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International Visitor Profile

# Key Findings

- 1 2026 projected spending:** \$1.5B (+6.1% YOY). Projected visitors: 857.2K (+4.4% YOY).
- 2 Top 10 Source Markets by Spending:** Canada (\$184.3M), UK + Ireland (\$128.2M), India (\$126.3M), DACH Region (\$96.1M), China (\$91.9M), Turkey (\$62.8M), United Arab Emirates (\$41.0M), Philippines (\$38.9M), Israel (\$37.8M), Nordics (\$36.9M).
- 3 Top 5 Growth Markets (Spending YOY):** Taiwan (+17.0%), Singapore (+15.4%), Bulgaria (+15.3%), Philippines (+14.1%), Israel (+14.0%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-11.1%).
- 5** Canada leads by spending (\$184.3M). Canada leads by visits (306.7K).
- 6 CAGR:** 2023-2027 projected spending CAGR (7.4%) exceeds 2015-2019 (3.6%).
- 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%)

# Virginia

**\$1.5B**

2026 Projected Spending

**+6.1% YOY** vs. 2025

**\$1.3B**

2026 Overseas Spending

**+5.8% YOY** vs. 2025

**\$1.4B**

2025 Projected Spending

**-2.3% YOY** vs. 2024

**\$1.2B**

2025 Overseas Spending

**+1.9% YOY** vs. 2024

**857.2K**

2026 Projected Visitors

**+4.4% YOY** vs. 2025

**528.4K**

2026 Overseas Visitors

**+3.2% YOY** vs. 2025

**820.7K**

2025 Projected Visitors

**-12.4% YOY** vs. 2024

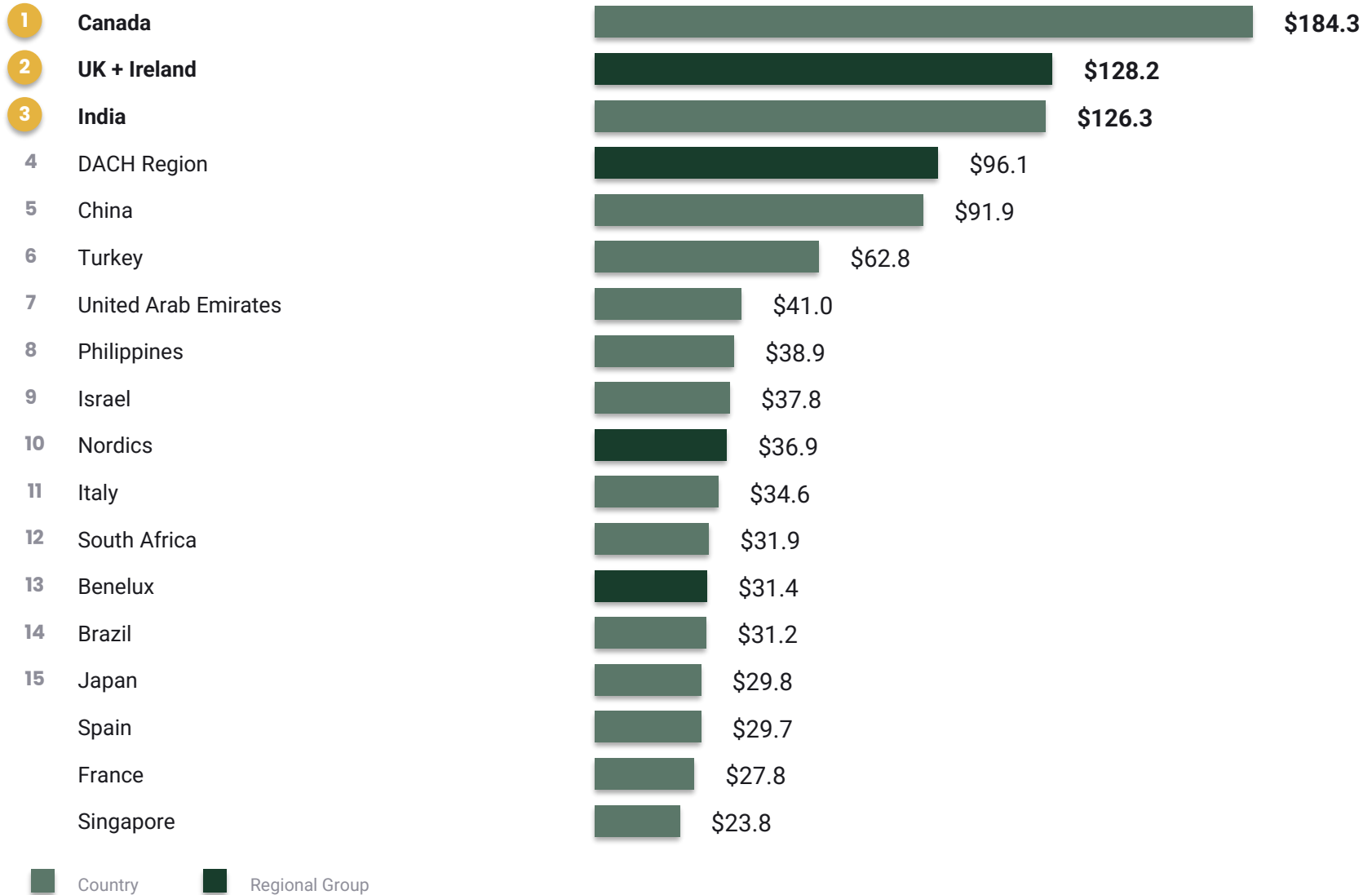
**512.1K**

2025 Overseas Visitors

**-3.0% YOY** vs. 2024

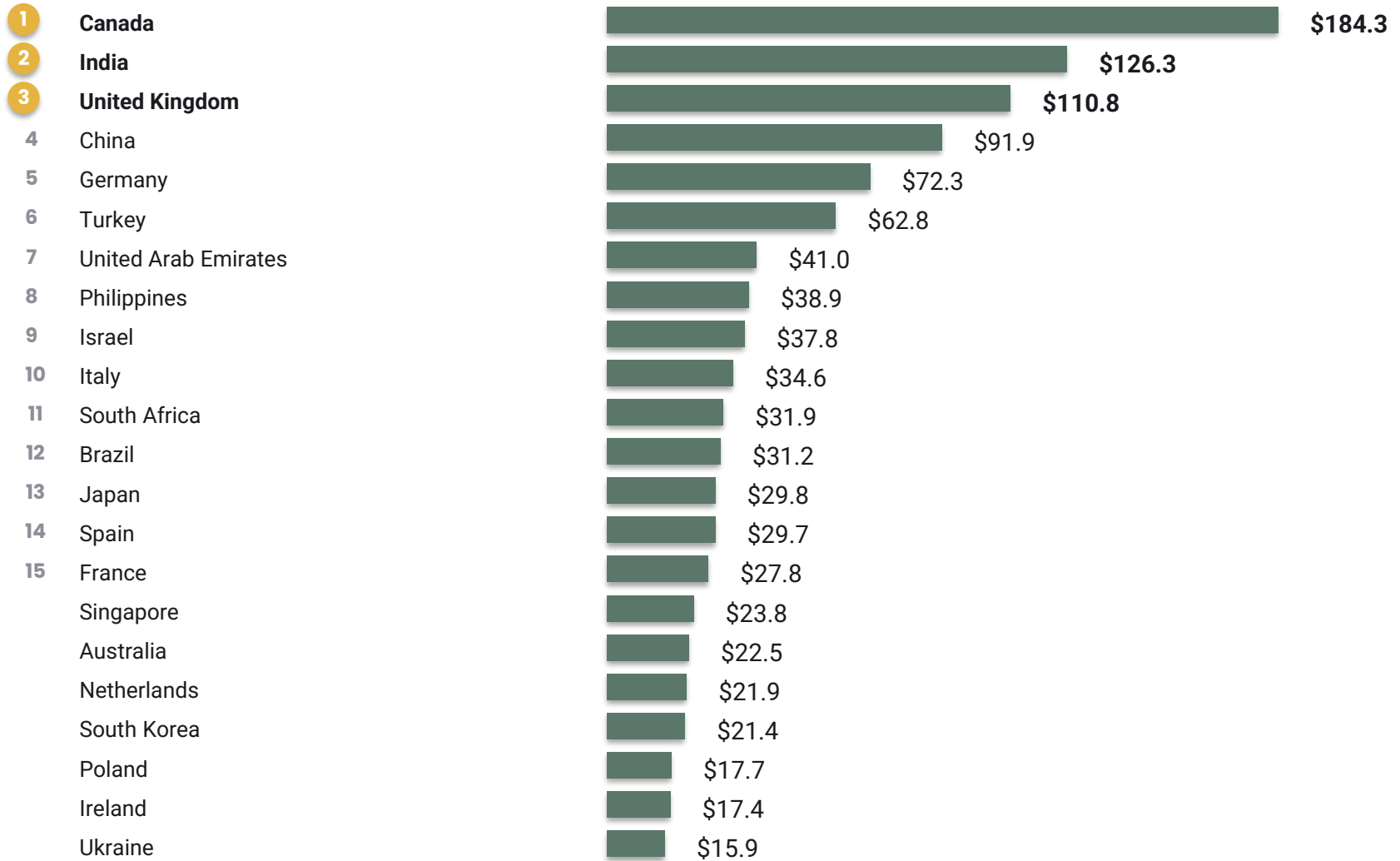
# Top Source Markets | 2026 Projections

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	\$184.3	306.7	+8.5%	+6.8%
2	India	\$126.3	67.3	+7.3%	+2.6%
3	United Kingdom	\$110.8	61.5	+1.6%	+3.0%
4	China	\$91.9	23.6	+4.9%	+4.3%
5	Germany	\$72.3	40.0	+8.1%	+3.8%
6	Turkey	\$62.8	6.6	+0.2%	+0.7%
7	United Arab Emirates	\$41.0	3.4	+3.5%	+9.4%
8	Philippines	\$38.9	10.9	+14.1%	+8.6%
9	Israel	\$37.8	12.4	+14.0%	+2.4%
10	Italy	\$34.6	18.1	+6.9%	+4.4%
11	South Africa	\$31.9	3.4	+9.9%	+6.0%
12	Brazil	\$31.2	7.2	+5.8%	+2.2%
13	Japan	\$29.8	15.1	+6.9%	+7.7%
14	Spain	\$29.7	12.8	+12.8%	+5.0%
15	France	\$27.8	19.7	+3.7%	+1.6%
16	Singapore	\$23.8	4.7	+15.4%	+8.4%
17	Australia	\$22.5	9.6	+5.4%	+3.2%
18	Netherlands	\$21.9	11.2	+8.2%	+5.2%
19	South Korea	\$21.4	15.3	+4.5%	+5.1%
20	Poland	\$17.7	6.1	+1.4%	-3.0%
21	Ireland	\$17.4	8.4	+5.1%	+3.7%
22	Ukraine	\$15.9	1.4	+6.4%	+1.2%

# % Change | 2025 Projections vs. 2024

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

#	Market	Spending %Δ	Visits %Δ
1	Canada	-24.9%	-26.2%
2	India	-5.2%	-5.2%
3	United Kingdom	+15.1%	+2.3%
4	China	+6.1%	-2.8%
5	Germany	+6.2%	-11.4%
6	Turkey	+23.4%	+5.2%
7	United Arab Emirates	+3.9%	-2.6%
8	Philippines	-9.4%	-15.3%
9	Israel	-5.7%	+13.0%
10	Italy	+12.1%	+4.5%
11	South Africa	-7.6%	-6.6%
12	Brazil	+16.5%	+2.9%
13	Japan	+10.9%	+5.1%
14	Spain	+13.0%	+2.1%
15	France	-1.5%	-5.5%
16	Singapore	-2.6%	-7.0%
17	Australia	-14.2%	-5.1%
18	Netherlands	+13.0%	-7.3%
19	South Korea	-14.6%	-3.8%
20	Poland	-1.5%	+5.0%
21	Ireland	-2.7%	-0.3%
22	Ukraine	+38.2%	+7.1%

 Decline  Growth

# Growth Trajectory

2015-2019 CAGR

**3.6%**

Spending

**1.4%**

Visits

2023-2027 PROJECTED CAGR

**7.4%**

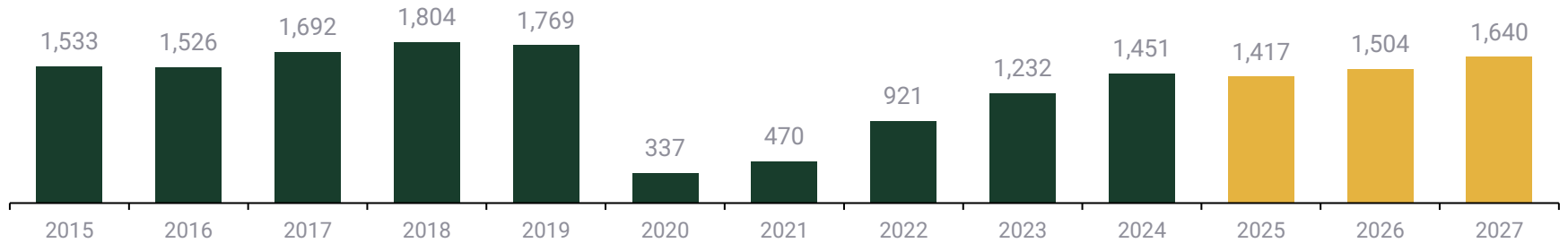
Spending

**1.5%**

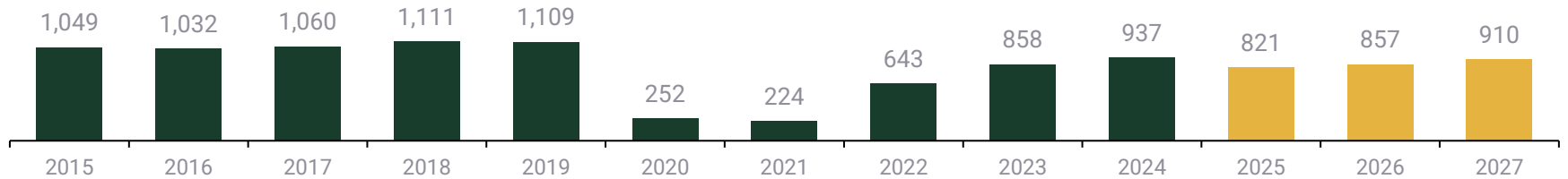
Visits

CAGR is Compound Annual Growth Rate.

## Spending (\$M)



## Visits (K)



■ Historic    ■ Forecast

# Macro Context

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

## Canada

**1.5%**

GDP % Change

**1.37**

CAD/USD

## India

**6.2%**

GDP % Change

**90.92**

INR/USD

## United Kingdom

**1.3%**

GDP % Change

**1.35**

GBP/USD

## China

**4.2%**

GDP % Change

**6.84**

CNY/USD

## Germany

**0.9%**

GDP % Change

**1.18**

EUR/USD

## Turkey

**3.7%**

GDP % Change

—

## United Arab Emirates

**5.0%**

GDP % Change

—

## Philippines

**5.7%**

GDP % Change

—

## Israel

**3.9%**

GDP % Change

—

## Italy

**0.8%**

GDP % Change

**1.18**

EUR/USD

# Visitor Perceptions | The American South

International Markets

**67%**

**Familiarity**

**75%**

**Appeal**

**29%**

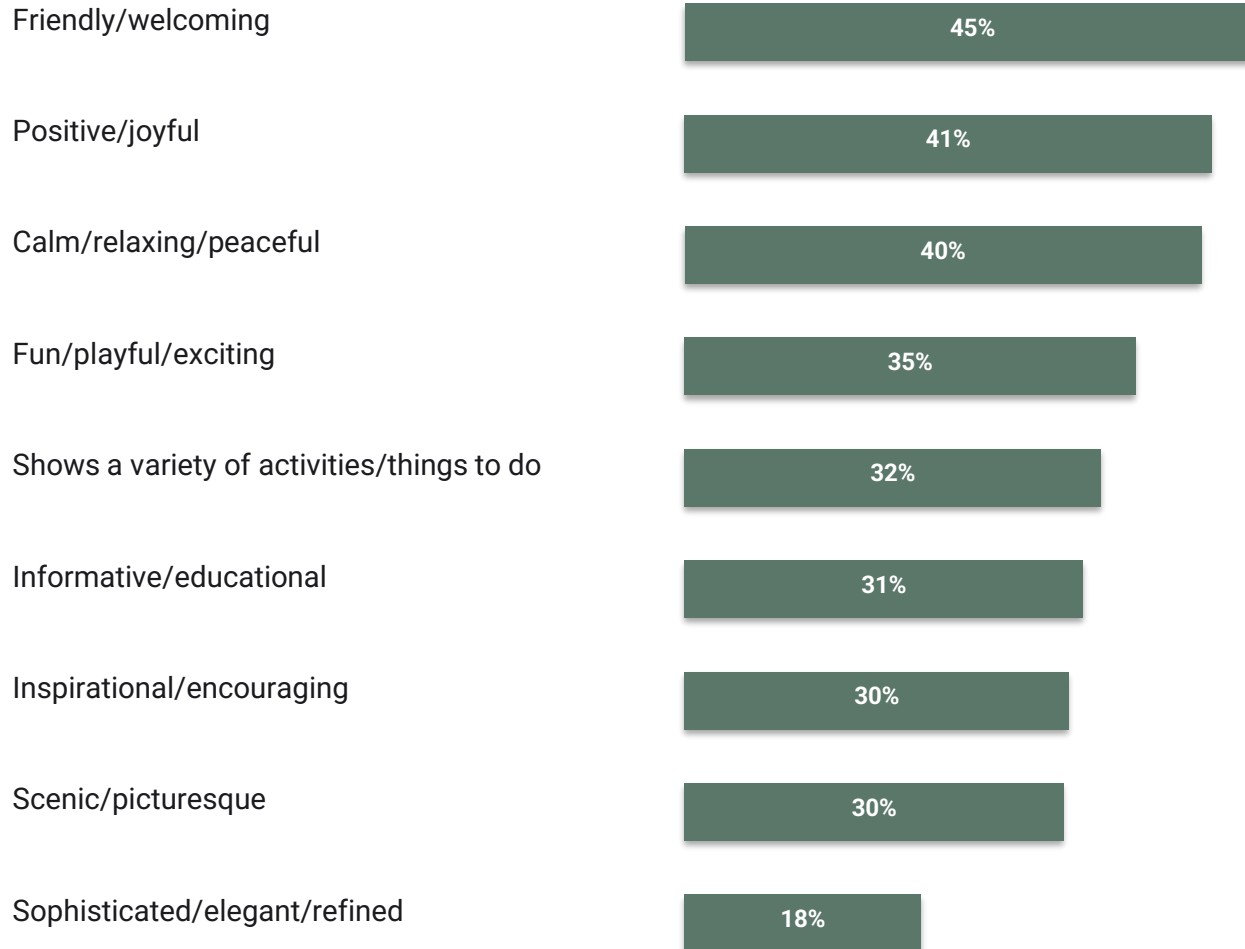
**Promotional Buzz**

**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**

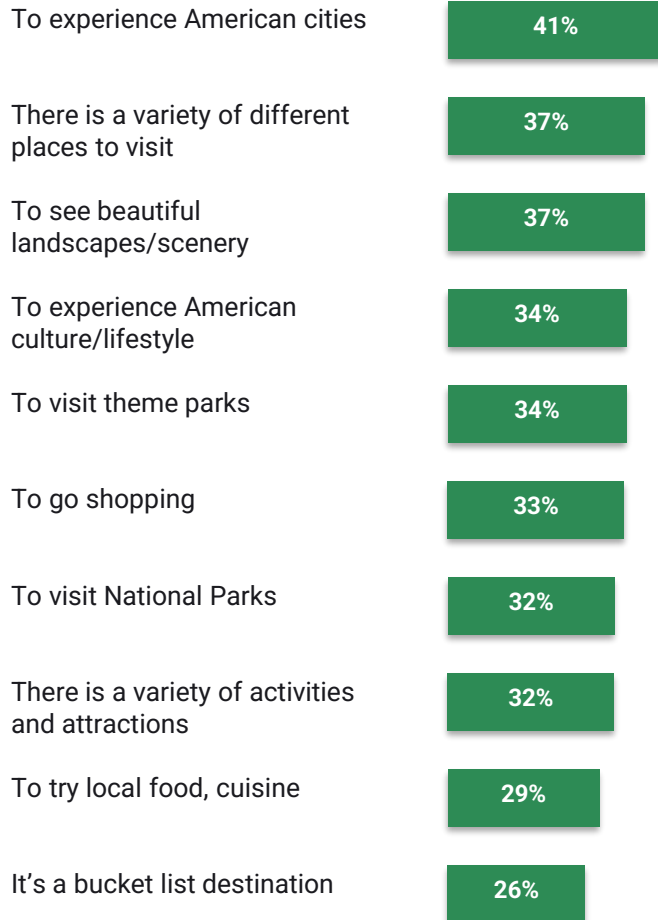
Total

Intl: \$5,049

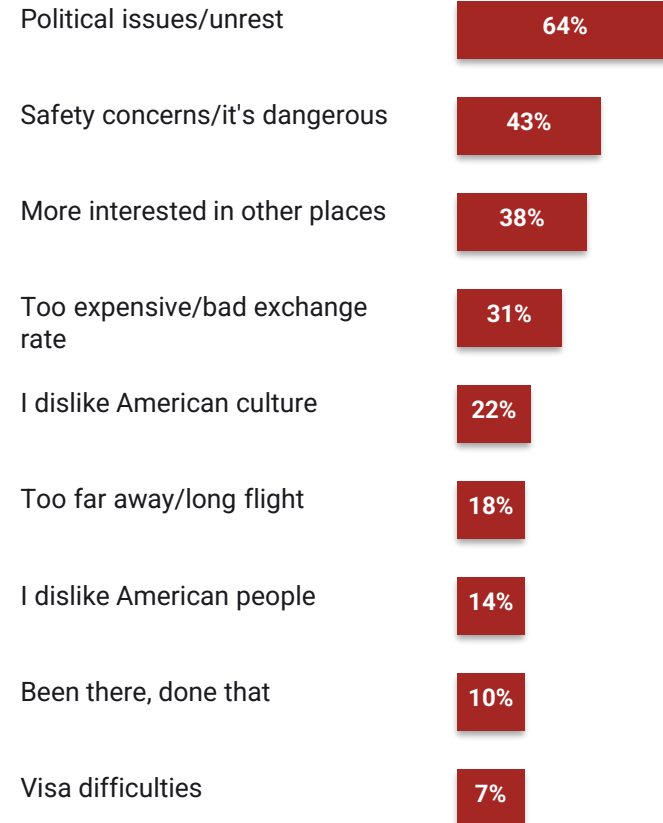
# Enablers & Barriers to Visiting

International Markets

## Enablers

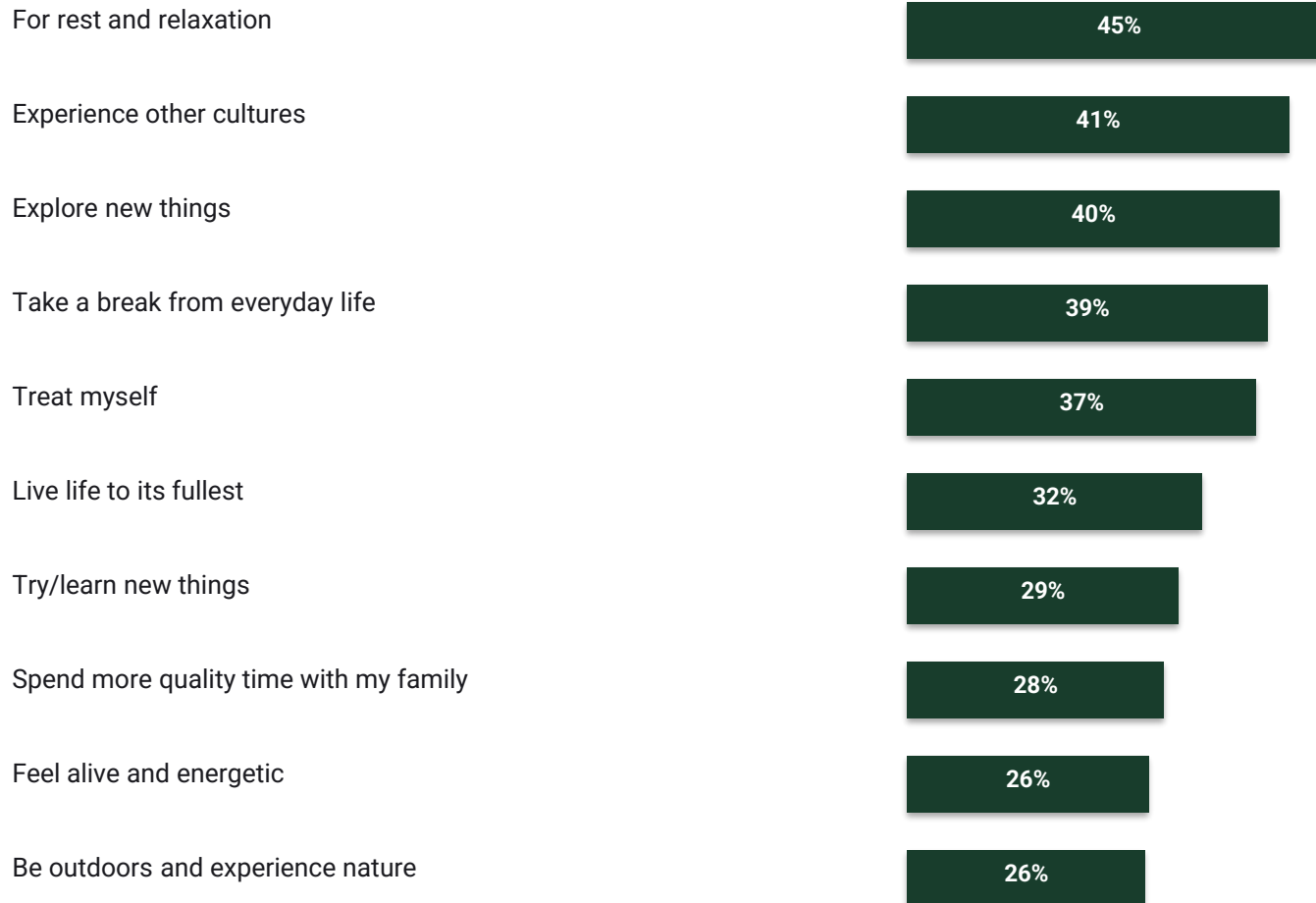


## Barriers



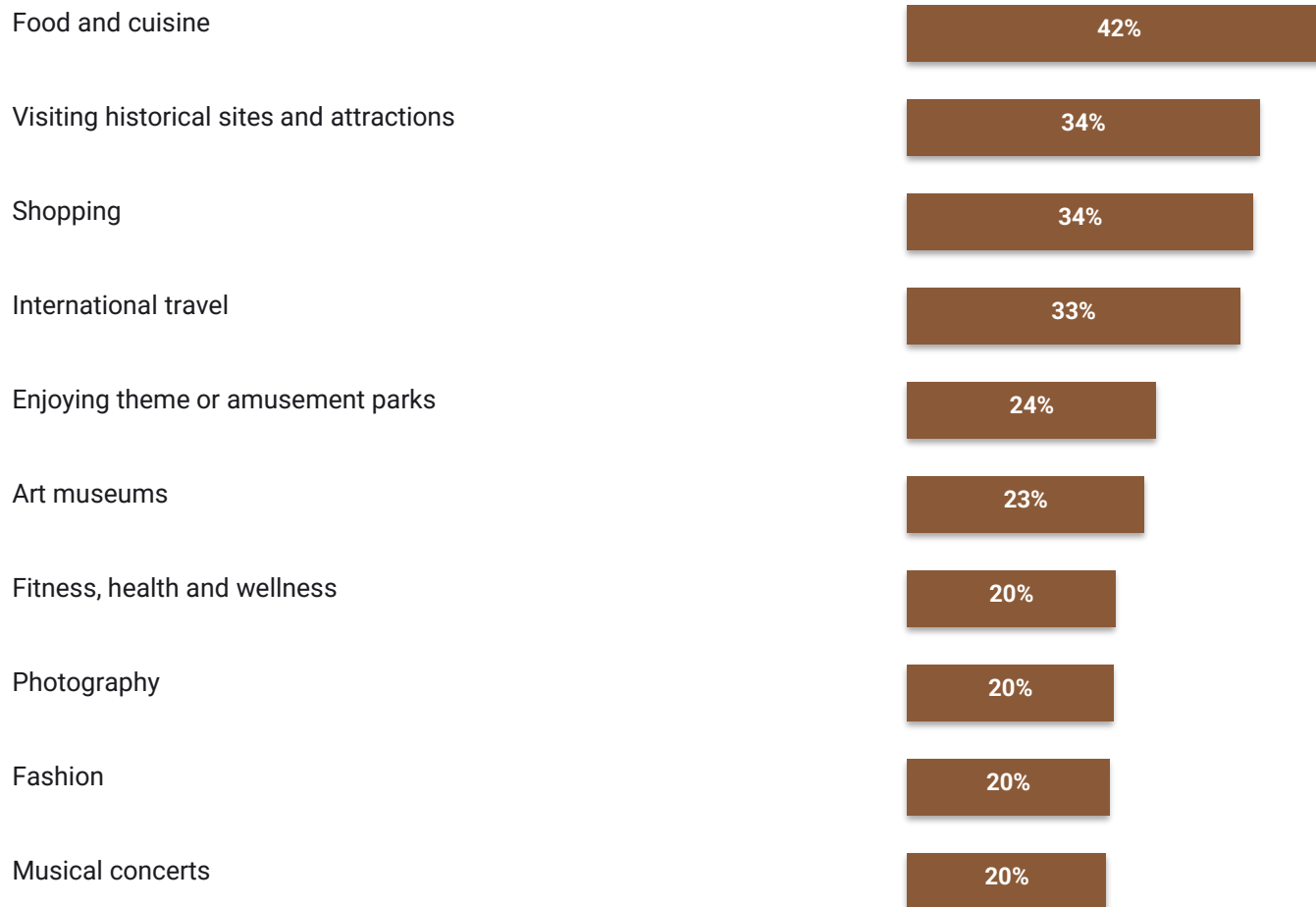
# Travel Motivations

## International Markets



# Hobbies & Passions

International Markets



# Travel Trends & Outlook

## International Markets

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

**54%**



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

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# CANADA

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Source Market Analysis | Virginia

**#1 by Spending | #1 by Visits**

VIRGINIA  
IS FOR  
LOVERS®

TravelSouth  
All Y'all Are Welcome USA

# Canada | Key Findings

- 1 2026 Virginia projected spending:** \$184.3M (+8.5% YOY). Projected visitors: 306.7K (+6.8% YOY). Ranks #1 by spending and #1 by visits among Virginia 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 (0.4%) exceeds 2015-2019 (-5.5%).
- 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

**\$184.3M**

2026 Virginia Spending

**+8.5% YOY** vs. 2025

**306.7K**

2026 Virginia Visitors

**+6.8% YOY** vs. 2025

**\$16.4B**

2026 USA Spending

**+7.6% YOY** vs. 2025

**20.9M**

2026 USA Visitors

**+6.6% YOY** vs. 2025

**\$169.9M**

2025 Virginia Spending

**-24.9% YOY** vs. 2024

**287.1K**

2025 Virginia Visitors

**-26.2% 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

**-5.5%**

Spending

**-1.7%**

Visits

2023-2027 PROJECTED CAGR

**0.4%**

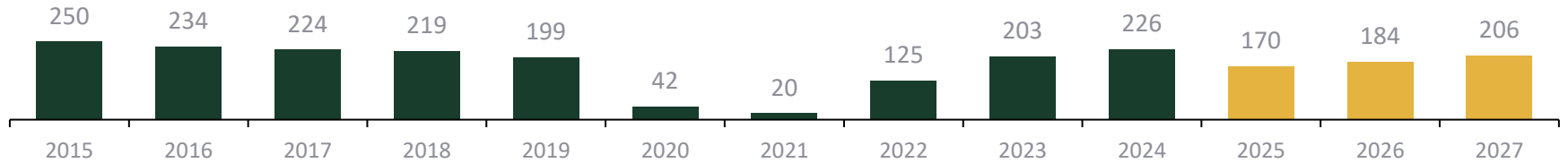
Spending

**-3.4%**

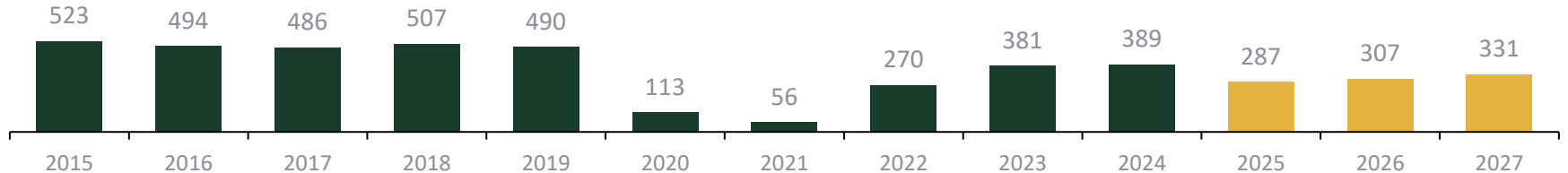
Visits

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%

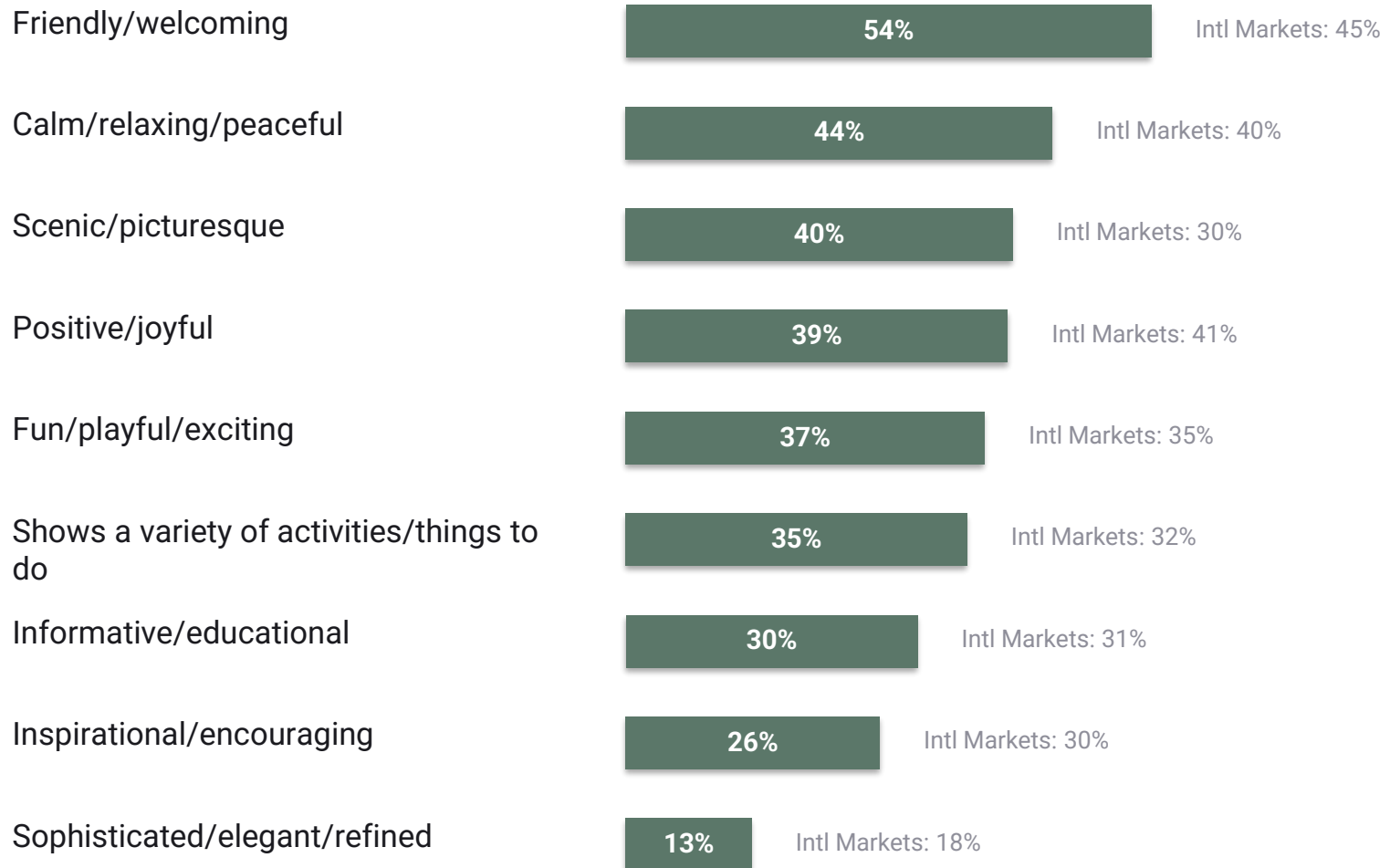
**38%**

**Likely to Visit (5yr)**

Intl Markets: 41%

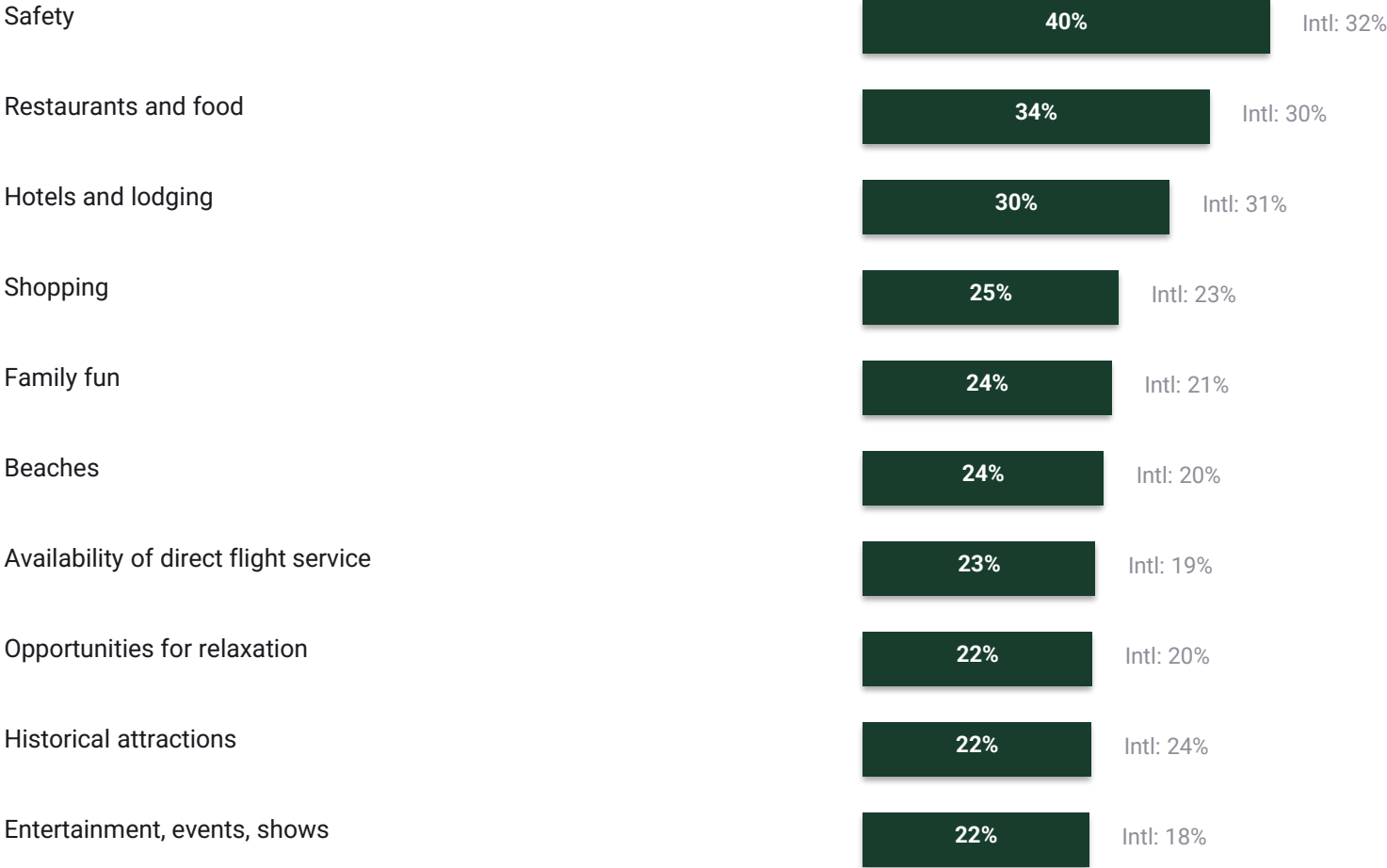
# Desired Travel Promotion Tone

Canada



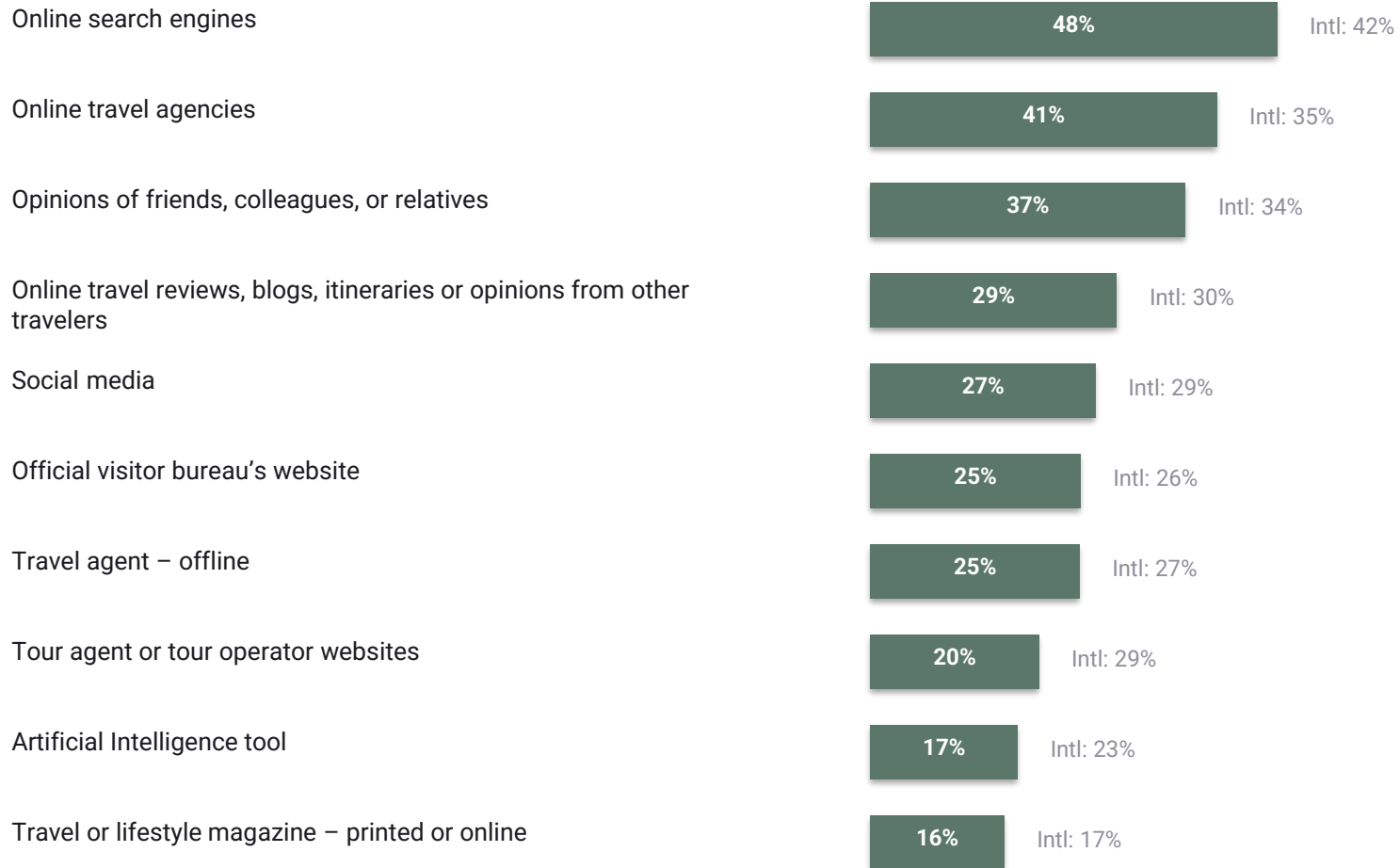
# Top Information Sources

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**

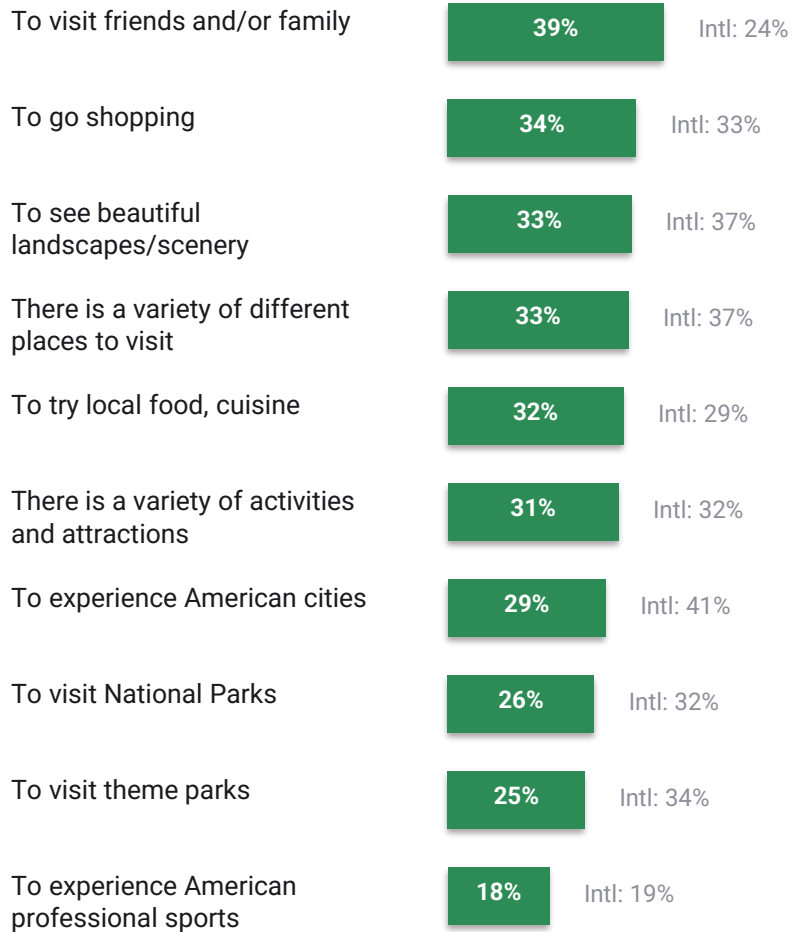
Total

Intl: \$5,049

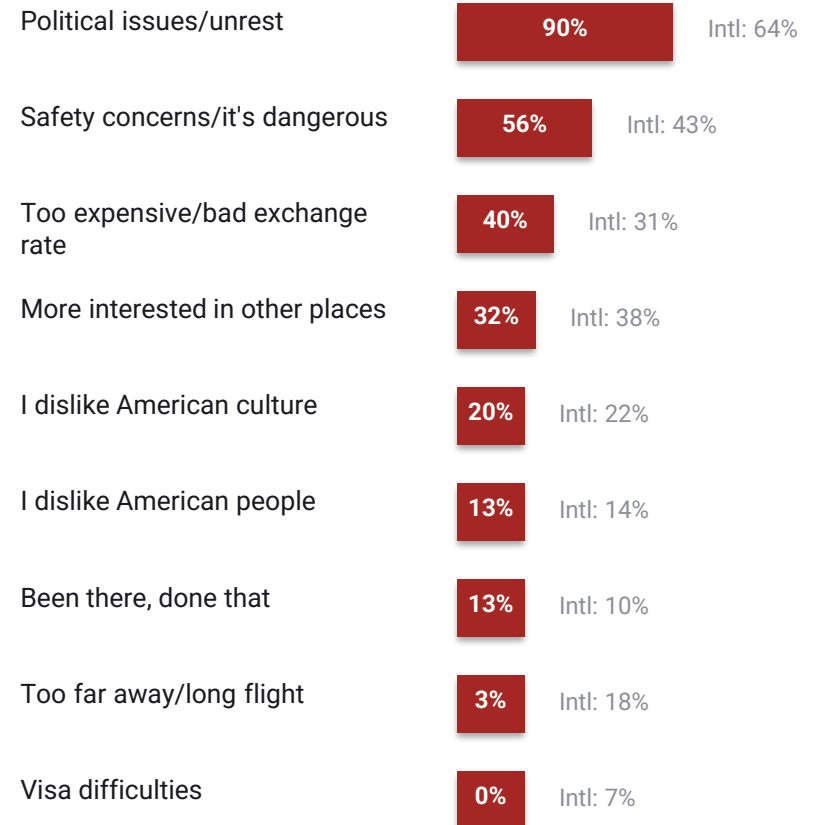
# Enablers & Barriers to Visiting

Canada

## Enablers

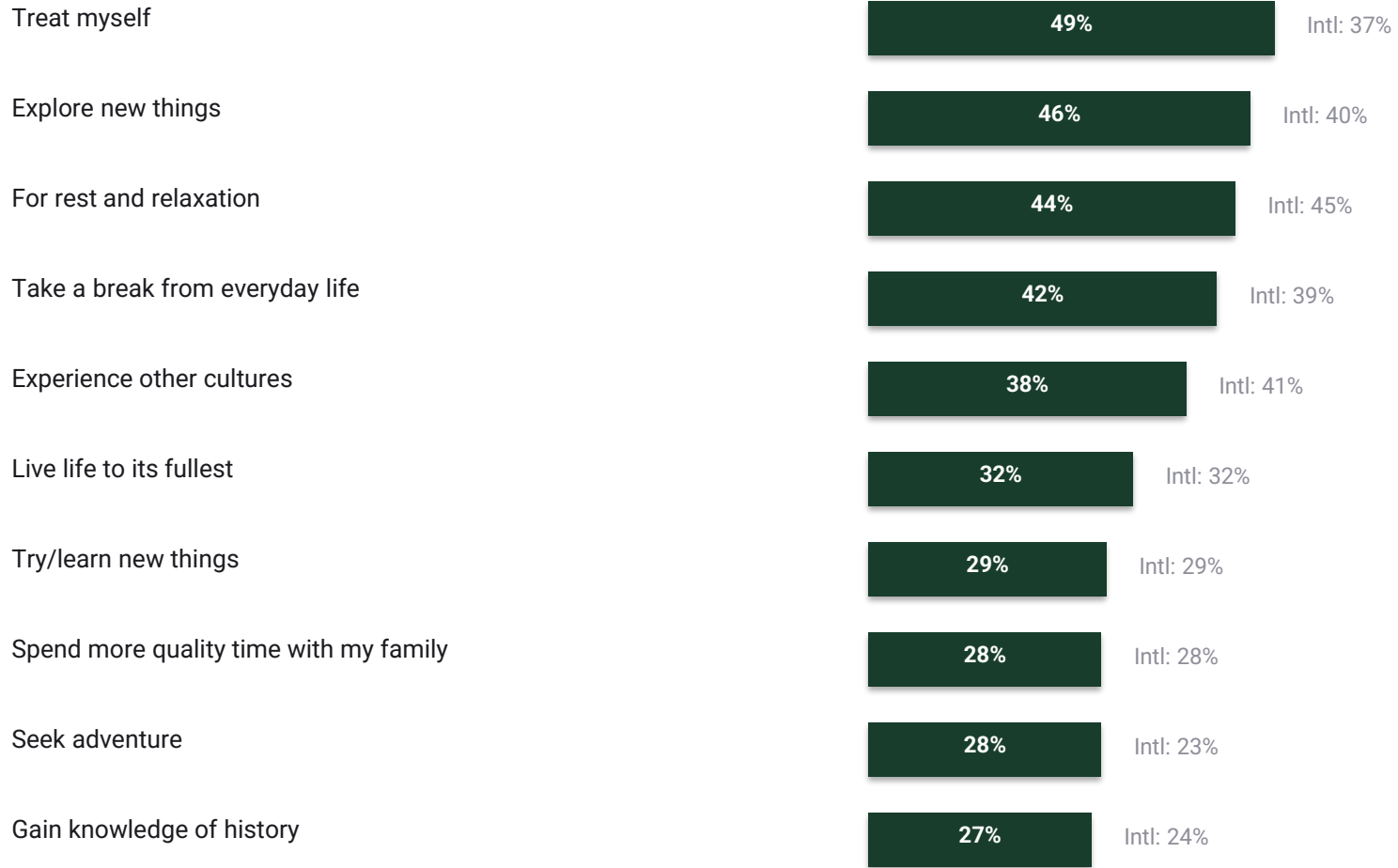


## Barriers



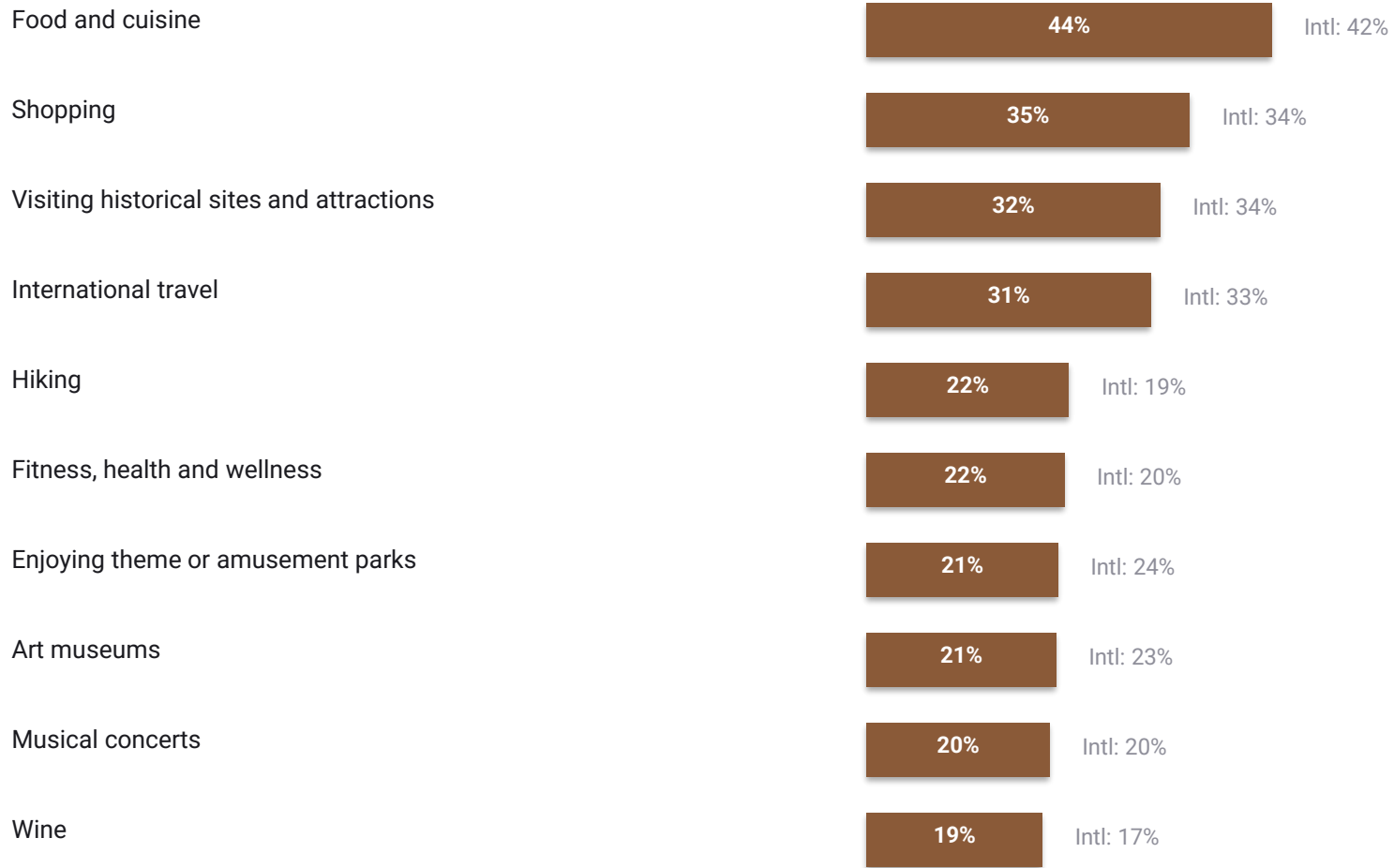
# Travel Motivations

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

# INDIA

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Source Market Analysis | Virginia

#2 by Spending | #2 by Visits

VIRGINIA  
IS FOR  
LOVERS®

TravelSouth  
All Y'all Are Welcome USA

# India | Key Findings

- 1 2026 Virginia projected spending:** \$126.3M (+7.3% YOY). Projected visitors: 67.4K (+2.7% YOY). Ranks #2 by spending and #2 by visits among Virginia 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 (10.8%) exceeds 2015-2019 (3.4%).
- 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

**\$126.3M**

2026 Virginia Spending

**+7.3% YOY** vs. 2025

**67.4K**

2026 Virginia Visitors

**+2.7% YOY** vs. 2025

**\$7.1B**

2026 USA Spending

**+5.7% YOY** vs. 2025

**3.3M**

2026 USA Visitors

**+2.3% YOY** vs. 2025

**\$117.7M**

2025 Virginia Spending

**-5.2% YOY** vs. 2024

**65.6K**

2025 Virginia Visitors

**-5.2% YOY** vs. 2024

**\$6.8B**

2025 USA Spending

**-2.9% YOY** vs. 2024

**3.2M**

2025 USA Visitors

**-3.7% YOY** vs. 2024

# Growth Trajectory

2015-2019 CAGR

**3.4%**

Spending

**4%**

Visits

2023-2027 PROJECTED CAGR

**10.8%**

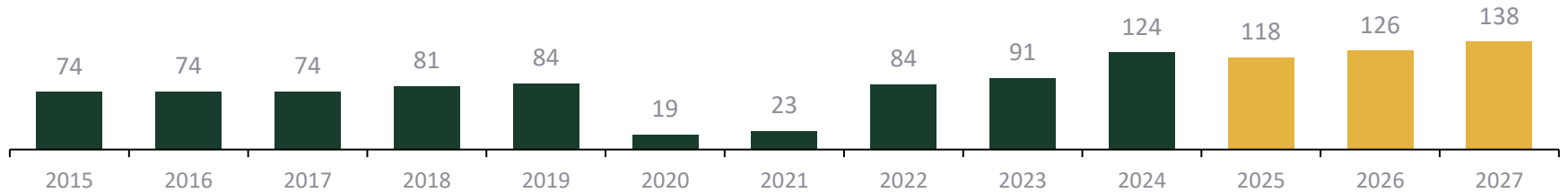
Spending

**7.2%**

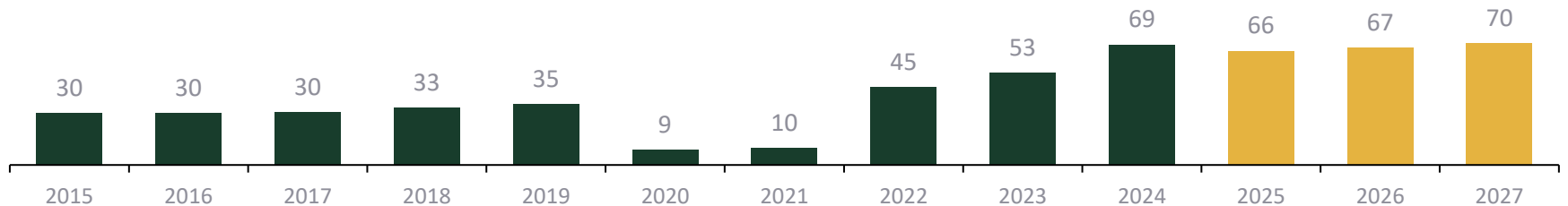
Visits

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%

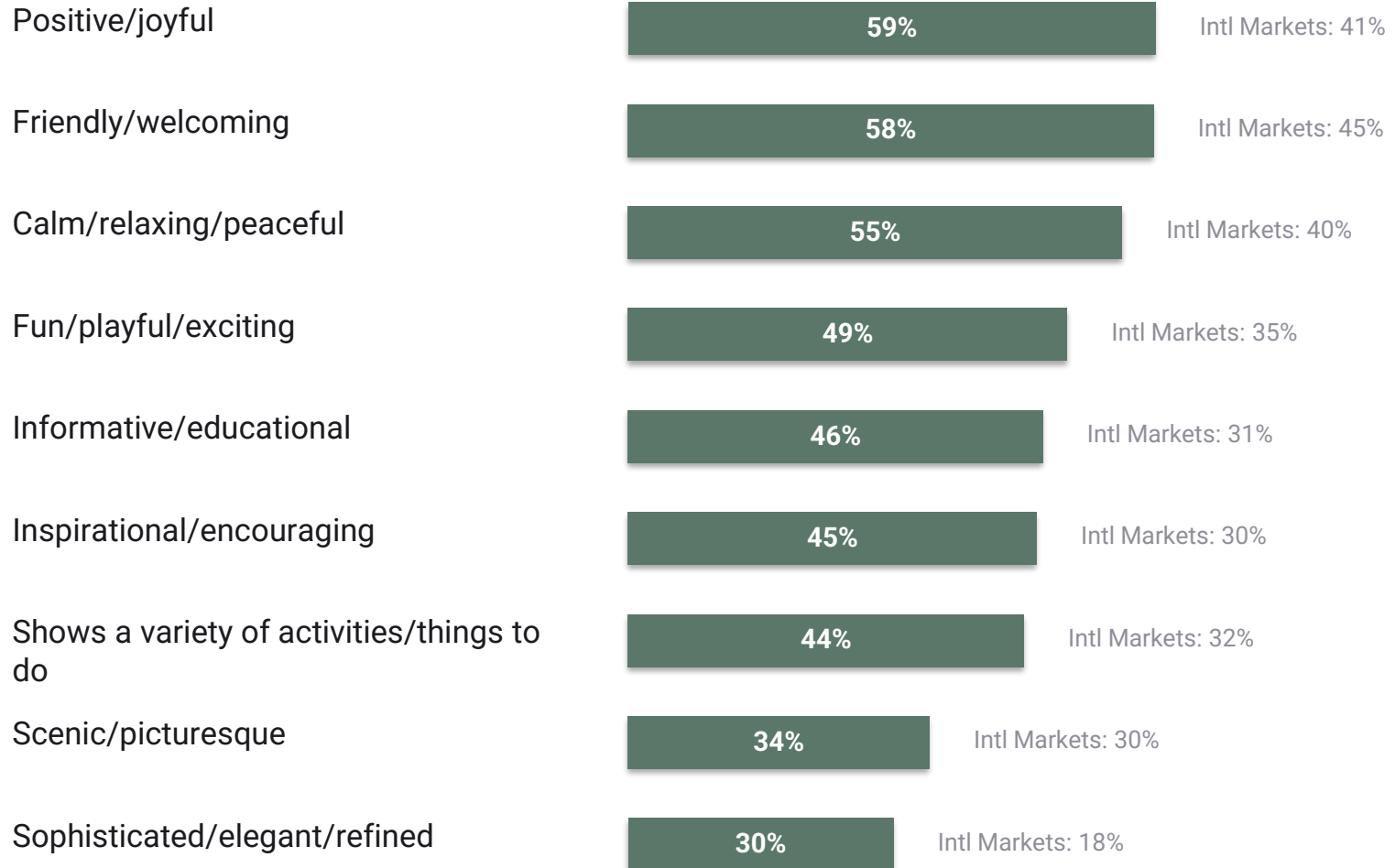
**74%**

**Likely to Visit (5yr)**

Intl Markets: 41%

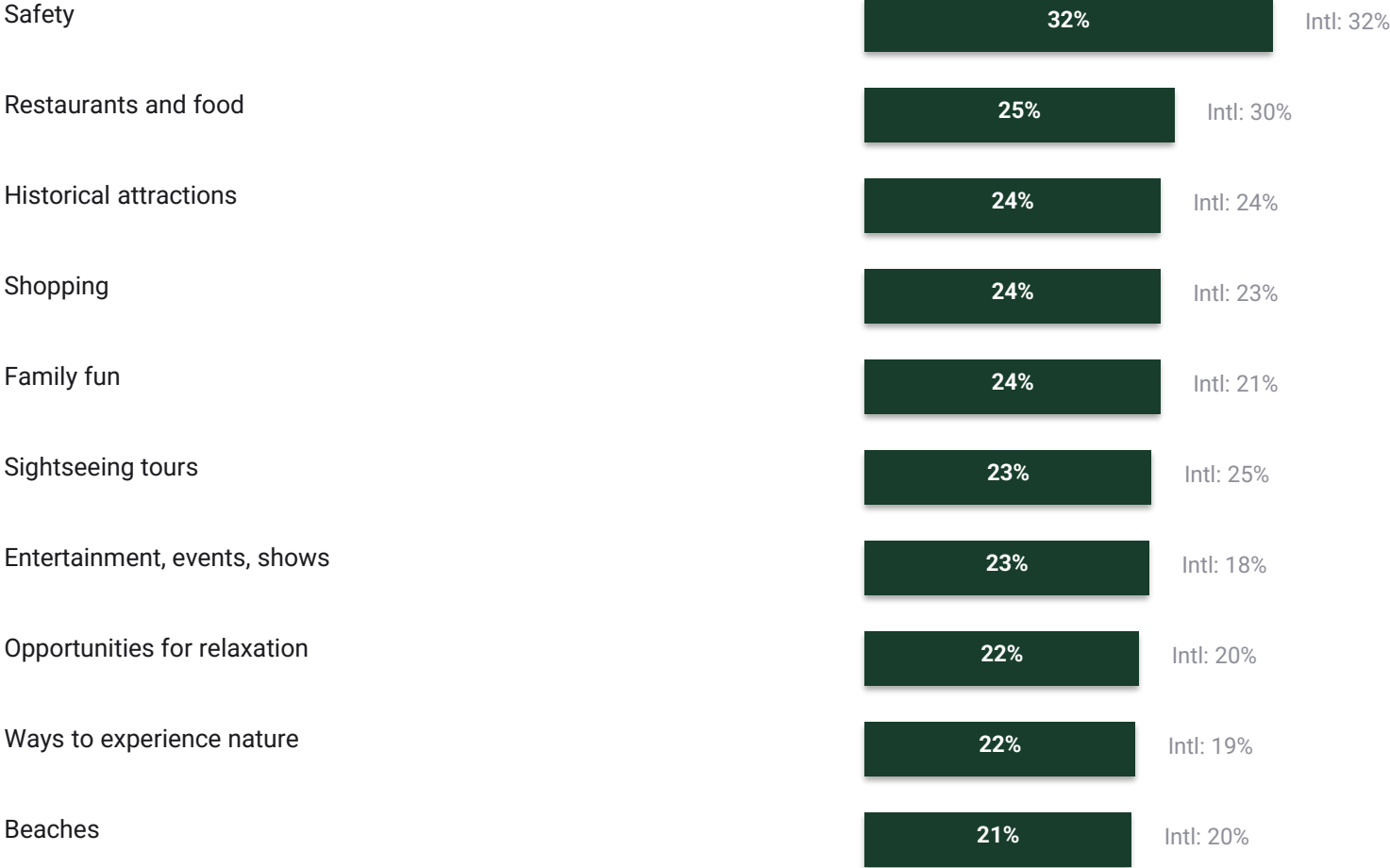
# Desired Travel Promotion Tone

India



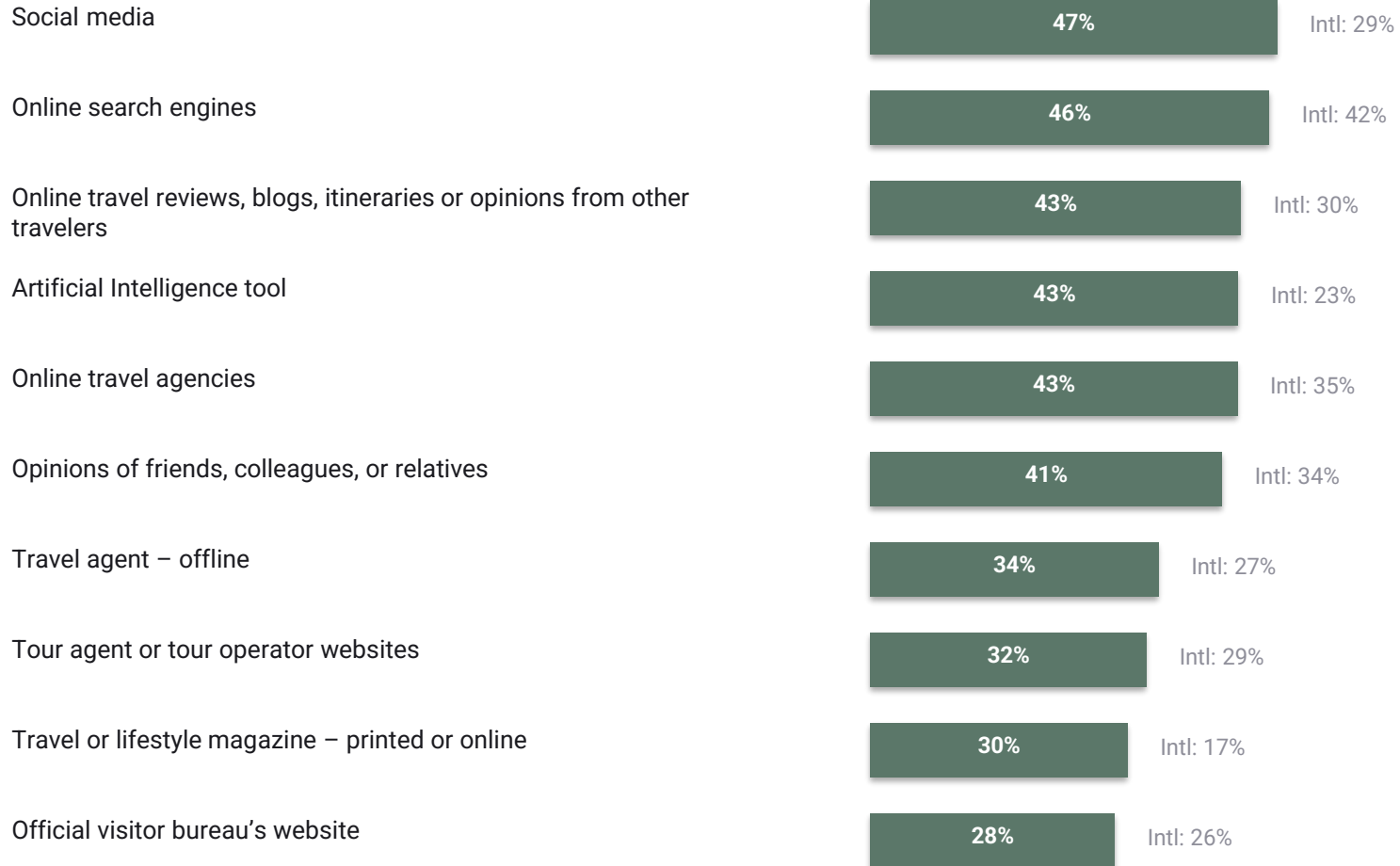
# Top Information Sources

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**

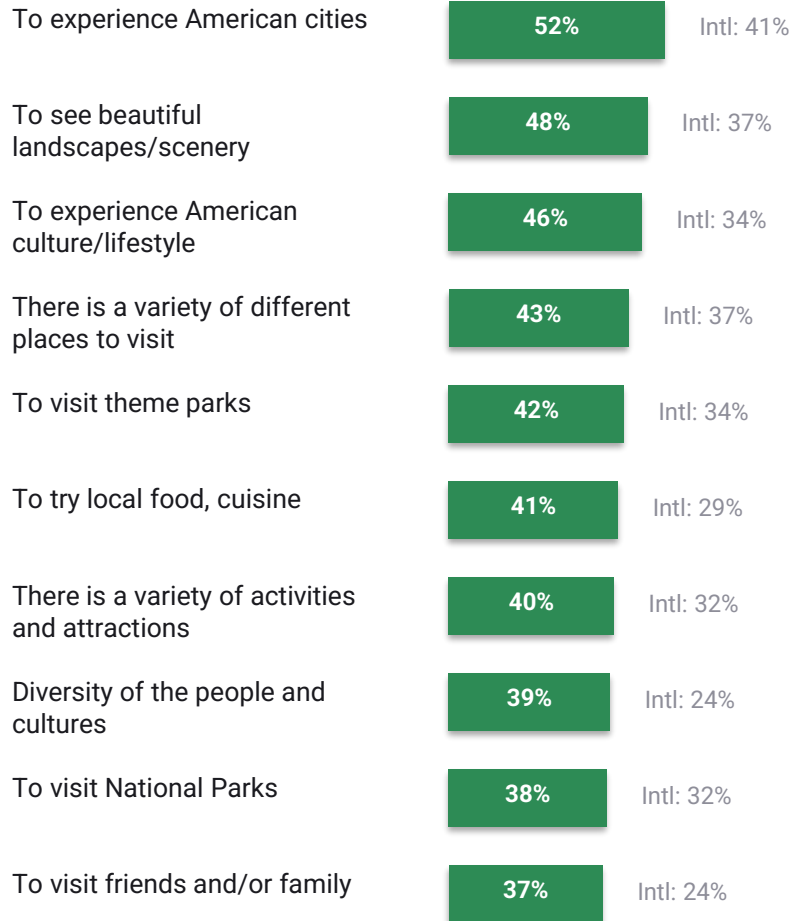
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Intl: \$5,049

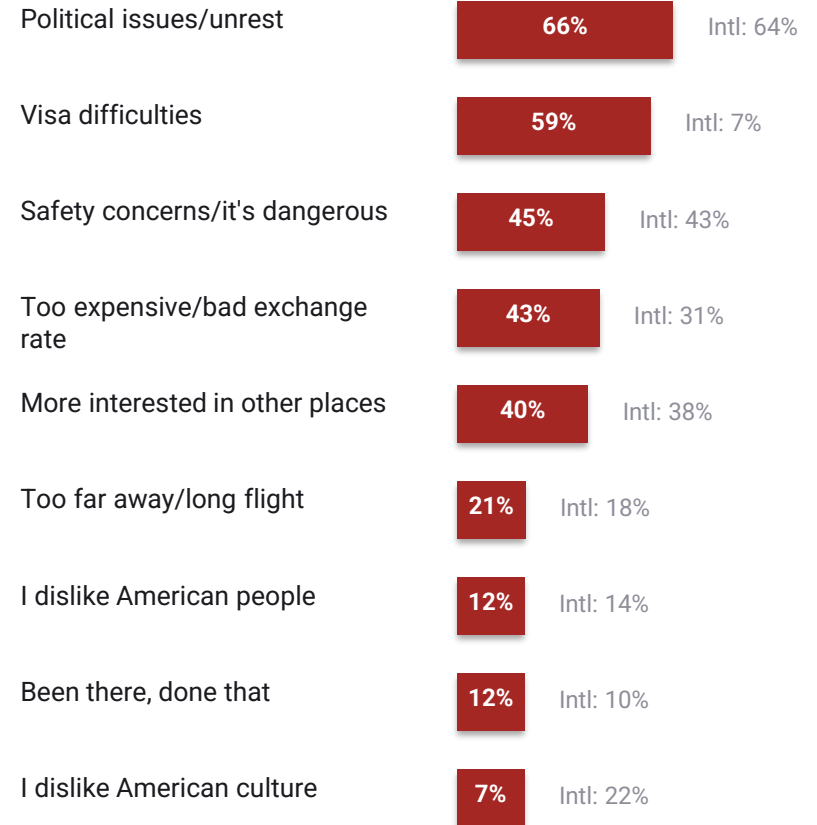
# Enablers & Barriers to Visiting

India

## Enablers

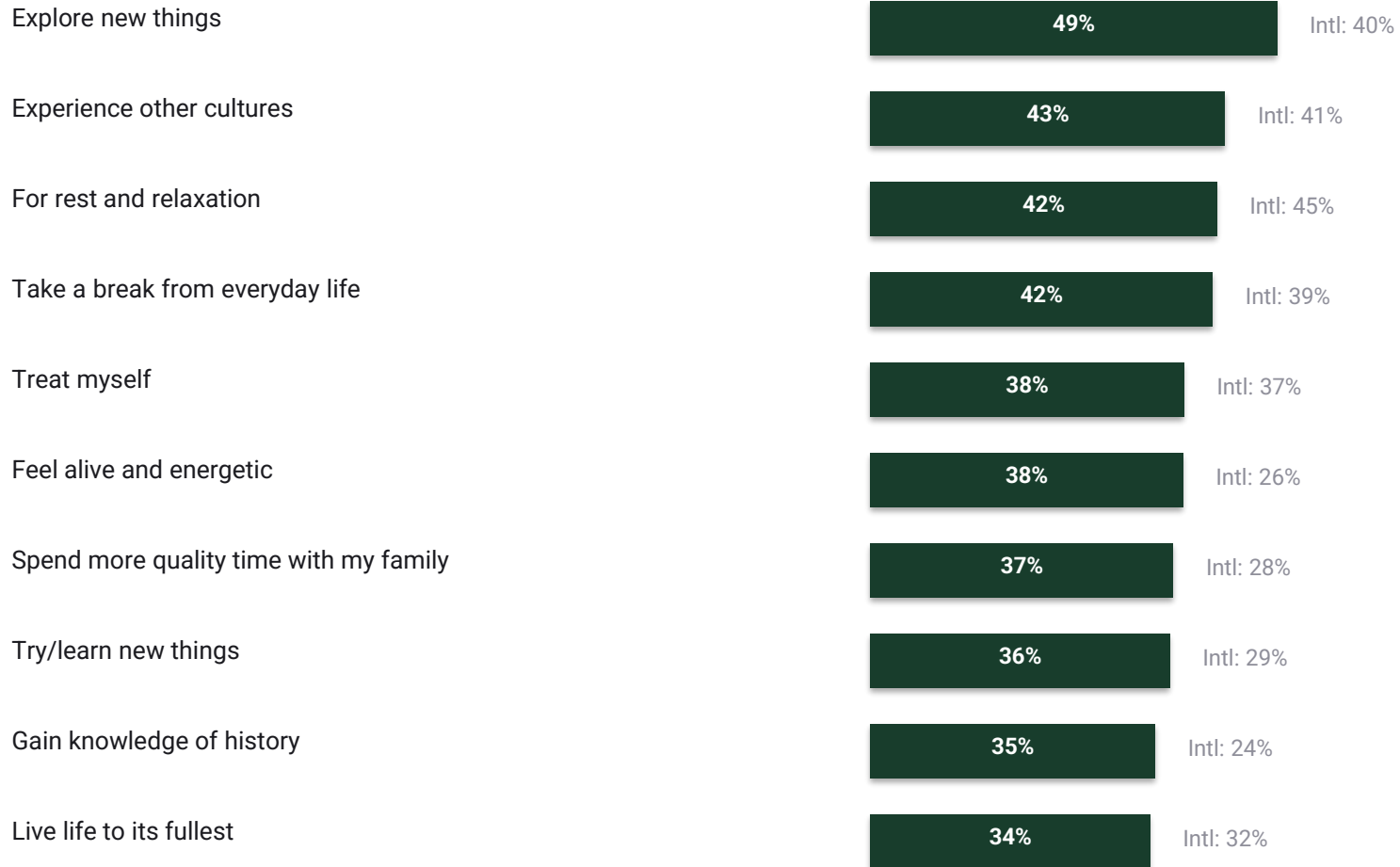


## Barriers



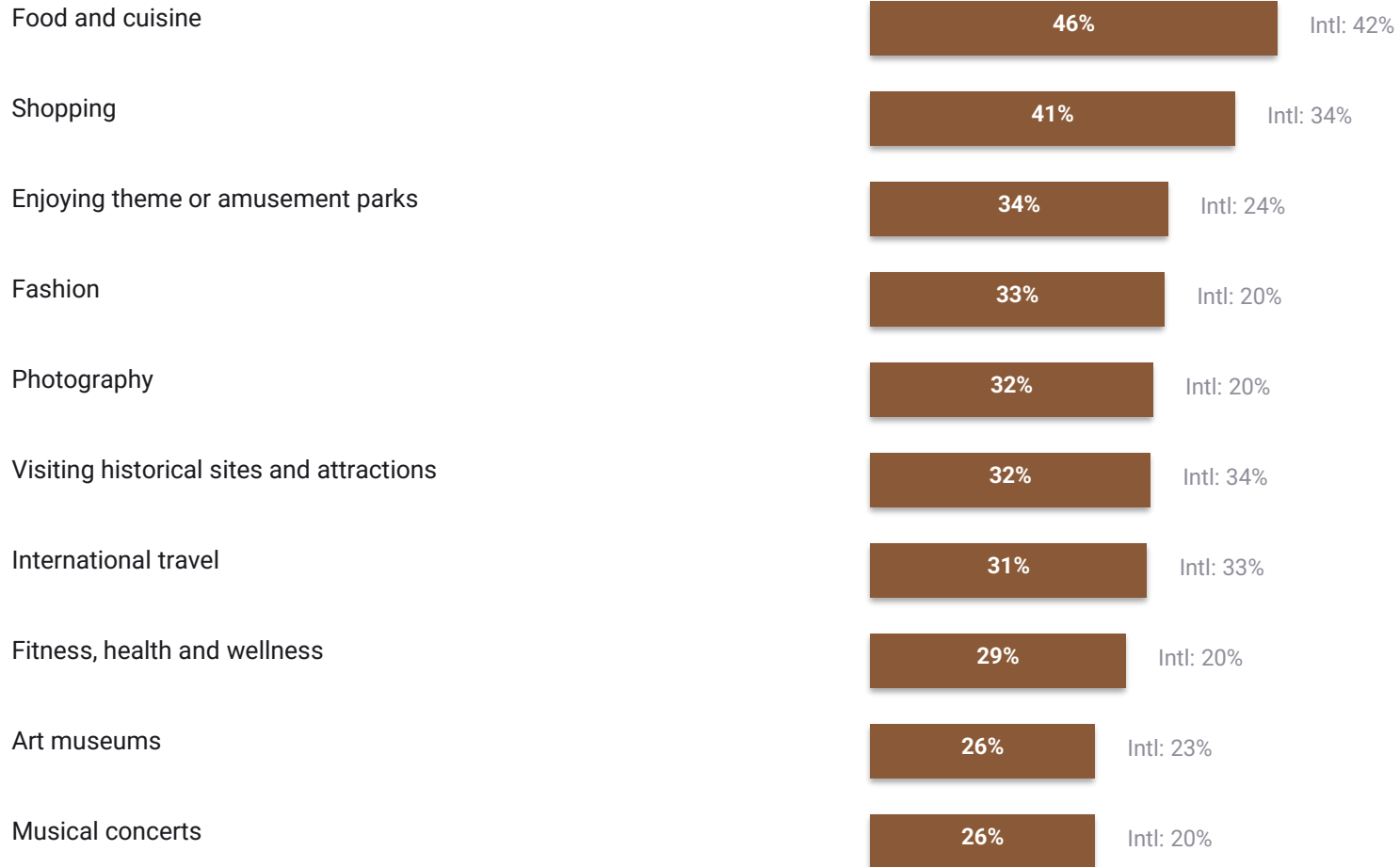
# Travel Motivations

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

# UNITED KINGDOM

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Source Market Analysis | Virginia

#3 by Spending | #3 by Visits

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# United Kingdom | Key Findings

- 1 2026 Virginia projected spending:** \$110.8M (+1.7% YOY). Projected visitors: 61.5K (+2.8% YOY). Ranks #3 by spending and #3 by visits among Virginia 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 (8.5%) exceeds 2015-2019 (3.7%).
- 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

**\$110.8M**

2026 Virginia Spending

**+1.7% YOY** vs. 2025

**61.5K**

2026 Virginia Visitors

**+2.8% YOY** vs. 2025

**\$11.9B**

2026 USA Spending

**+3.3% YOY** vs. 2025

**5.8M**

2026 USA Visitors

**+3.5% YOY** vs. 2025

**\$109M**

2025 Virginia Spending

**+15.1% YOY** vs. 2024

**59.8K**

2025 Virginia Visitors

**+2.4% 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

**3.7%**

Spending

**2.1%**

Visits

2023-2027 PROJECTED CAGR

**8.5%**

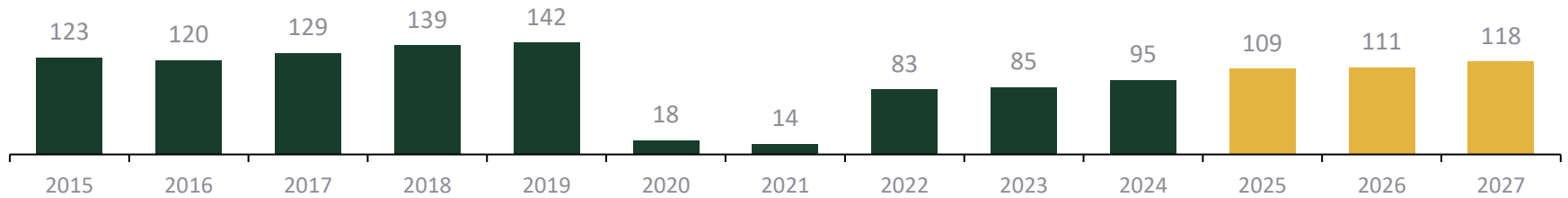
Spending

**4.5%**

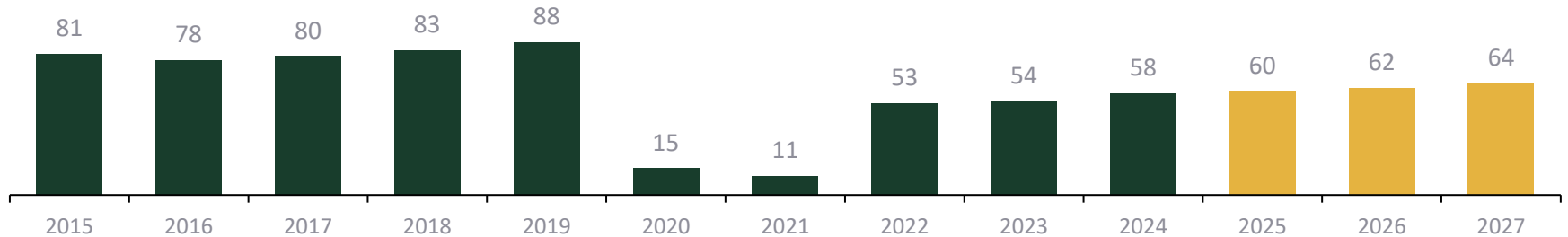
Visits

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%

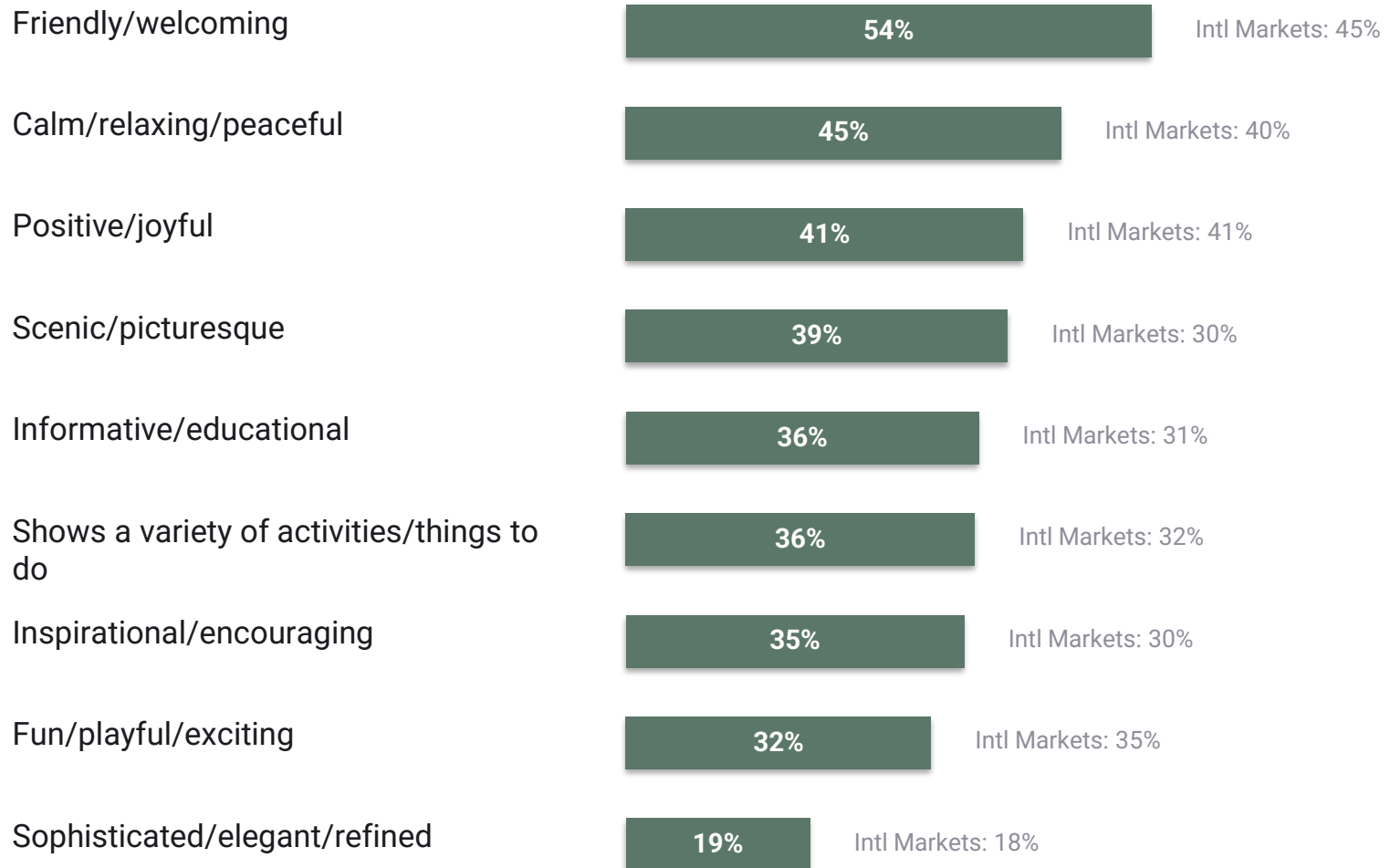
**41%**

**Likely to Visit (5yr)**

Intl Markets: 41%

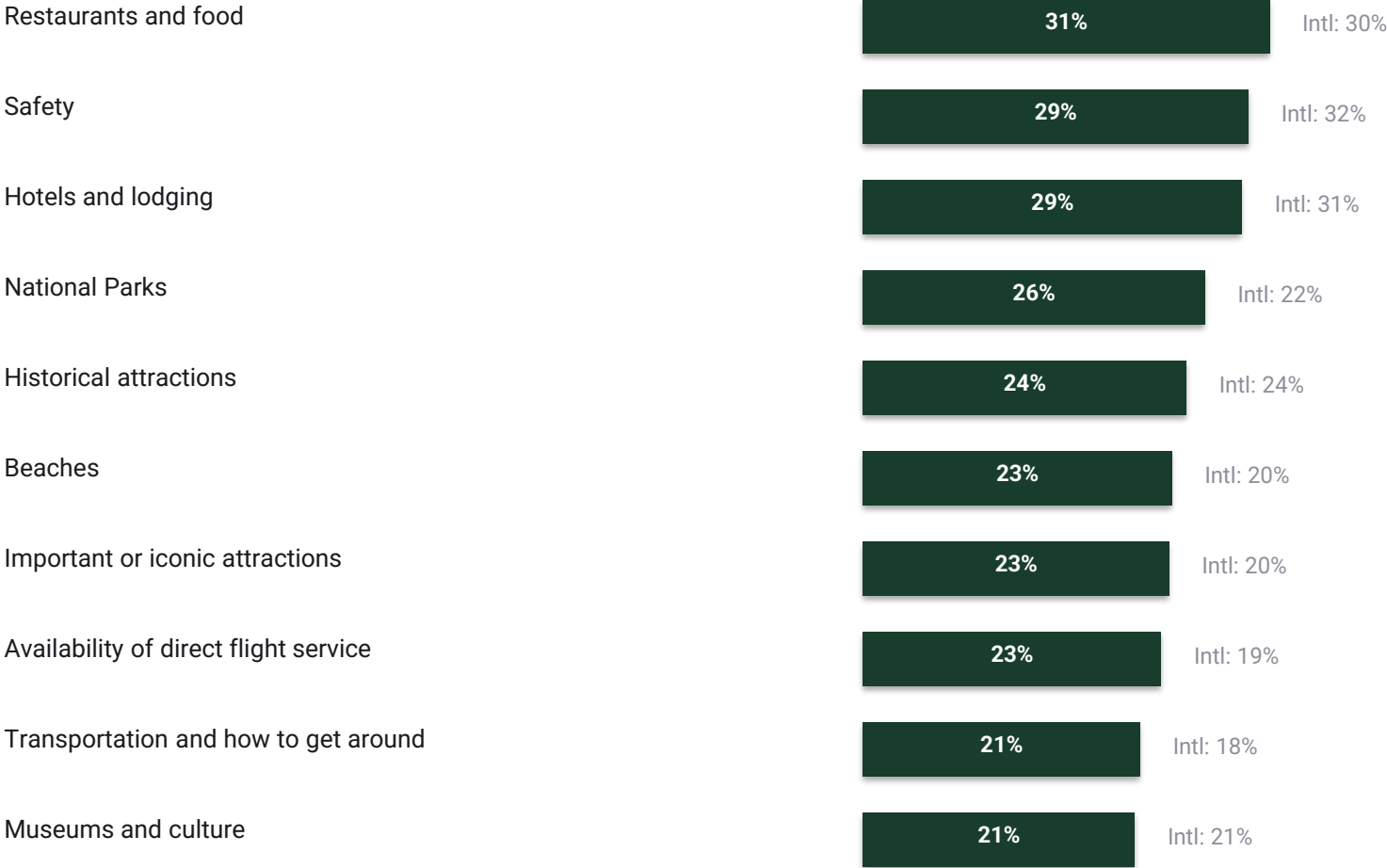
# Desired Travel Promotion Tone

United Kingdom



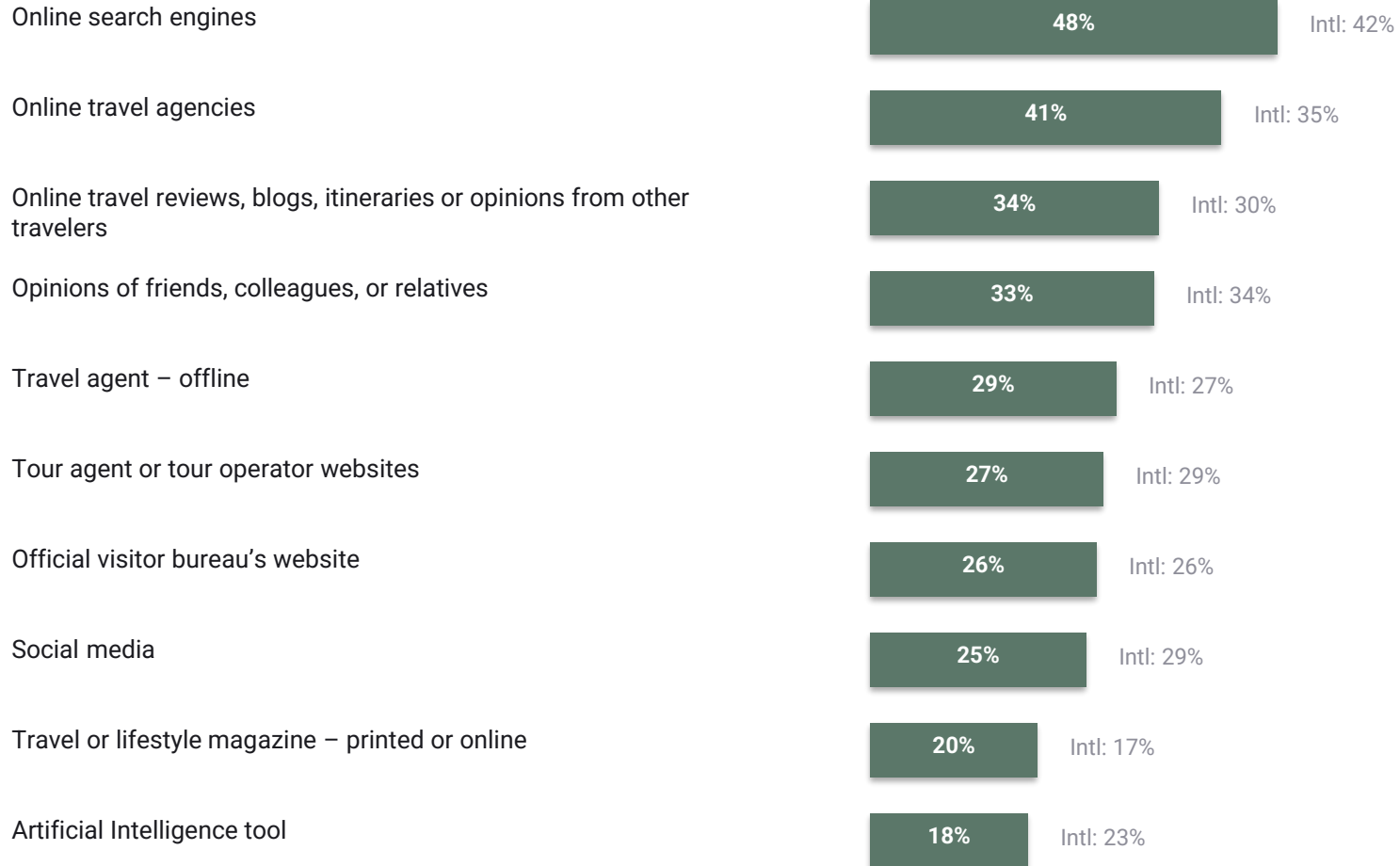
# Top Information Sources

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**

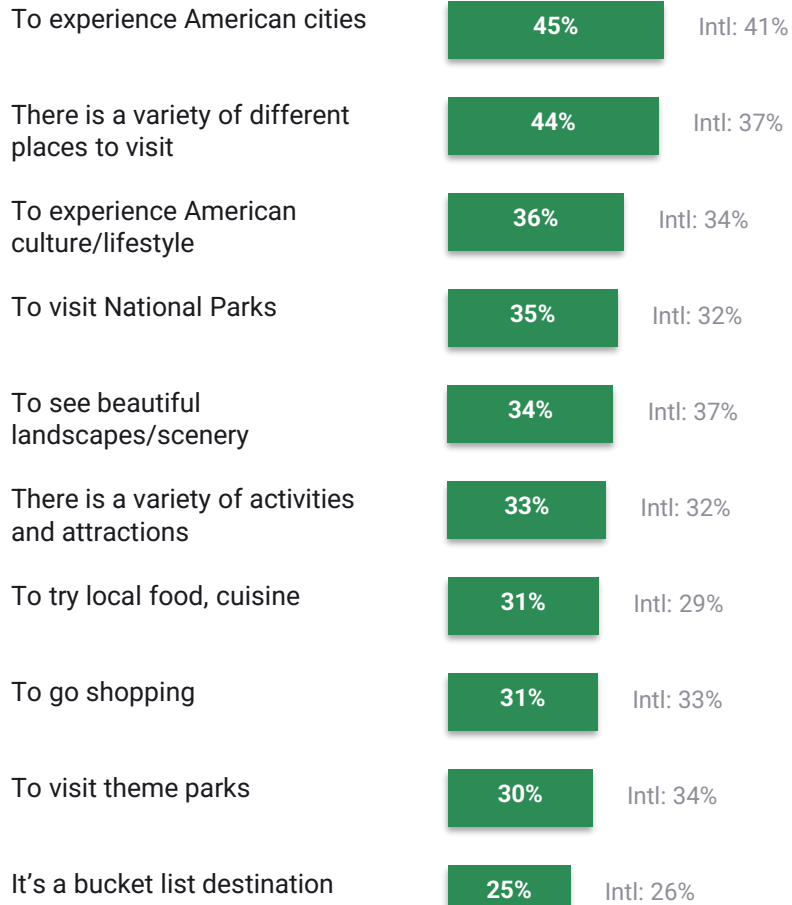
Total

Intl: \$5,049

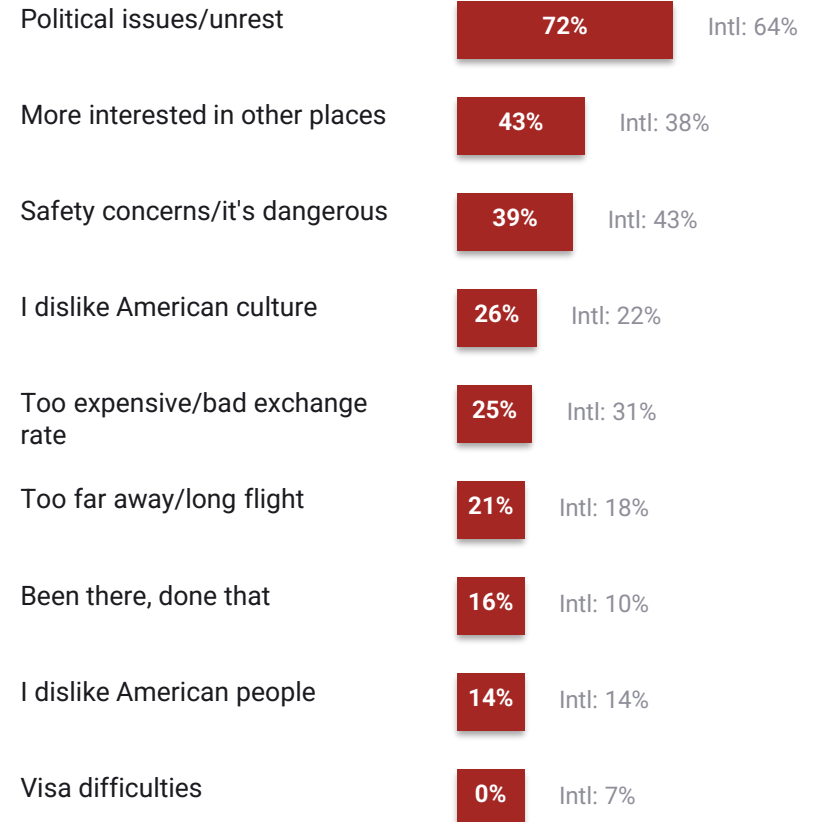
# Enablers & Barriers to Visiting

United Kingdom

## Enablers

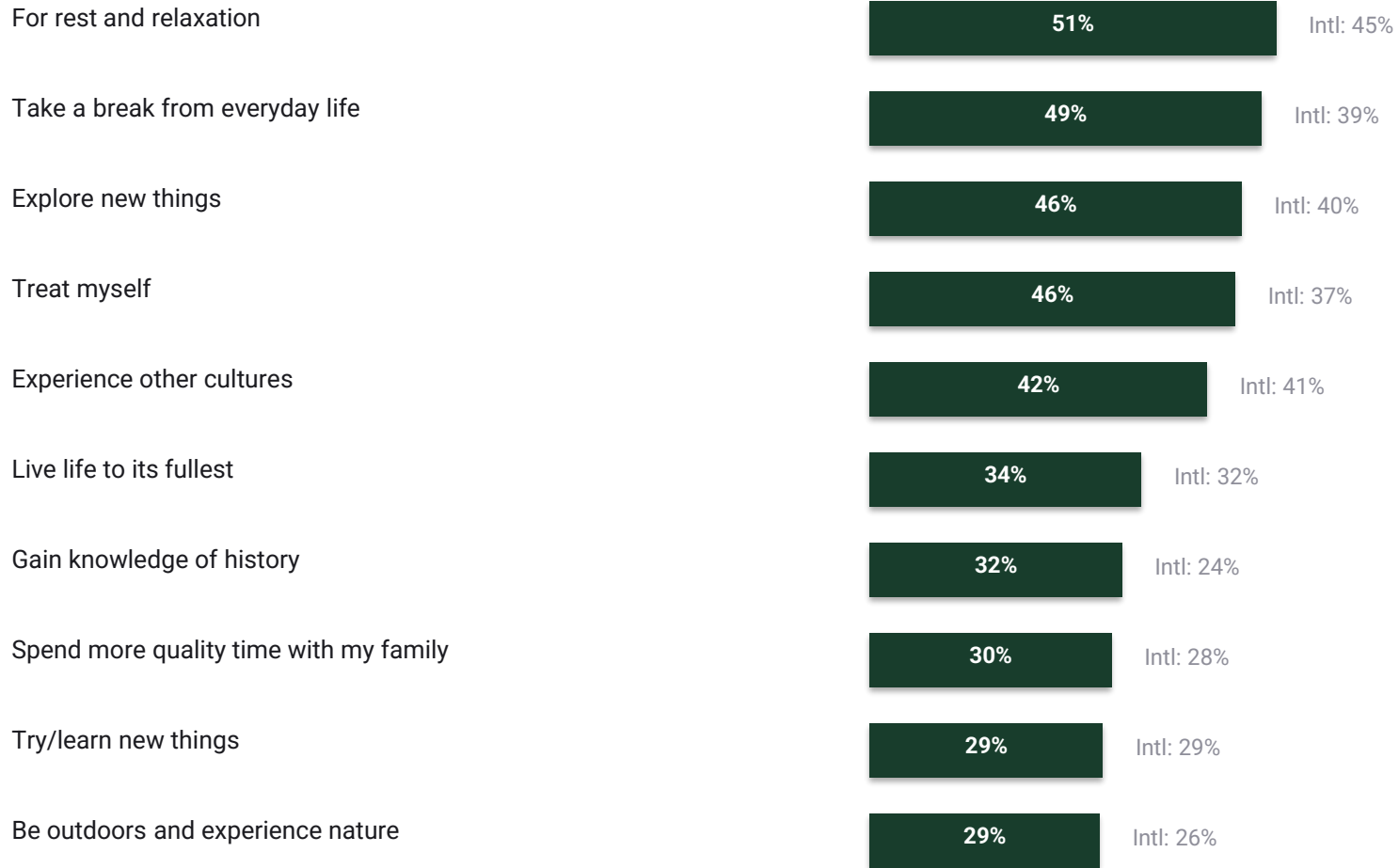


## Barriers



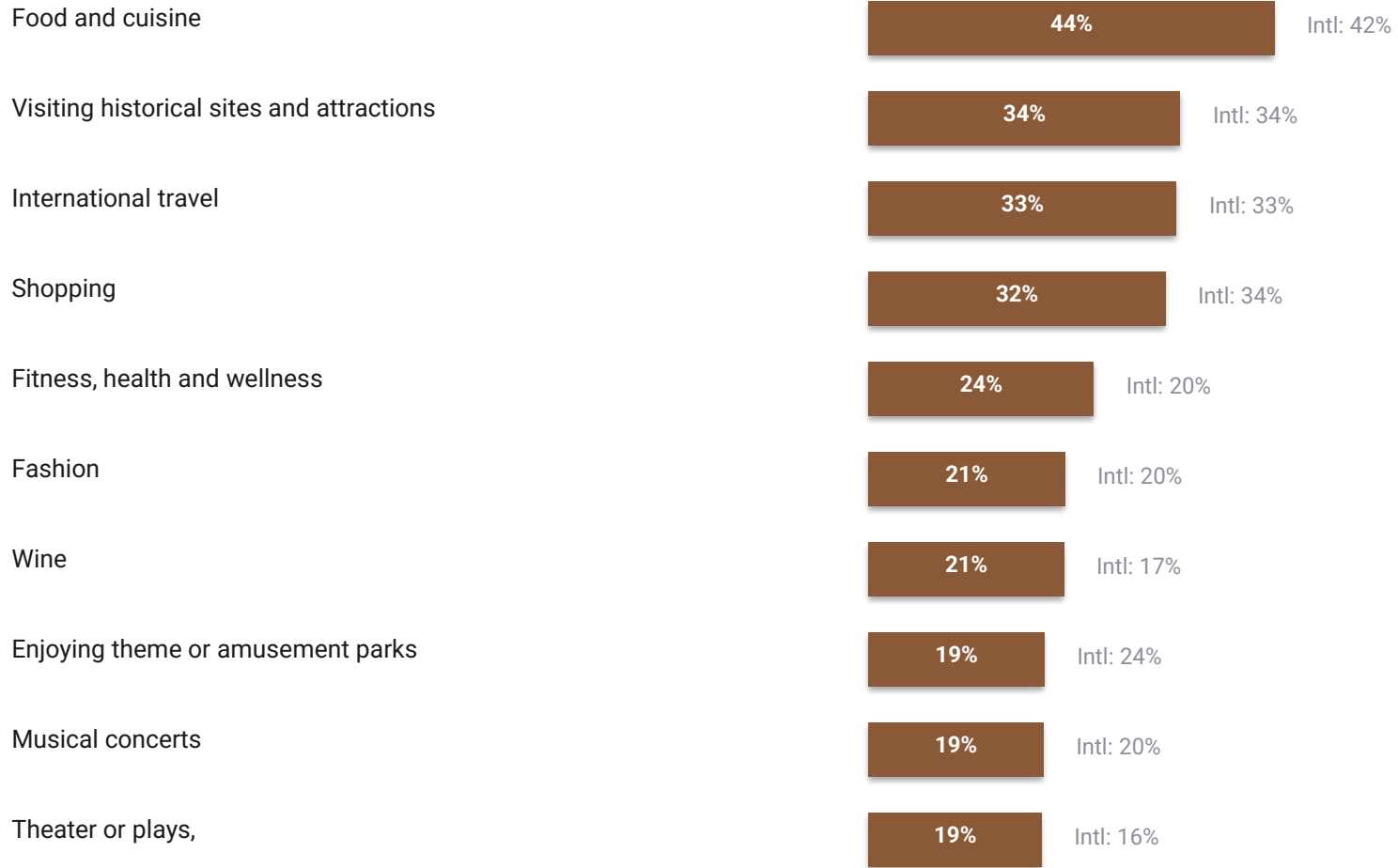
# Travel Motivations

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

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Source Market Analysis | Virginia

**#4 by Spending | #5 by Visits**

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All Y'all Are Welcome USA

# China | Key Findings

- 1 2026 Virginia projected spending:** \$91.9M (+4.9% YOY). Projected visitors: 23.6K (+4.4% YOY). Ranks #4 by spending and #5 by visits among Virginia source markets.
- 2 Macro Context:** China 2026 GDP growth projected at 4.2%. Exchange rate: 6.84 CNY/USD.
- 3 CAGR Comparison:** 2023-2027 projected spending CAGR (27.1%) exceeds 2015-2019 (2.2%).
- 4 Visitor Perceptions:** 77% familiarity with the American South, 83% appeal, 54% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$8,672 for a 2-week trip. Average length of stay: 10.2 days. Average destinations: 3.0.
- 6 Top Motivation:** For rest and relaxation (37%)
- 7 Top Enabler:** To see beautiful landscapes/scenery (36%)
- 8 Preferred Tone:** Fun/playful/exciting (44%)
- 9 Top Barrier:** Political issues/unrest (61%)

# China

**\$91.9M**

2026 Virginia Spending

**+4.9% YOY** vs. 2025

**23.6K**

2026 Virginia Visitors

**+4.4% YOY** vs. 2025

**\$8.8B**

2026 USA Spending

**+4.8% YOY** vs. 2025

**2.8M**

2026 USA Visitors

**+4.8% YOY** vs. 2025

**\$87.6M**

2025 Virginia Spending

**+6.1% YOY** vs. 2024

**22.6K**

2025 Virginia Visitors

**-3% 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

**2.2%**

Spending

**3.9%**

Visits

2023-2027 PROJECTED CAGR

**27.1%**

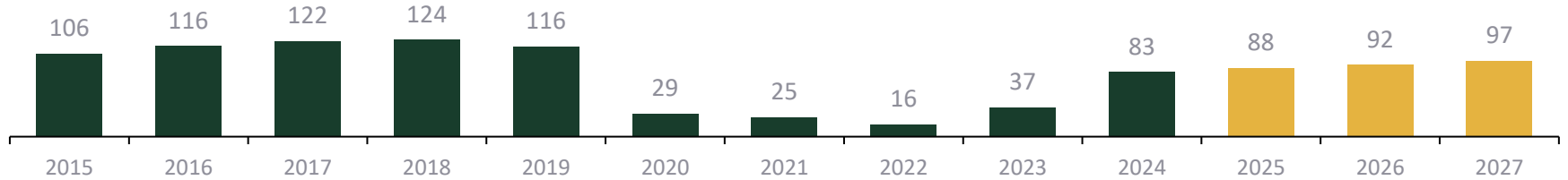
Spending

**15.3%**

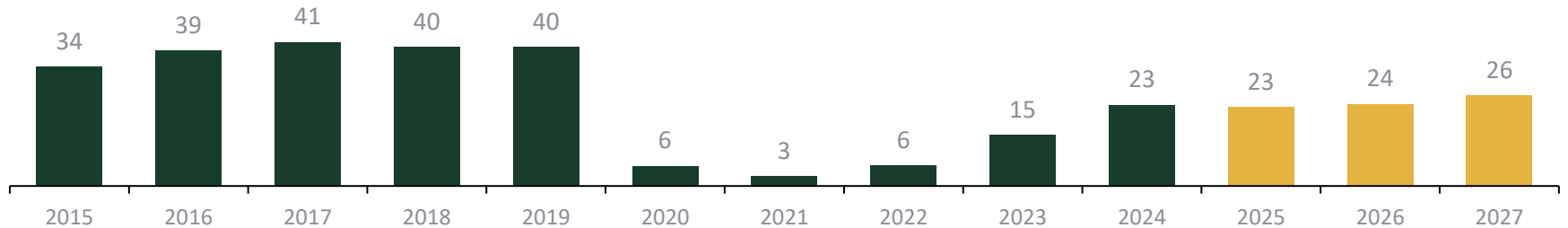
Visits

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%

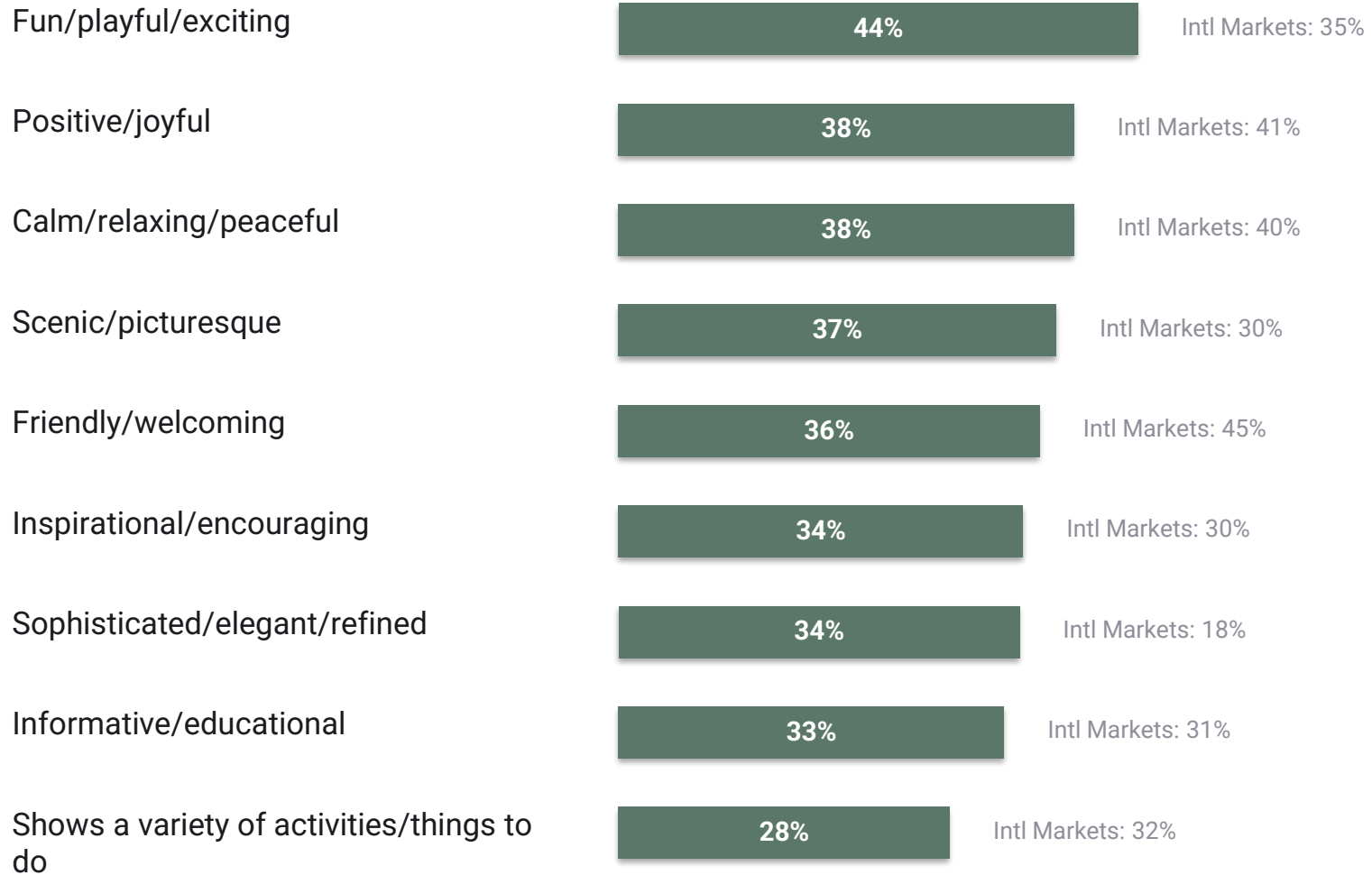
**54%**

**Likely to Visit (5yr)**

Intl Markets: 41%

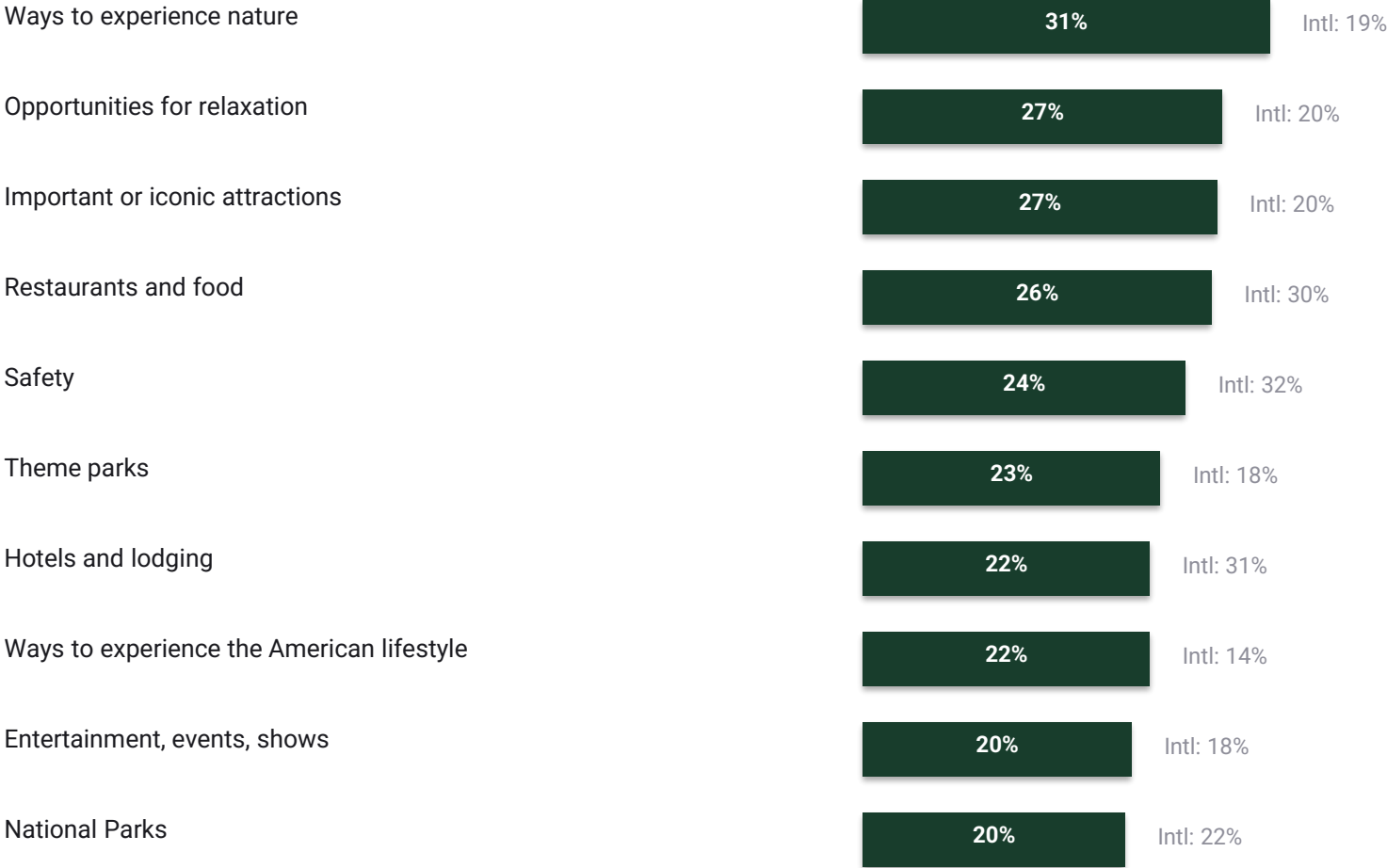
# Desired Travel Promotion Tone

China



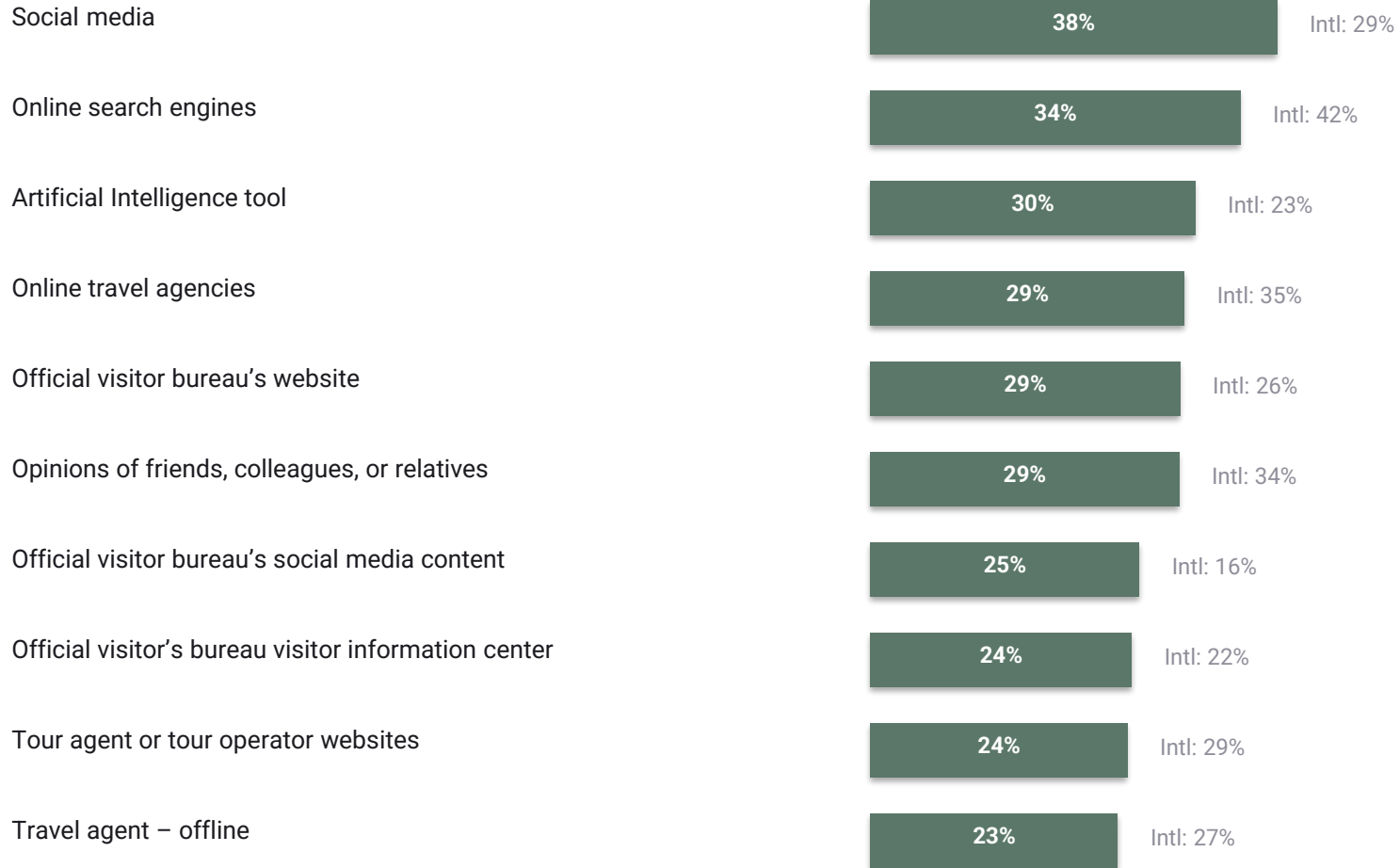
# Top Information Sources

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**

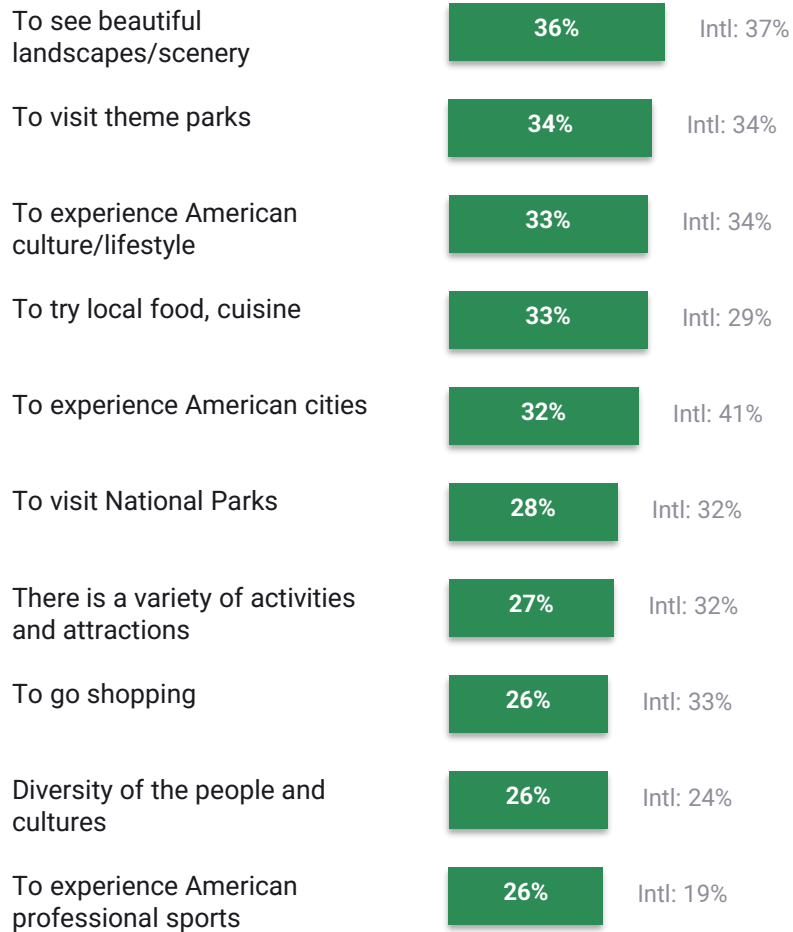
Total

Intl: \$5,049

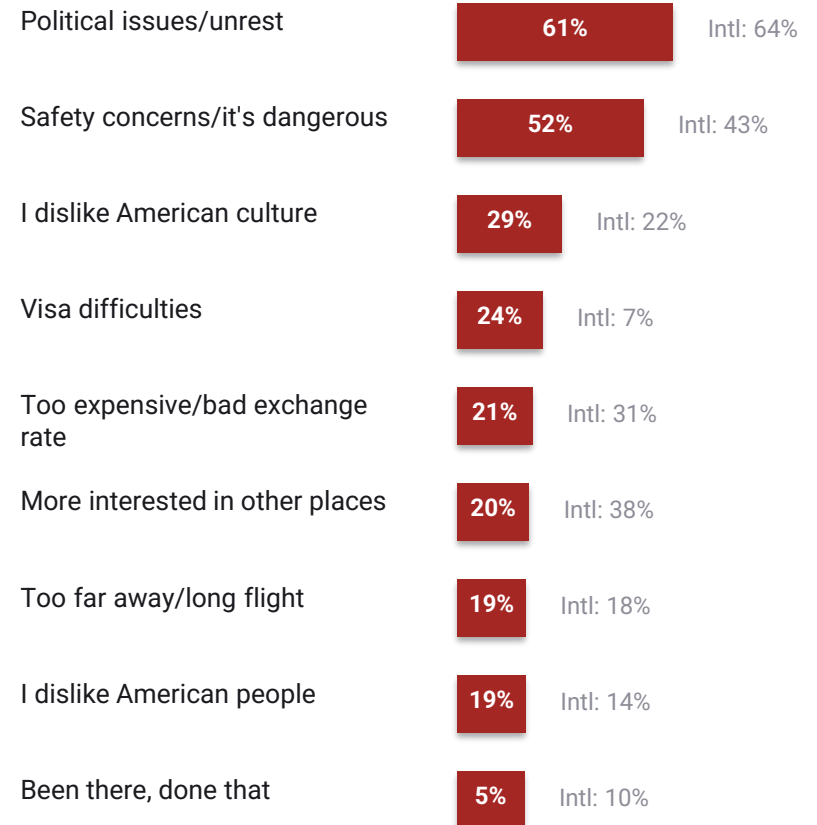
# Enablers & Barriers to Visiting

China

## Enablers

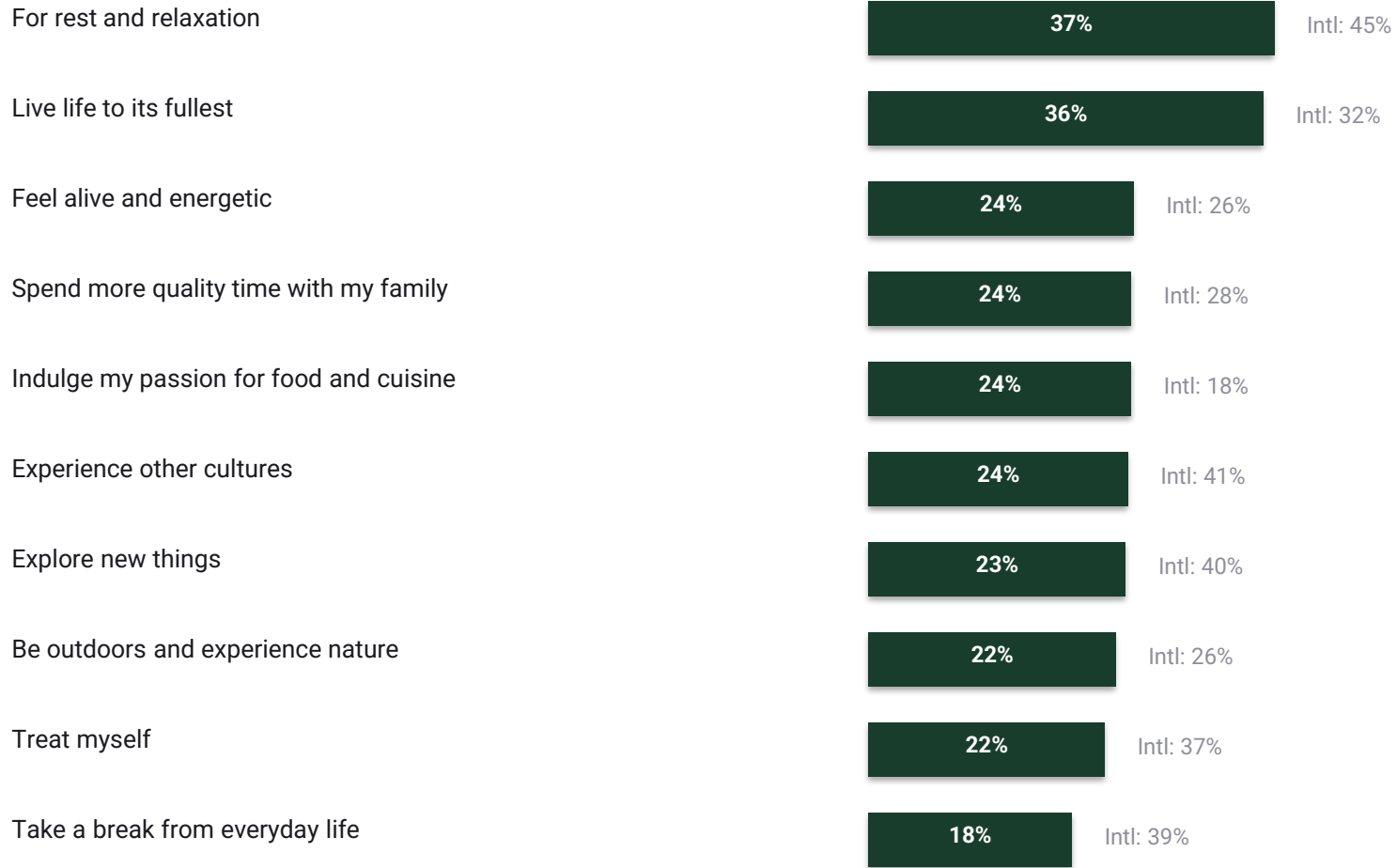


## Barriers



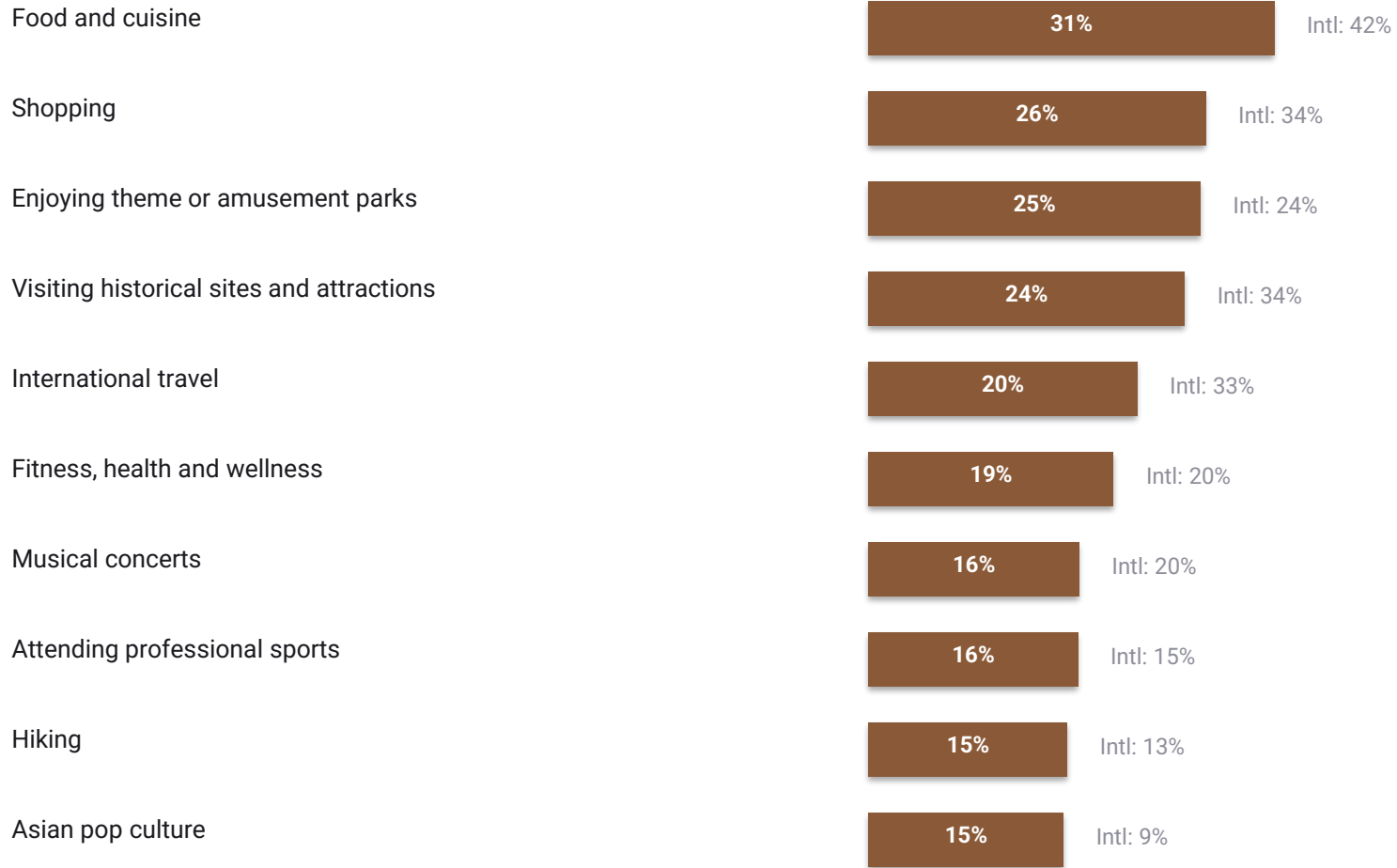
# Travel Motivations

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.

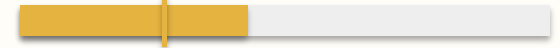
47%



Intl: 34%

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

43%



Intl: 27%

China

Intl Markets

# GERMANY

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Source Market Analysis | Virginia

#5 by Spending | #4 by Visits

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All Y'all Are Welcome USA

# Germany | Key Findings

- 1 2026 Virginia projected spending:** \$72.3M (+8.1% YOY). Projected visitors: 40K (+3.9% YOY). Ranks #5 by spending and #4 by visits among Virginia 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 (9.4%) exceeds 2015-2019 (5.3%).
- 4 Visitor Perceptions:** 67% familiarity with the American South, 72% appeal, 36% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$4,127 for a 2-week trip. Average length of stay: 12.5 days. Average destinations: 4.5.
- 6 Top Motivation:** For rest and relaxation (43%)
- 7 Top Enabler:** To see beautiful landscapes/scenery (37%)
- 8 Preferred Tone:** Friendly/welcoming (48%)
- 9 Top Barrier:** Political issues/unrest (66%)

# Germany

**\$72.3M**

2026 Virginia Spending

**+8.1% YOY** vs. 2025

**40K**

2026 Virginia Visitors

**+3.9% YOY** vs. 2025

**\$6.3B**

2026 USA Spending

**+7.7% YOY** vs. 2025

**2.8M**

2026 USA Visitors

**+3.8% YOY** vs. 2025

**\$66.9M**

2025 Virginia Spending

**+6.2% YOY** vs. 2024

**38.5K**

2025 Virginia Visitors

**-11.5% 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

**5.3%**

Spending

**4.3%**

Visits

2023-2027 PROJECTED CAGR

**9.4%**

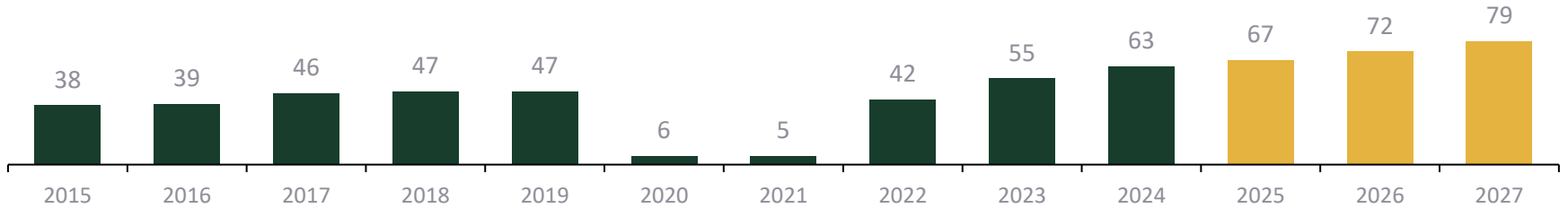
Spending

**2.6%**

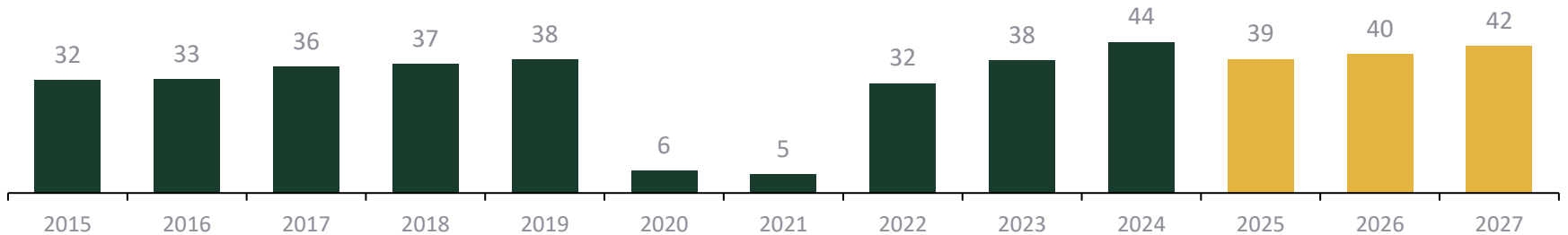
Visits

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%

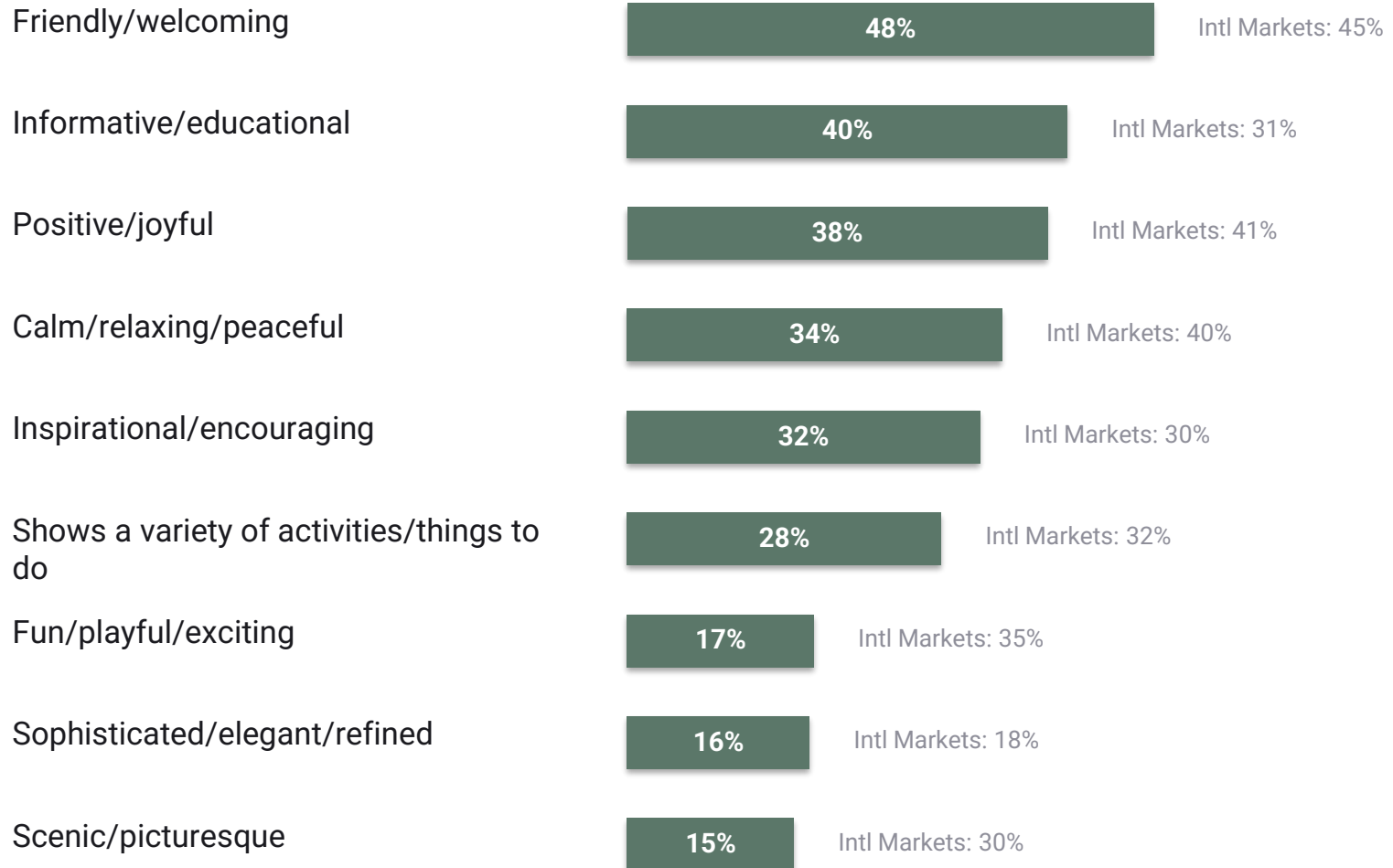
**36%**

**Likely to Visit (5yr)**

Intl Markets: 41%

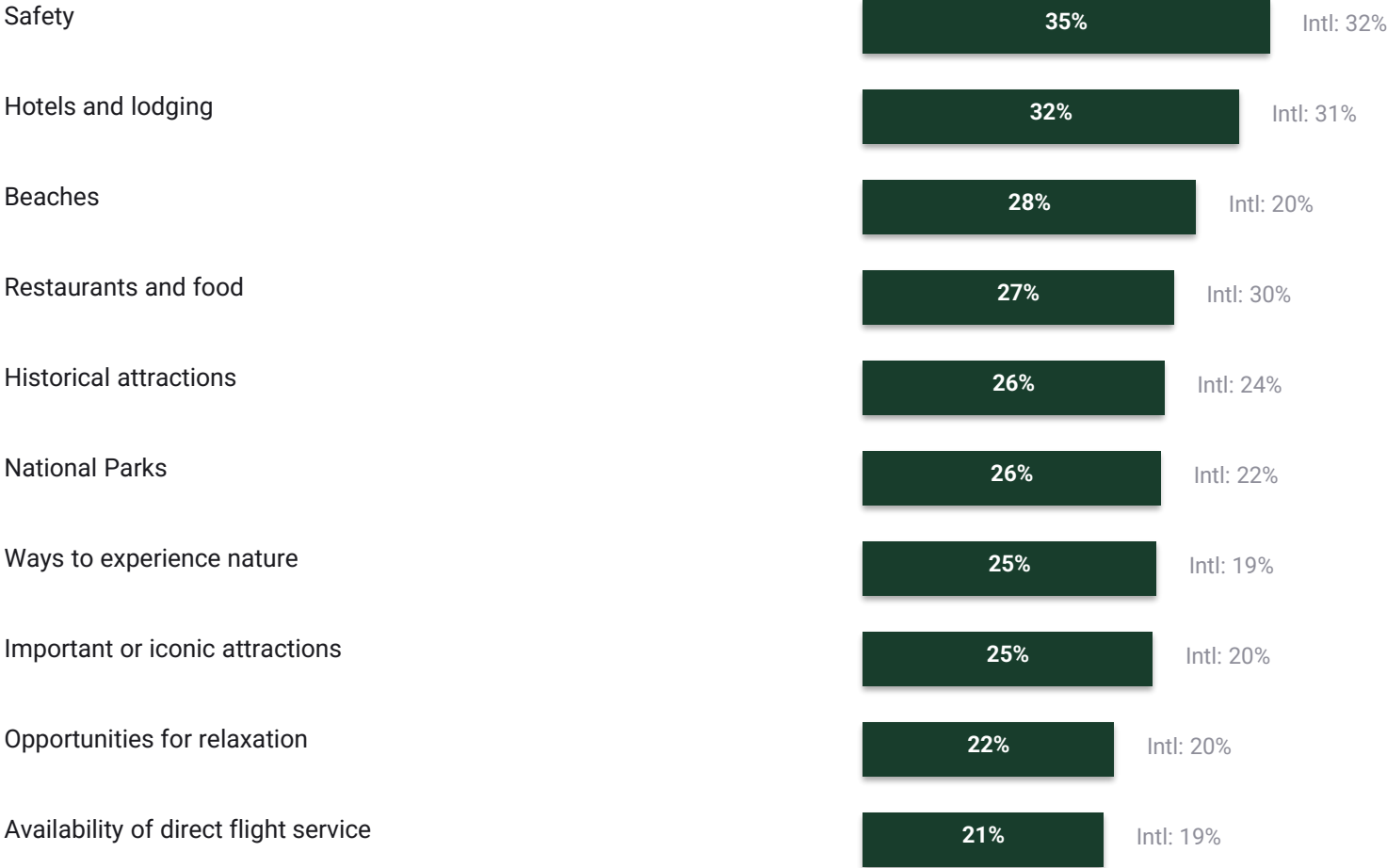
# Desired Travel Promotion Tone

Germany



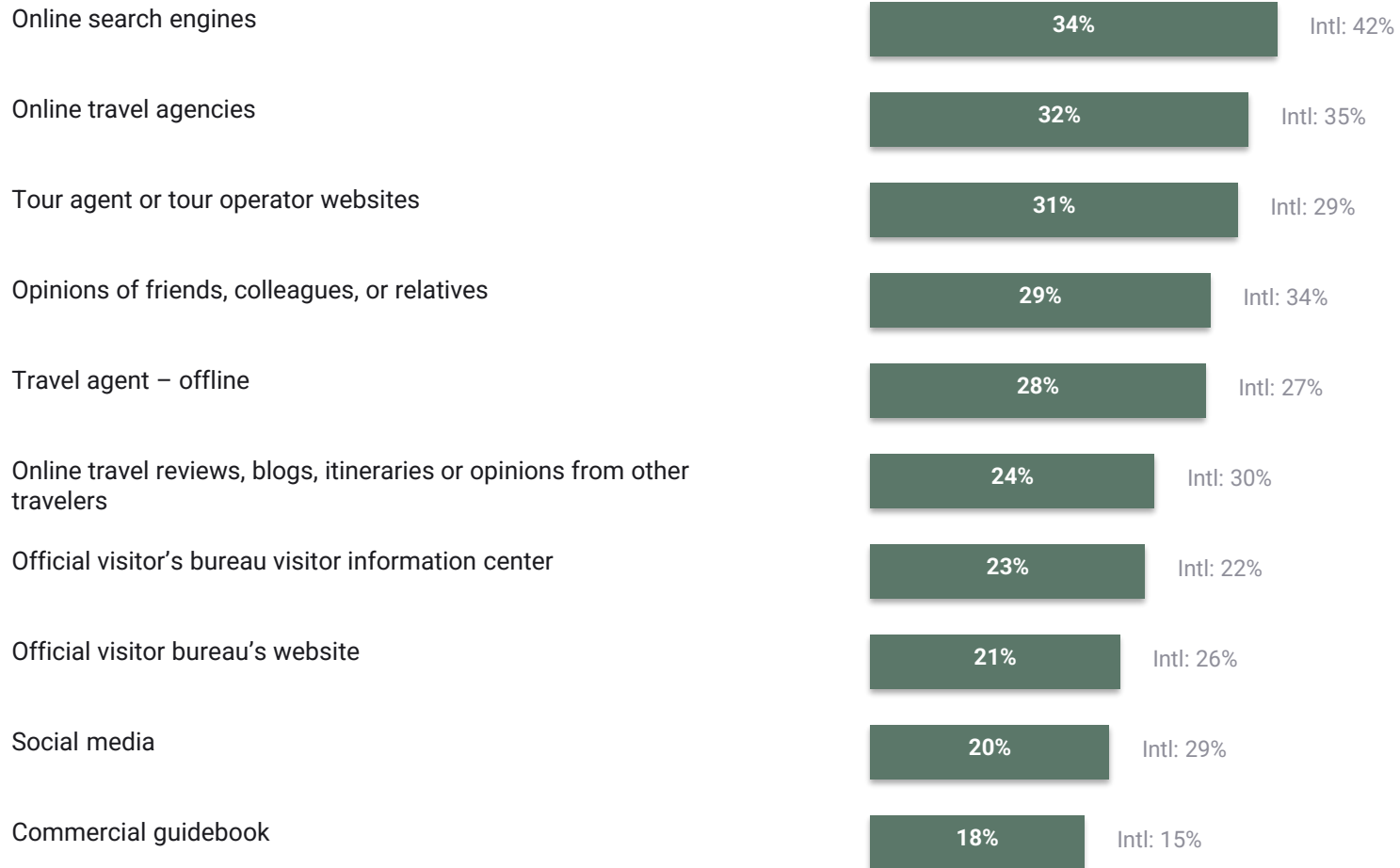
# Top Information Sources

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**

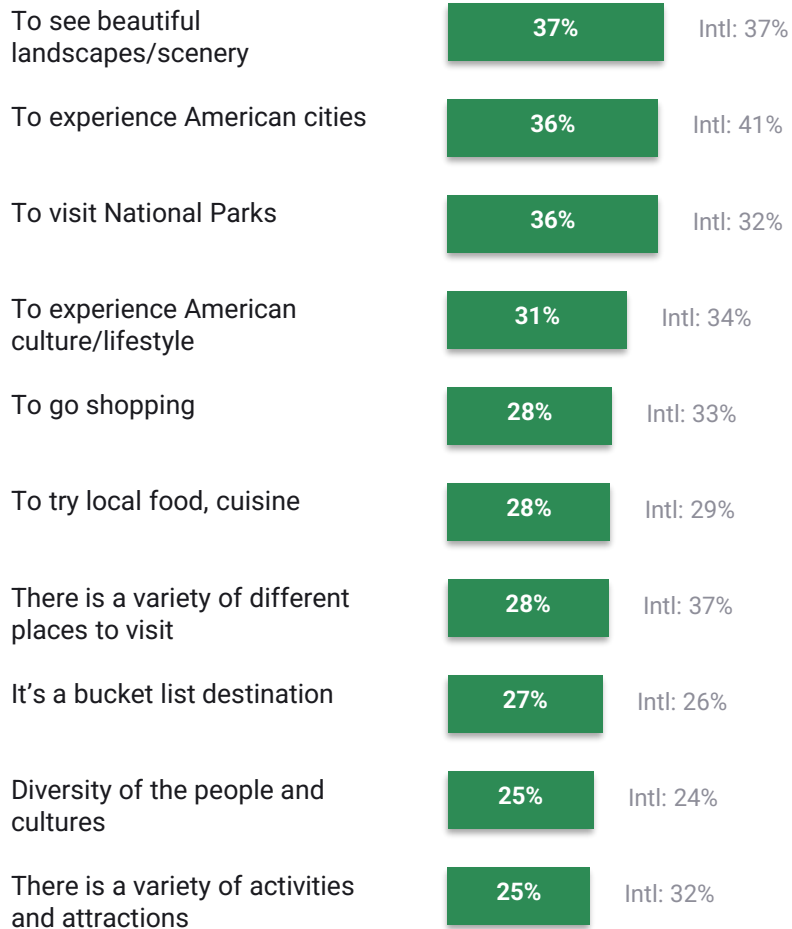
Total

Intl: \$5,049

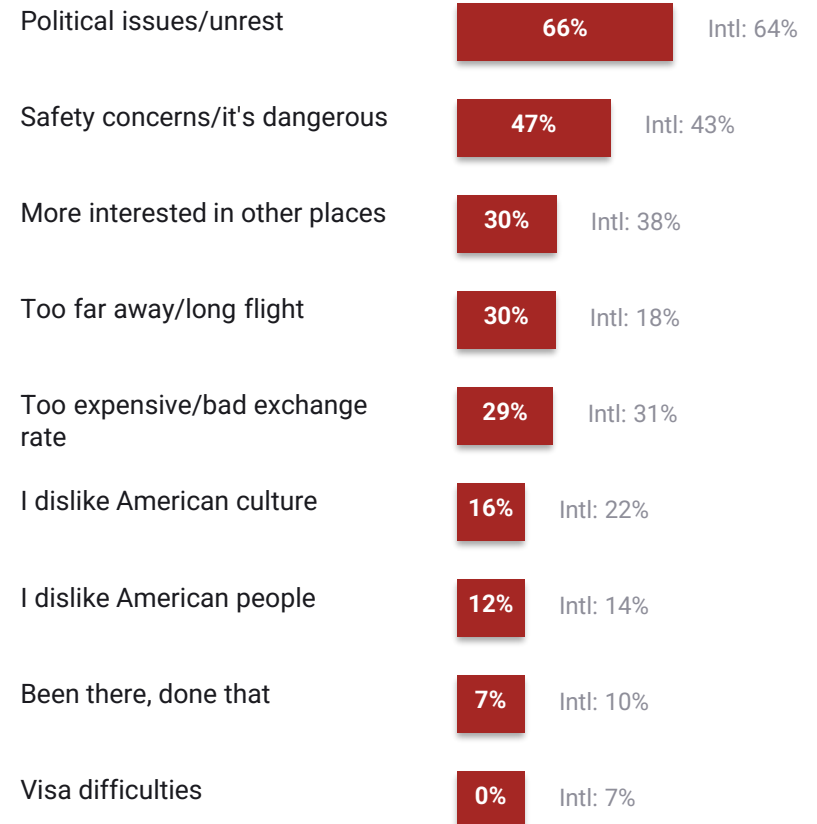
# Enablers & Barriers to Visiting

Germany

## Enablers

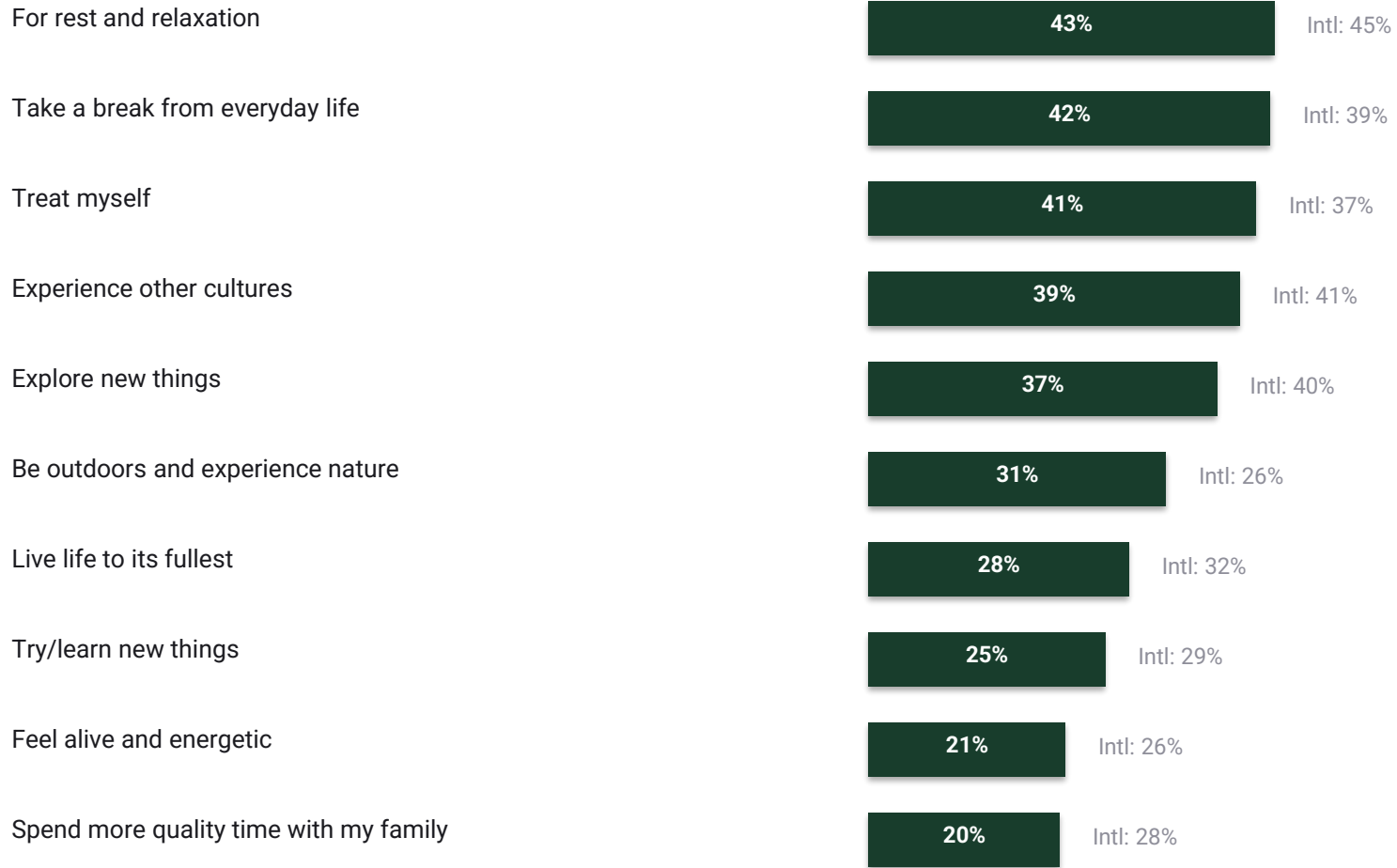


## Barriers



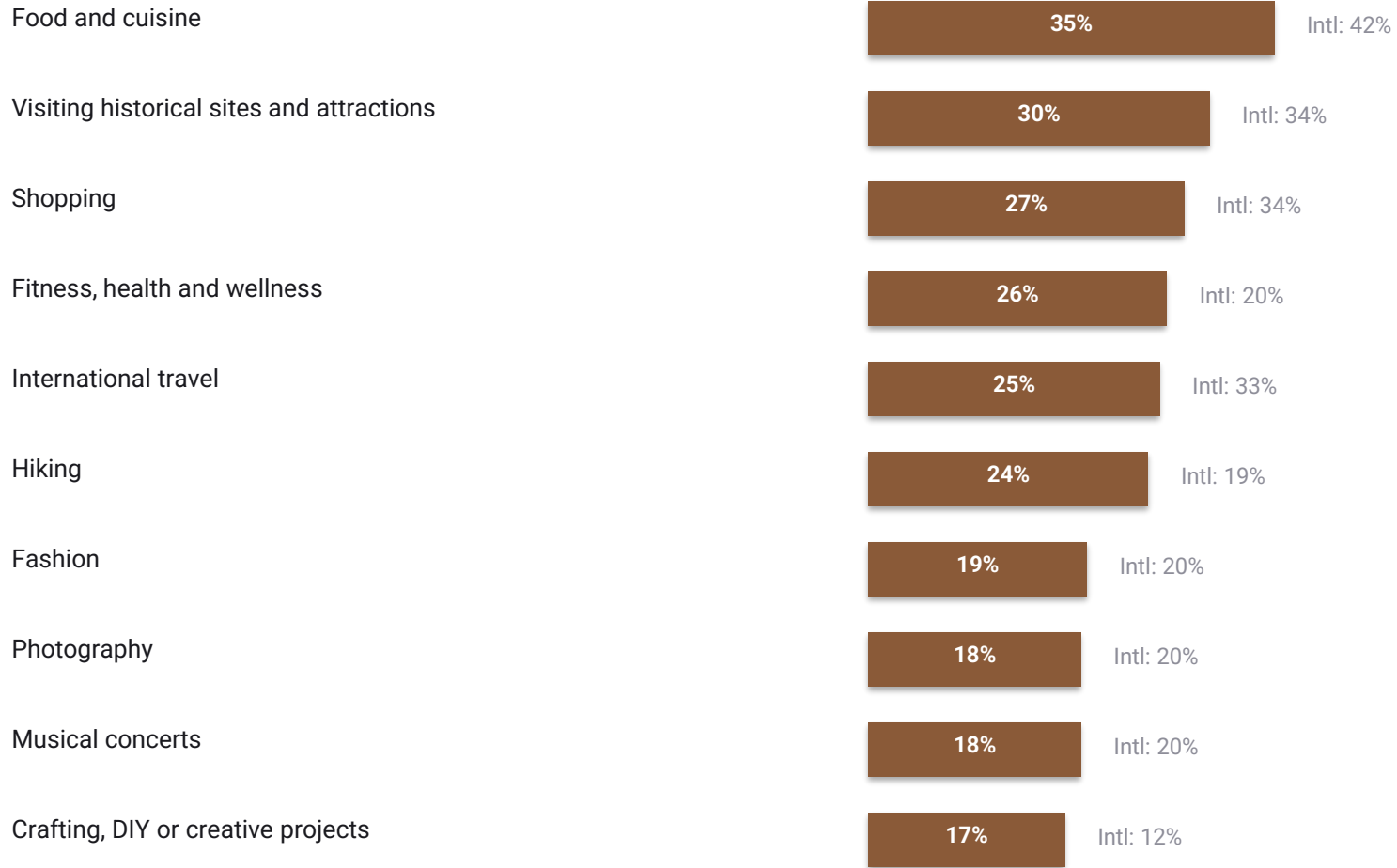
# Travel Motivations

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.