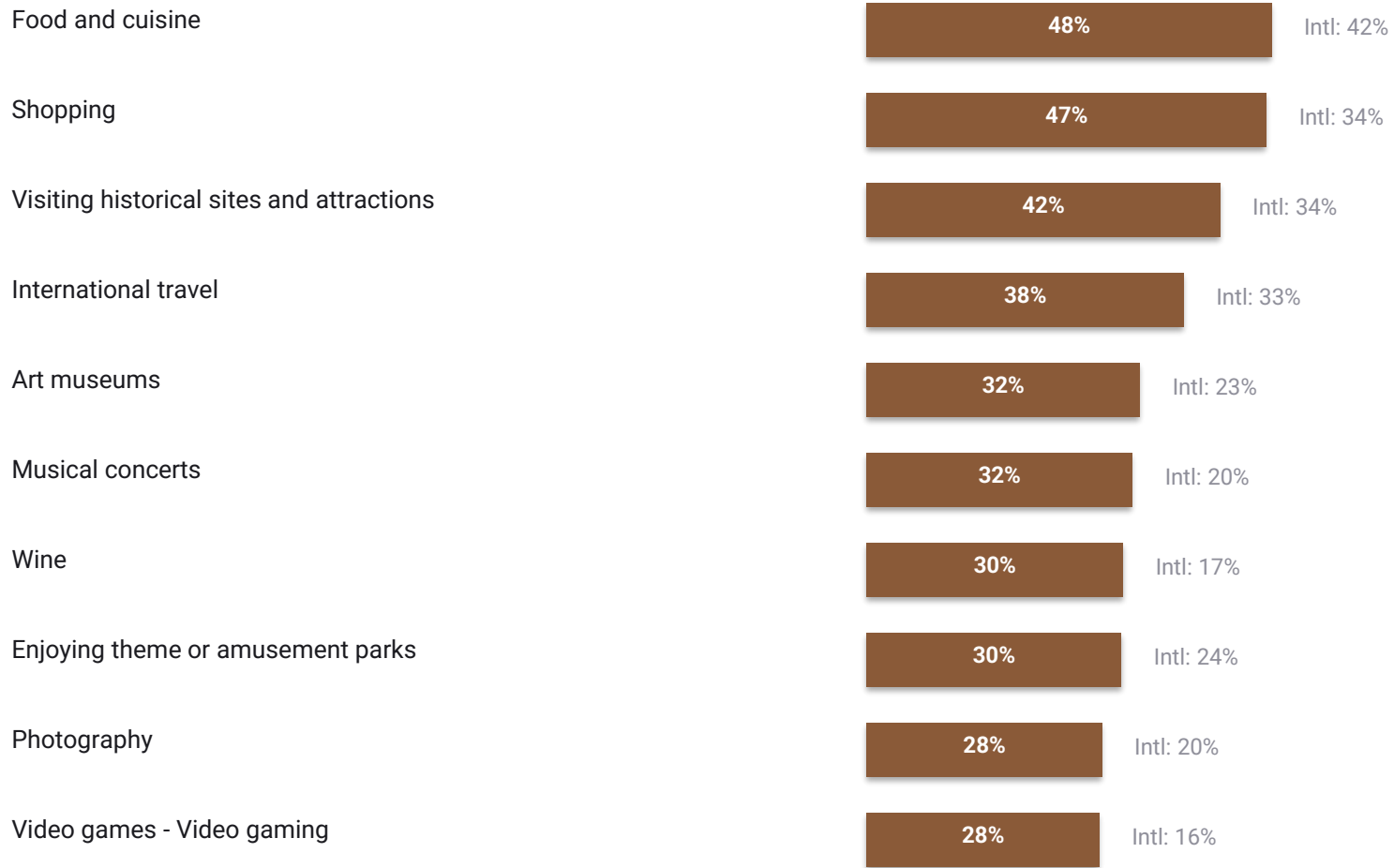
Travel Motivations

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

TENNESSEE

SOUNDS PERFECT

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.