

WEST
VIRGINIA®

International Visitor Profile

TravelSouth
All Y'all Are Welcome USA

Key Findings

- 1 2026 projected spending:** \$84.0M (+5.9% YOY). Projected visitors: 165.9K (+5.1% YOY).
- 2 Top 10 Source Markets by Spending:** Canada (\$28.3M), UK + Ireland (\$7.0M), China (\$6.5M), India (\$5.5M), DACH Region (\$4.0M), South Korea (\$2.4M), Japan (\$2.0M), Philippines (\$1.9M), Brazil (\$1.9M), Benelux (\$1.8M).
- 3 Top 5 Growth Markets (Spending YOY):** Singapore (+15.3%), Taiwan (+15.2%), Bulgaria (+15.2%), Philippines (+14.1%), Indonesia (+13.2%).
- 4 Top 5 Declining Markets (Spending YOY):** Iran (-11.1%), Greece (-0.3%).
- 5** Canada leads by spending (\$28.3M). Canada leads by visits (143.8K).
- 6 CAGR:** 2023-2027 projected spending CAGR (7.5%) exceeds 2015-2019 (-5.3%).
- 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%)

West Virginia

\$84.0M

2026 Projected Spending

+5.9% YOY vs. 2025

\$55.6M

2026 Overseas Spending

+5.4% YOY vs. 2025

\$79.3M

2025 Projected Spending

-4.5% YOY vs. 2024

\$52.7M

2025 Overseas Spending

+1.7% YOY vs. 2024

165.9K

2026 Projected Visitors

+5.1% YOY vs. 2025

21.4K

2026 Overseas Visitors

+3.3% YOY vs. 2025

157.8K

2025 Projected Visitors

-19.3% YOY vs. 2024

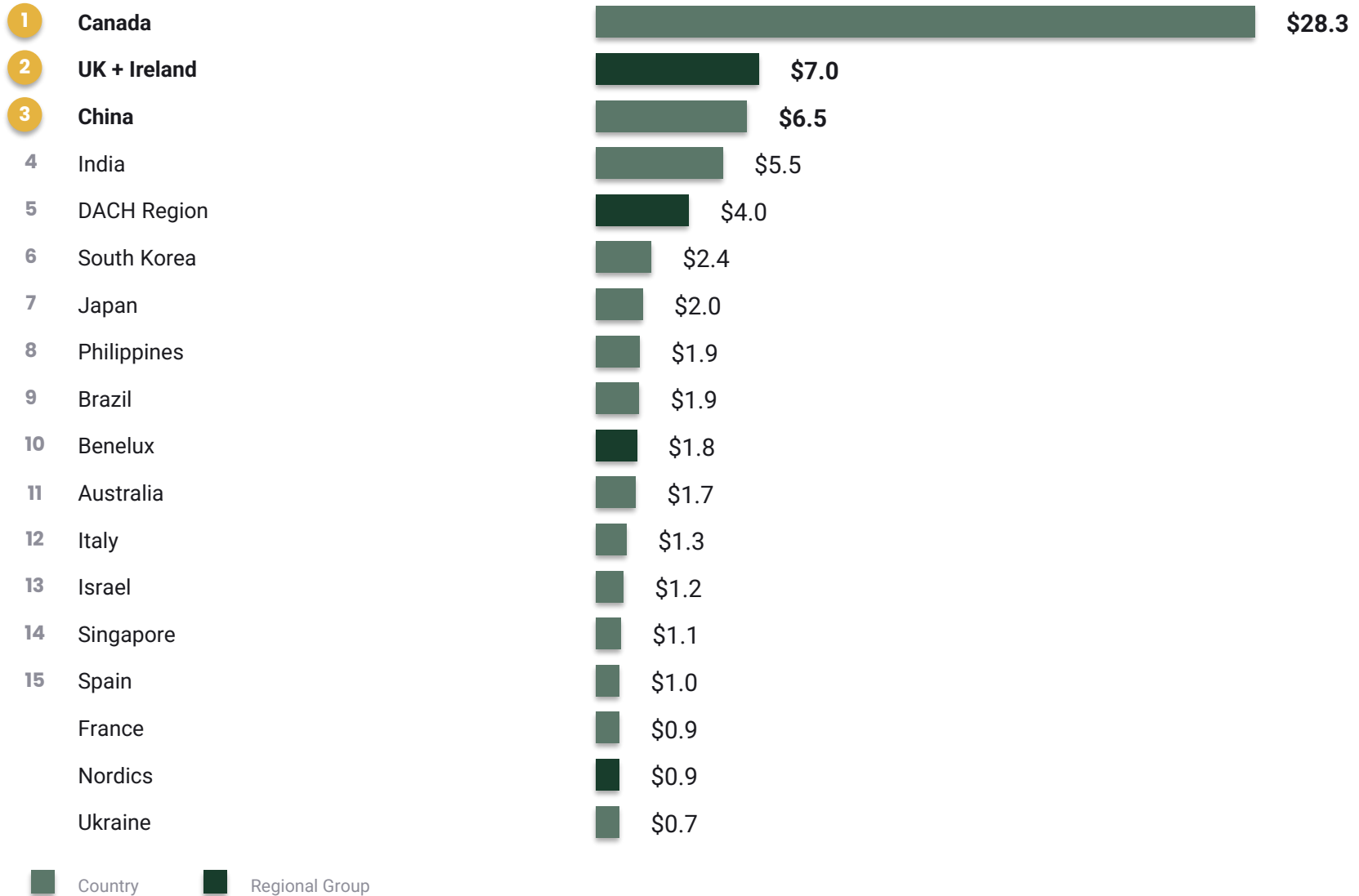
20.7K

2025 Overseas Visitors

-2.2% YOY vs. 2024

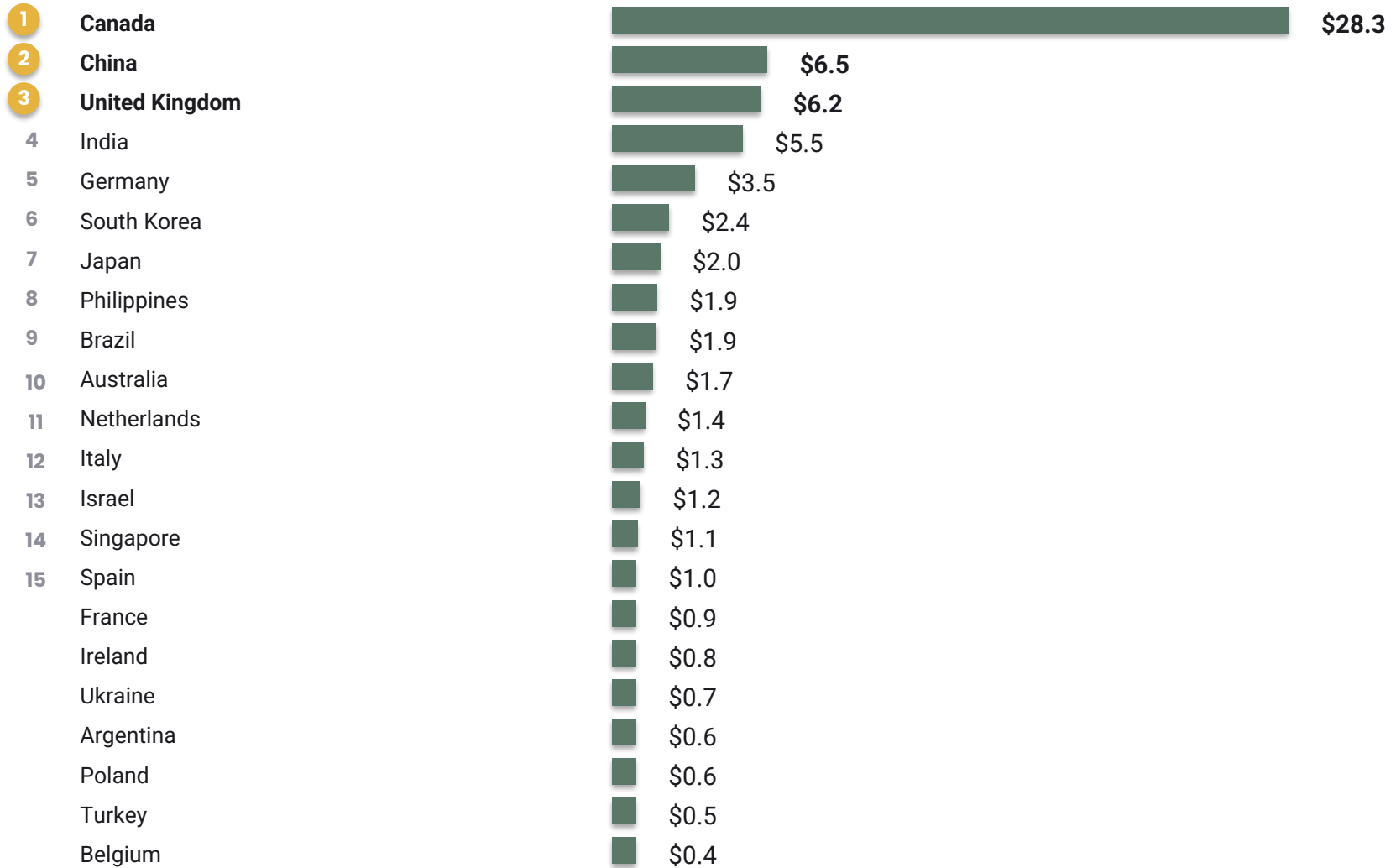
Top Source Markets | 2026 Projections

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	\$28.3	143.8	+7.0%	+5.4%
2	China	\$6.5	1.3	+3.6%	+3.1%
3	United Kingdom	\$6.2	2.6	+1.1%	+2.5%
4	India	\$5.5	1.8	+6.1%	+1.4%
5	Germany	\$3.5	1.2	+7.7%	+3.5%
6	South Korea	\$2.4	1.0	+4.5%	+5.2%
7	Japan	\$2.0	1.6	+6.8%	+7.6%
8	Philippines	\$1.9	0.5	+14.1%	+8.6%
9	Brazil	\$1.9	0.6	+5.8%	+2.2%
10	Australia	\$1.7	0.4	+5.3%	+3.1%
11	Netherlands	\$1.4	0.5	+6.4%	+3.4%
12	Italy	\$1.3	0.5	+3.9%	+1.5%
13	Israel	\$1.2	0.4	+13.1%	+1.6%
14	Singapore	\$1.1	0.3	+15.3%	+8.3%
15	Spain	\$1.0	0.5	+10.1%	+2.4%
16	France	\$0.9	0.6	+3.5%	+1.4%
17	Ireland	\$0.8	0.2	+3.5%	+2.1%
18	Ukraine	\$0.7	0.1	+6.3%	+1.1%
19	Argentina	\$0.6	0.2	+5.5%	+3.0%
20	Poland	\$0.6	0.2	+1.2%	-3.2%
21	Turkey	\$0.5	0.4	+0.4%	+0.9%
22	Belgium	\$0.4	0.2	+6.3%	+3.4%

% Change | 2025 Projections vs. 2024

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

#	Market	Spending %Δ	Visits %Δ
1	Canada	-14.7%	-21.4%
2	China	+5.5%	-2.2%
3	United Kingdom	+15.5%	+2.8%
4	India	-5.3%	-5.0%
5	Germany	+6.8%	-10.6%
6	South Korea	-15.1%	-4.2%
7	Japan	+11.5%	+5.7%
8	Philippines	-9.7%	-15.4%
9	Brazil	+16.2%	+2.6%
10	Australia	-11.4%	-0.9%
11	Netherlands	+14.2%	-5.8%
12	Italy	+15.6%	+8.2%
13	Israel	-4.1%	+17.8%
14	Singapore	-2.5%	-7.0%
15	Spain	+15.4%	+4.5%
16	France	-1.0%	-4.5%
17	Ireland	-0.7%	+3.4%
18	Ukraine	+34.9%	+8.2%
19	Argentina	+15.1%	+17.2%
20	Poland	-1.4%	+5.9%
21	Turkey	+24.8%	+5.0%
22	Belgium	-8.3%	-6.4%

 Decline  Growth

Growth Trajectory

2015-2019 CAGR

-5.3%

Spending

-2.7%

Visits

2023-2027 PROJECTED CAGR

7.5%

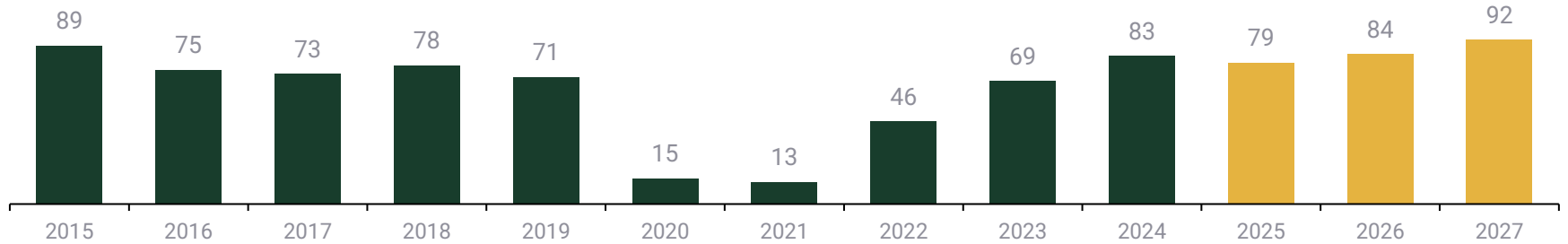
Spending

-2.1%

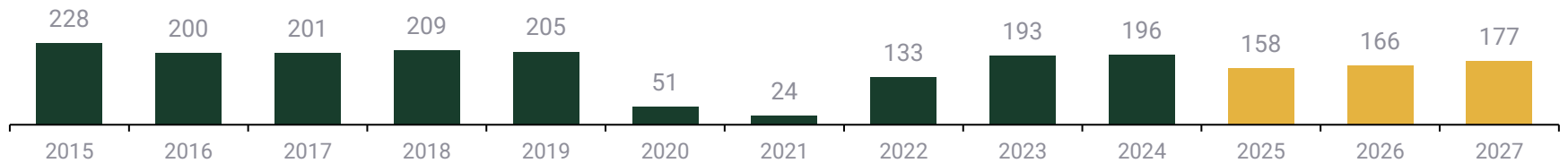
Visits

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

China

4.2%

GDP % Change

6.84

CNY/USD

United Kingdom

1.3%

GDP % Change

1.35

GBP/USD

India

6.2%

GDP % Change

90.92

INR/USD

Germany

0.9%

GDP % Change

1.18

EUR/USD

South Korea

1.8%

GDP % Change

1,433.32

KRW/USD

Japan

0.6%

GDP % Change

156.13

JPY/USD

Philippines

5.7%

GDP % Change

—

Brazil

1.9%

GDP % Change

5.15

BRL/USD

Australia

2.1%

GDP % Change

0.71

AUD/USD

Visitor Perceptions | The American South

International Markets

67%

Familiarity

75%

Appeal

29%

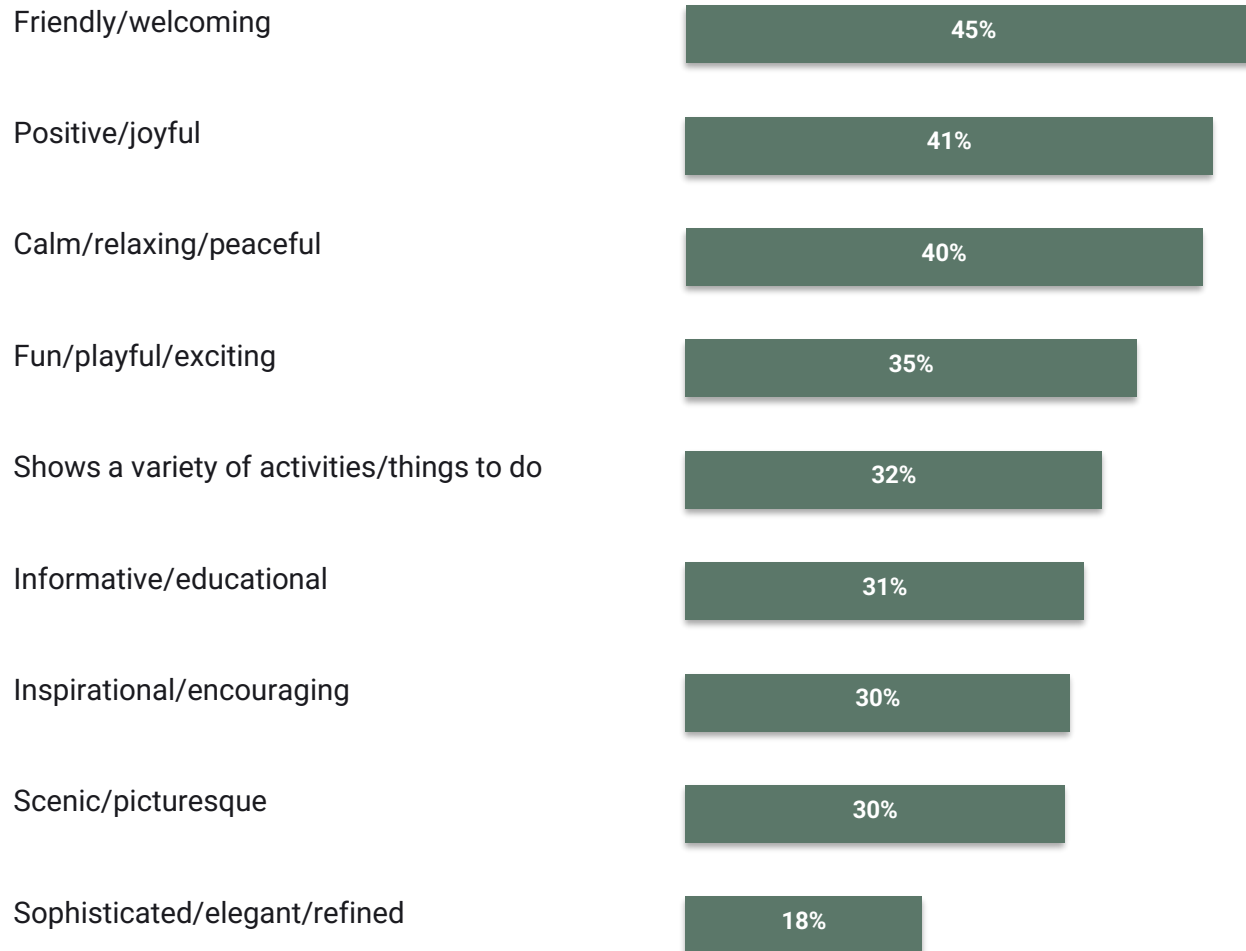
Promotional Buzz

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

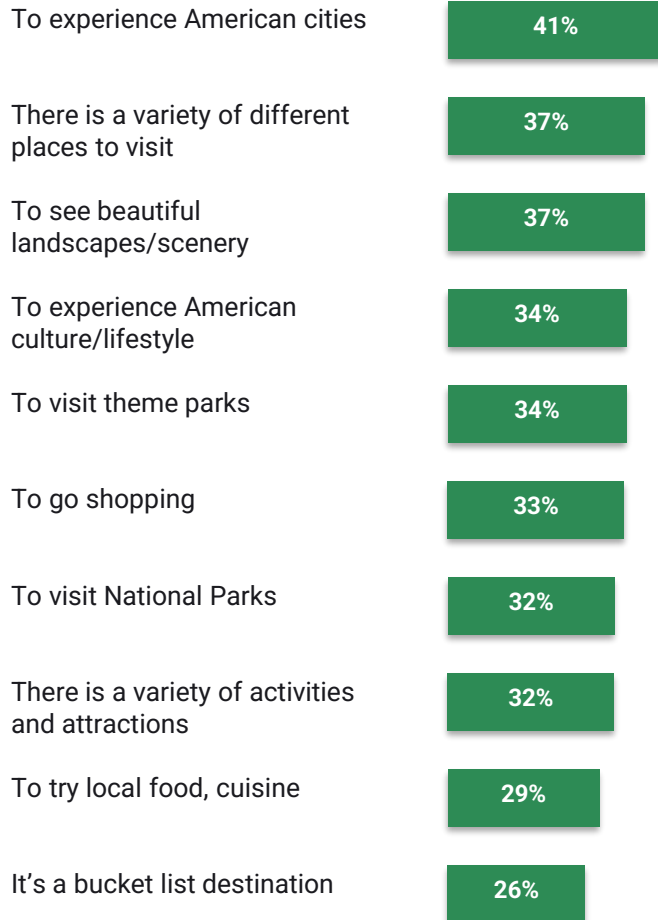
Total

Intl: \$5,049

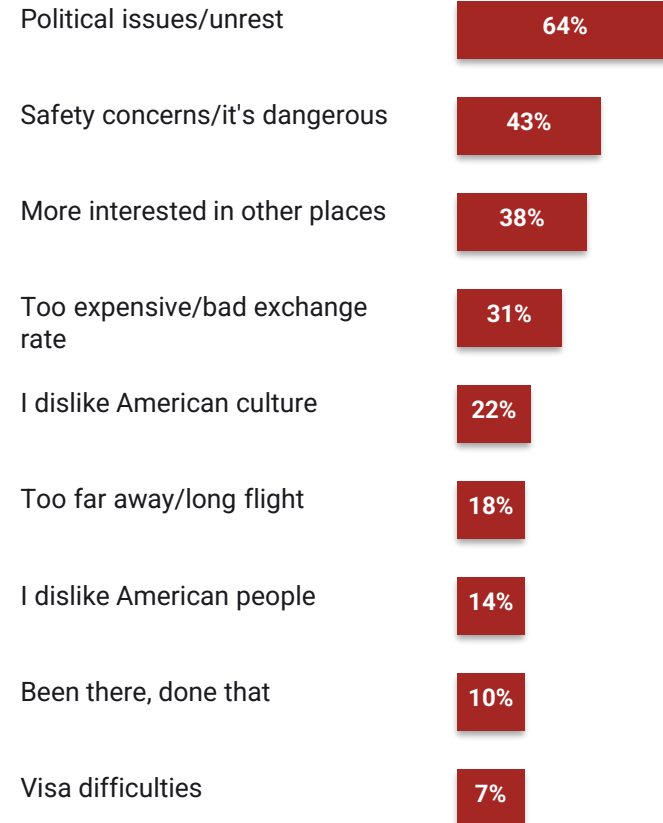
Enablers & Barriers to Visiting

International Markets

Enablers

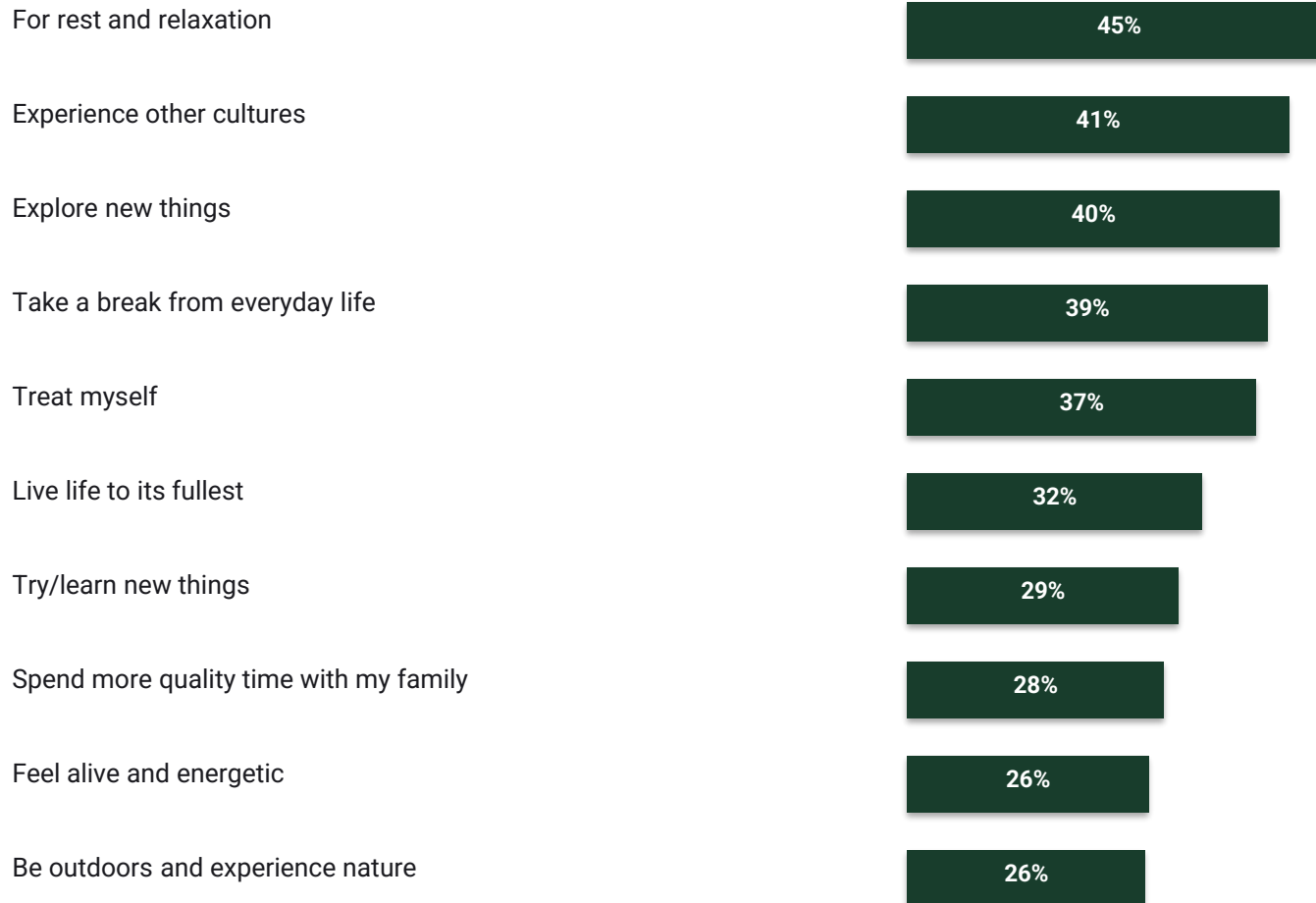


Barriers



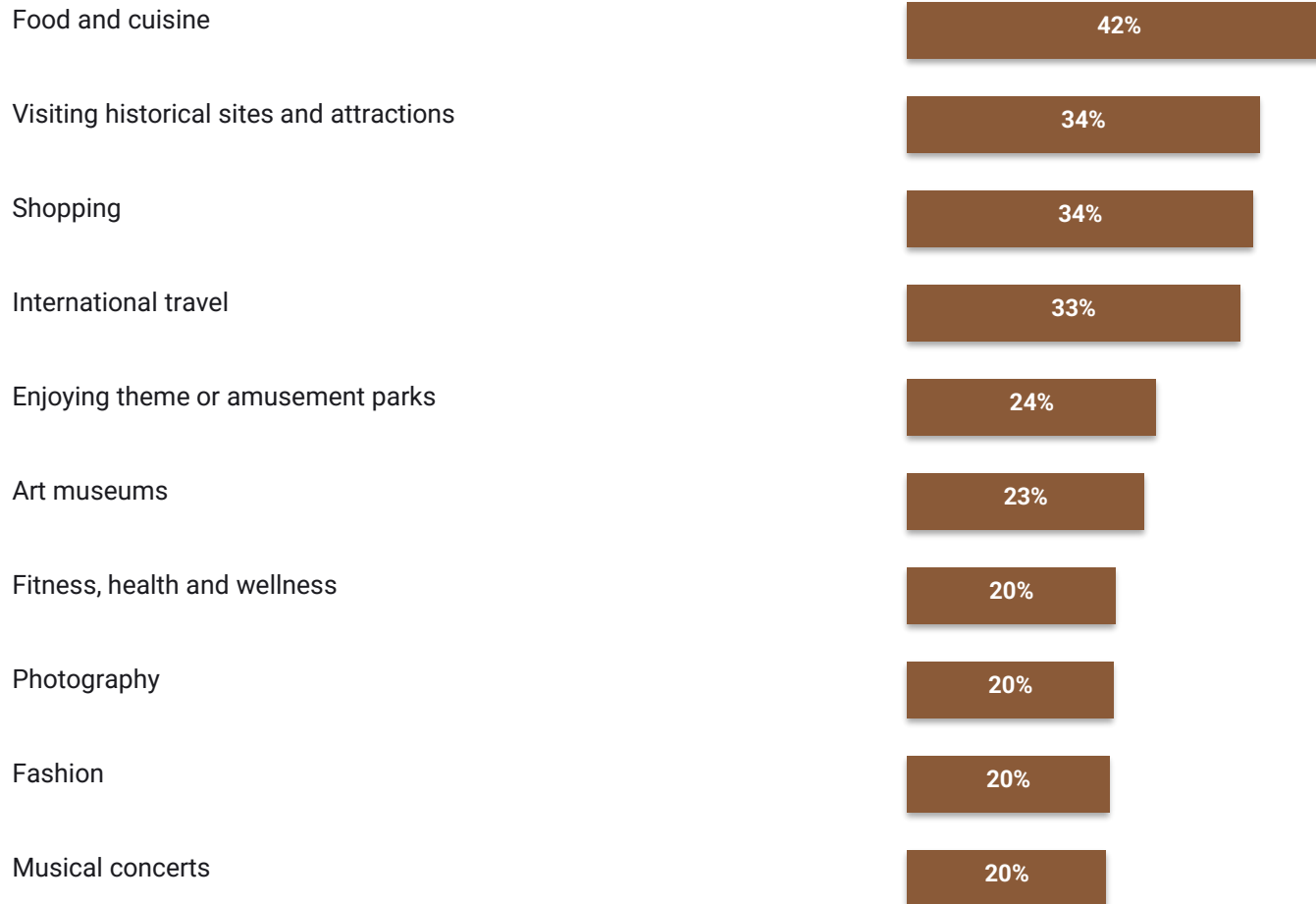
Travel Motivations

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 | West Virginia

#1 by Spending | #1 by Visits

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Canada | Key Findings

- 1 2026 West Virginia projected spending:** \$28.3M (+7.2% YOY). Projected visitors: 143.8K (+5.4% YOY). Ranks #1 by spending and #1 by visits among West 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 (3.1%) exceeds 2015-2019 (-2.4%).
- 4 Visitor Perceptions:** 66% familiarity with the American South, 70% appeal, 38% likely to visit in the next 5 years.
- 5 U.S. Trip Profile:** Average spending \$2,949 for a 2-week trip. Average length of stay: 8.4 days. Average destinations: 2.8.
- 6 Top Motivation:** Treat myself (49%)
- 7 Top Enabler:** To visit friends and/or family (39%)
- 8 Preferred Tone:** Friendly/welcoming (54%)
- 9 Top Barrier:** Political issues/unrest (90%)

Canada

\$28.3M

2026 West Virginia Spending

+7.2% YOY vs. 2025

143.8K

2026 West Virginia Visitors

+5.4% YOY vs. 2025

\$16.4B

2026 USA Spending

+7.6% YOY vs. 2025

20.9M

2026 USA Visitors

+6.6% YOY vs. 2025

\$26.4M

2025 West Virginia Spending

-14.8% YOY vs. 2024

136.4K

2025 West Virginia Visitors

-21.4% 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

-2.4%

Spending

-3.1%

Visits

2023-2027 PROJECTED CAGR

3.1%

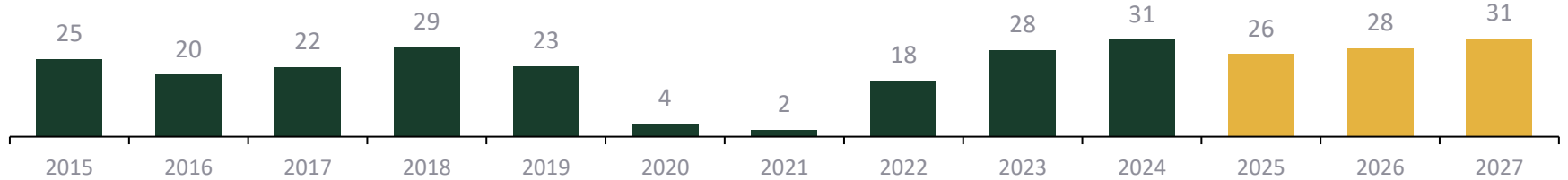
Spending

-3.1%

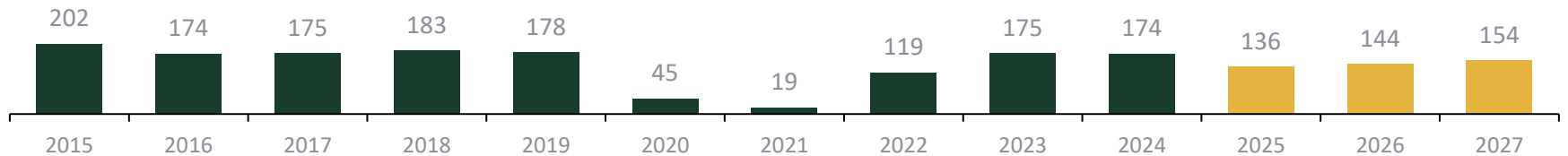
Visits

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%

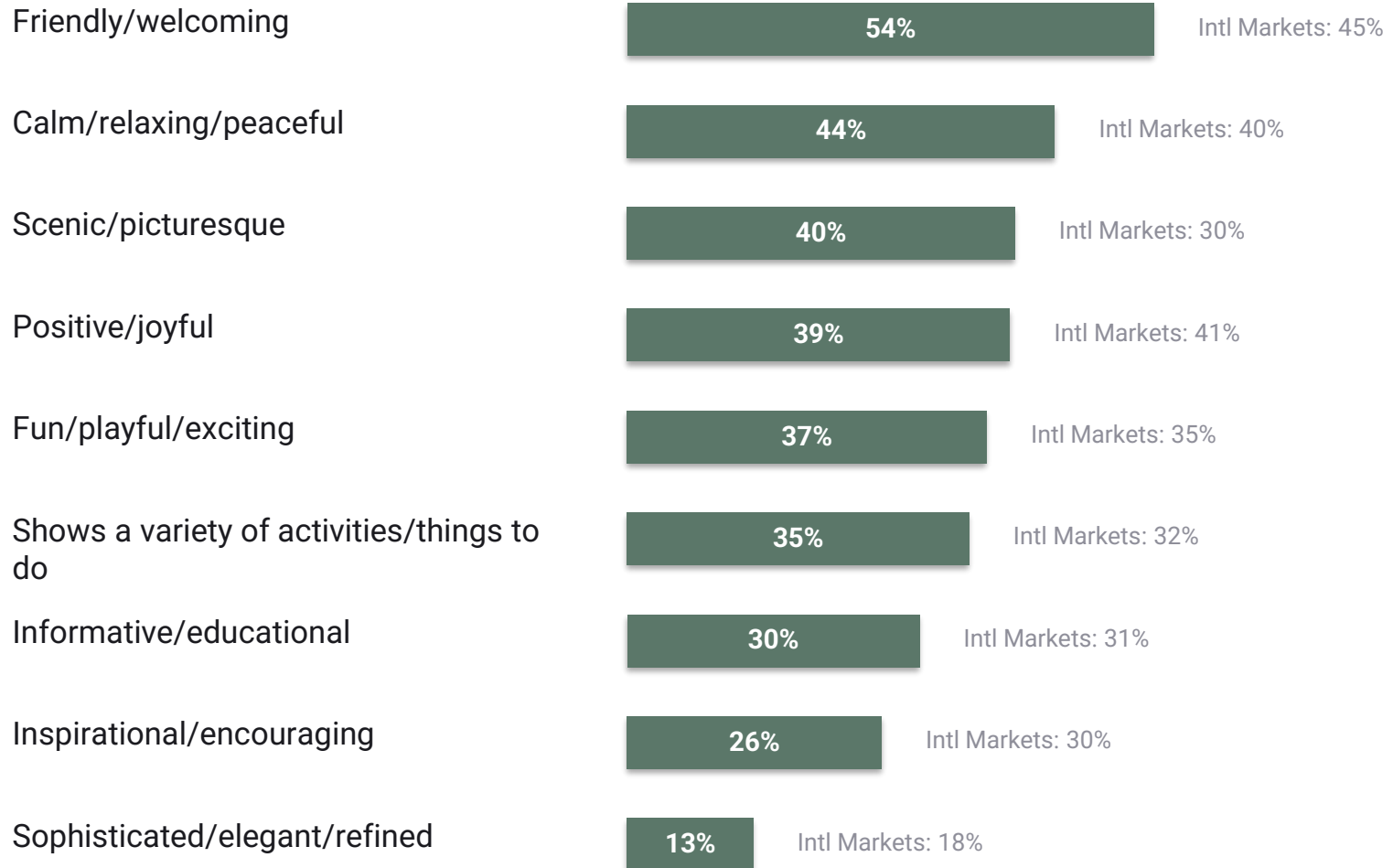
38%

Likely to Visit (5yr)

Intl Markets: 41%

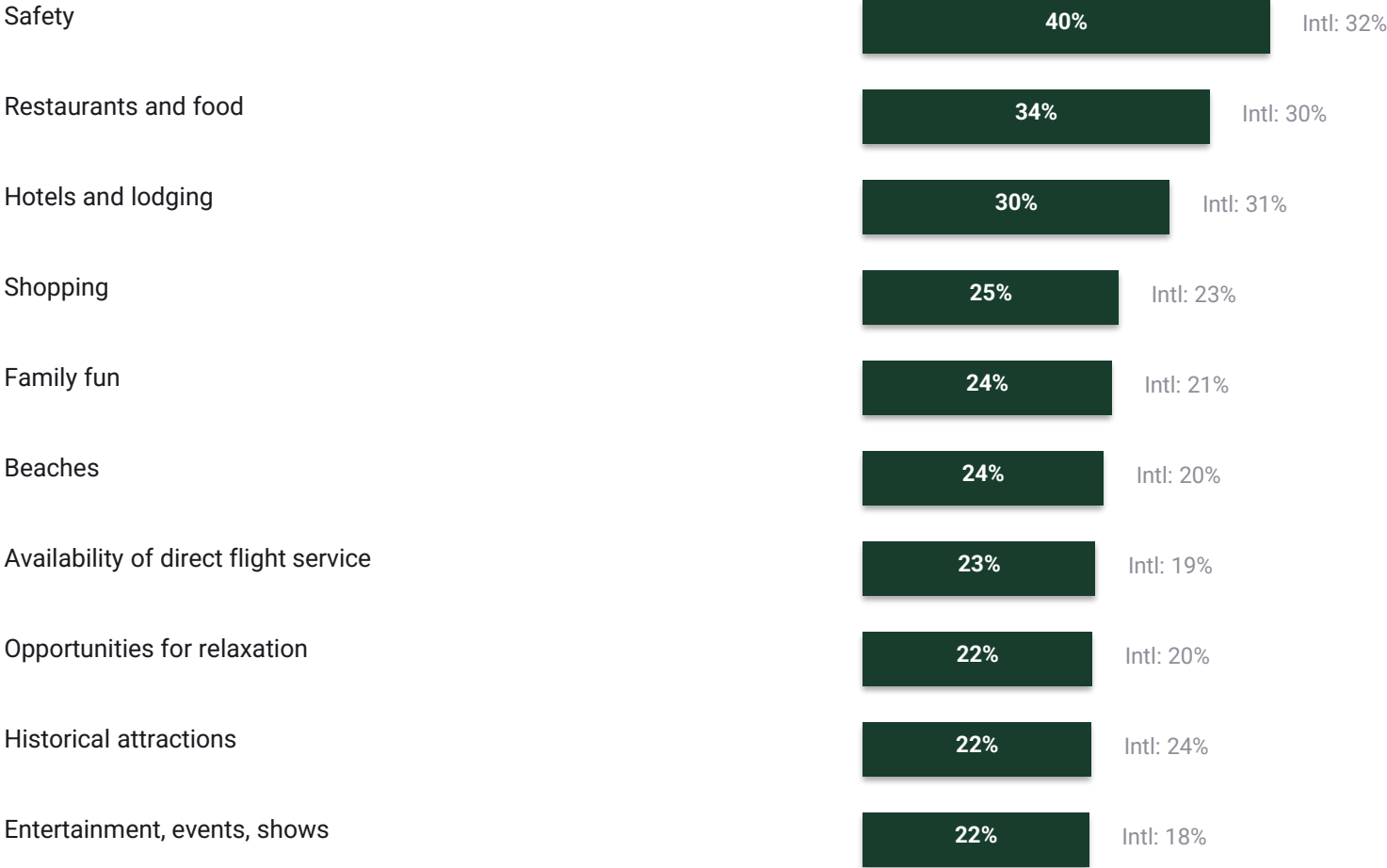
Desired Travel Promotion Tone

Canada



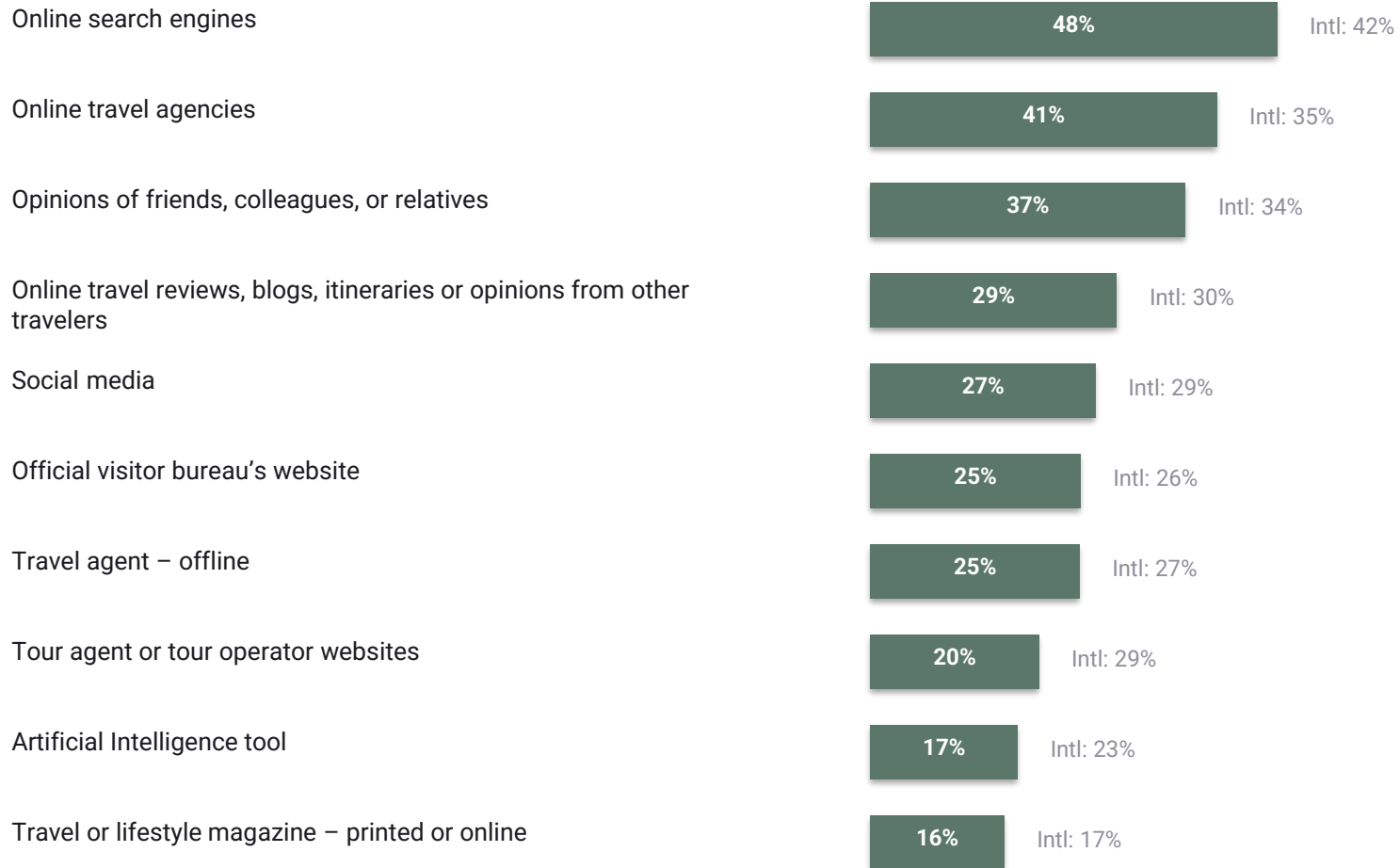
Top Information Sources

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

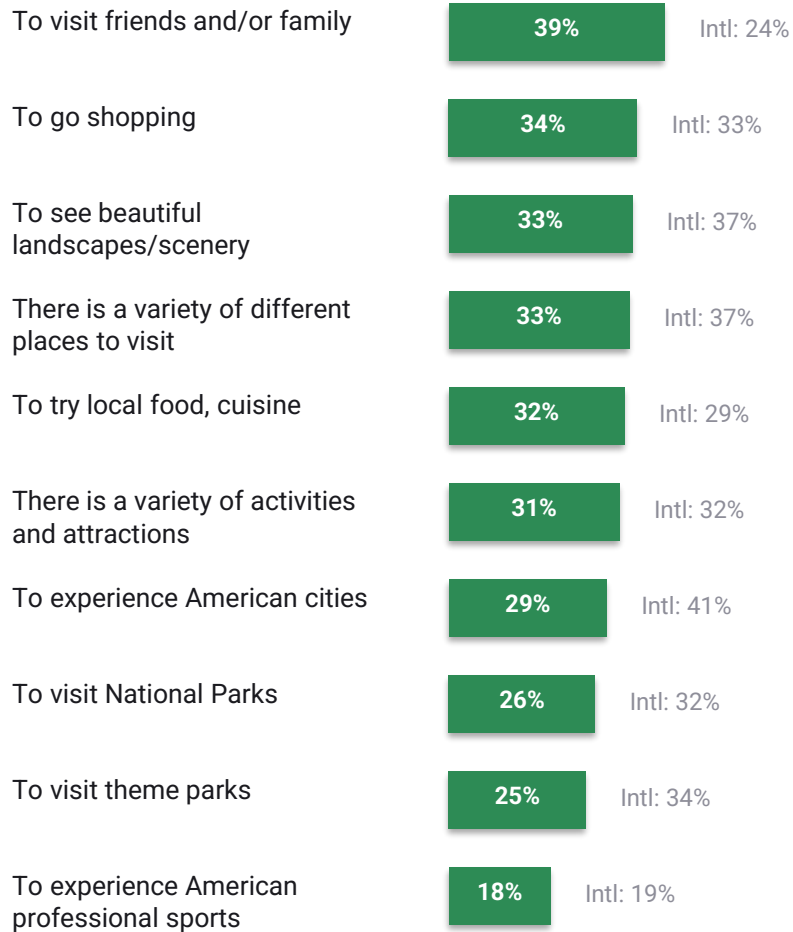
Total

Intl: \$5,049

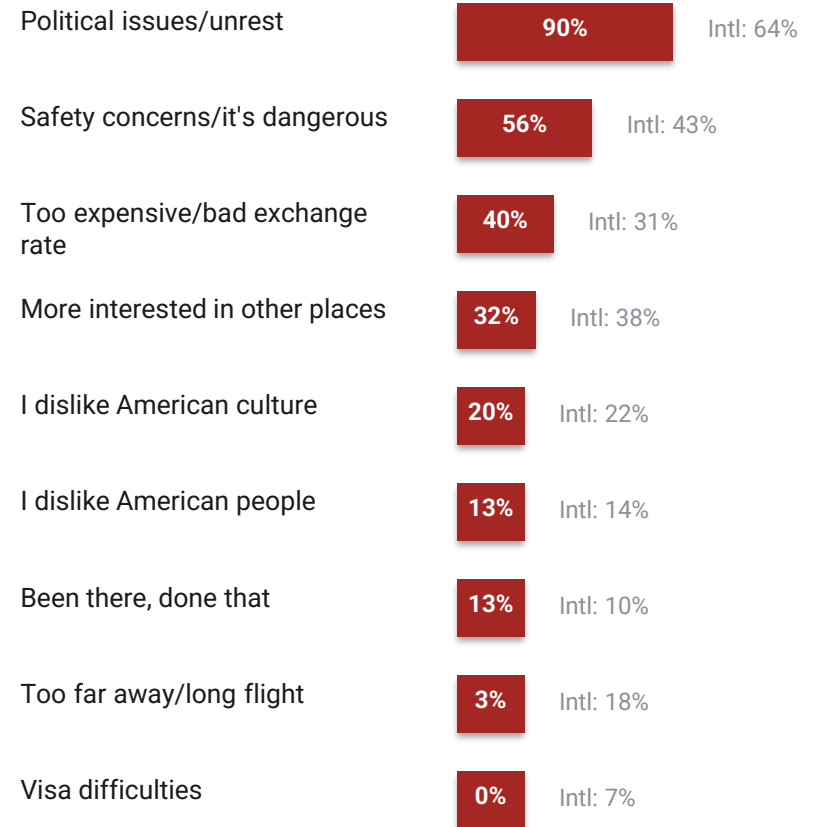
Enablers & Barriers to Visiting

Canada

Enablers

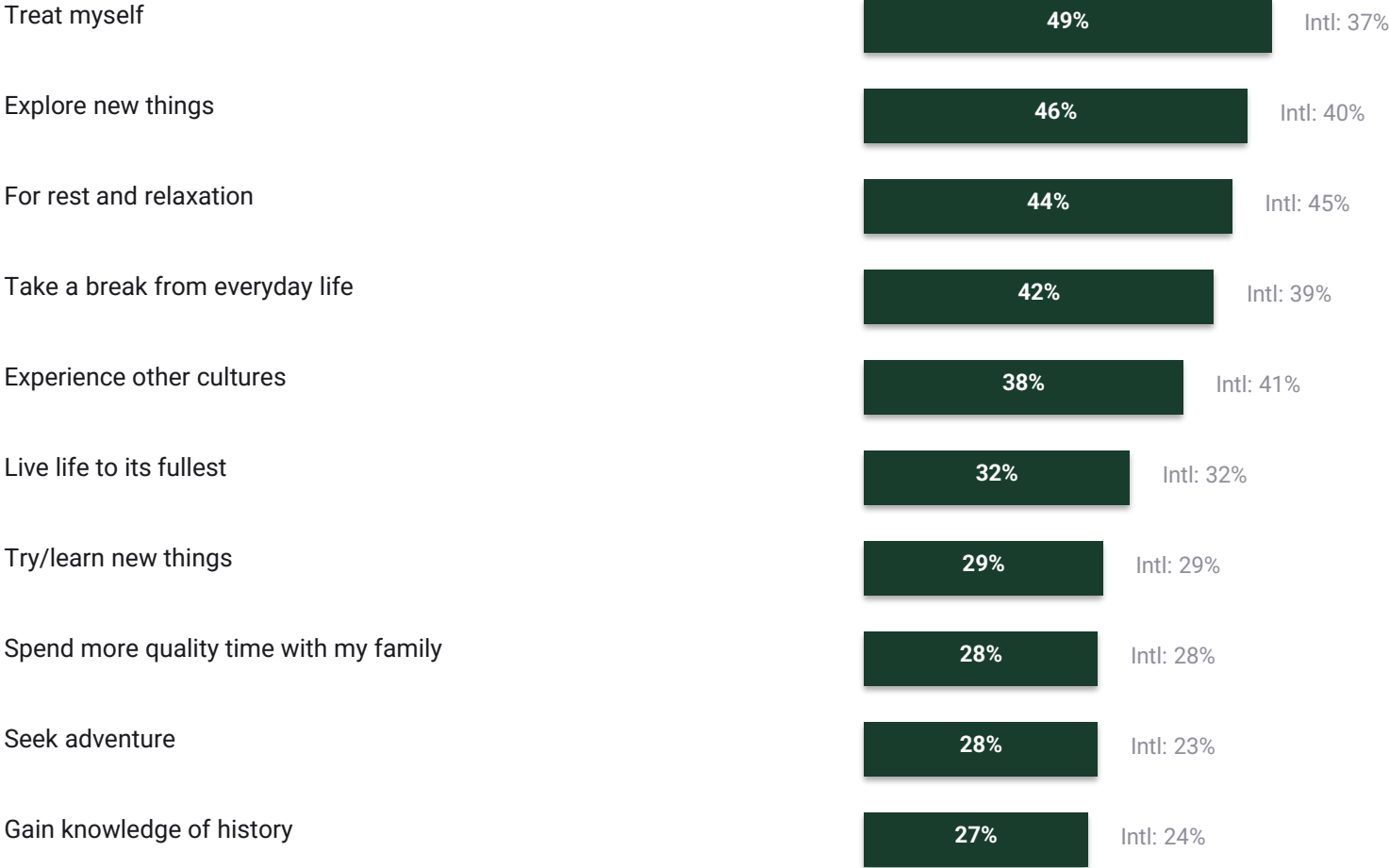


Barriers



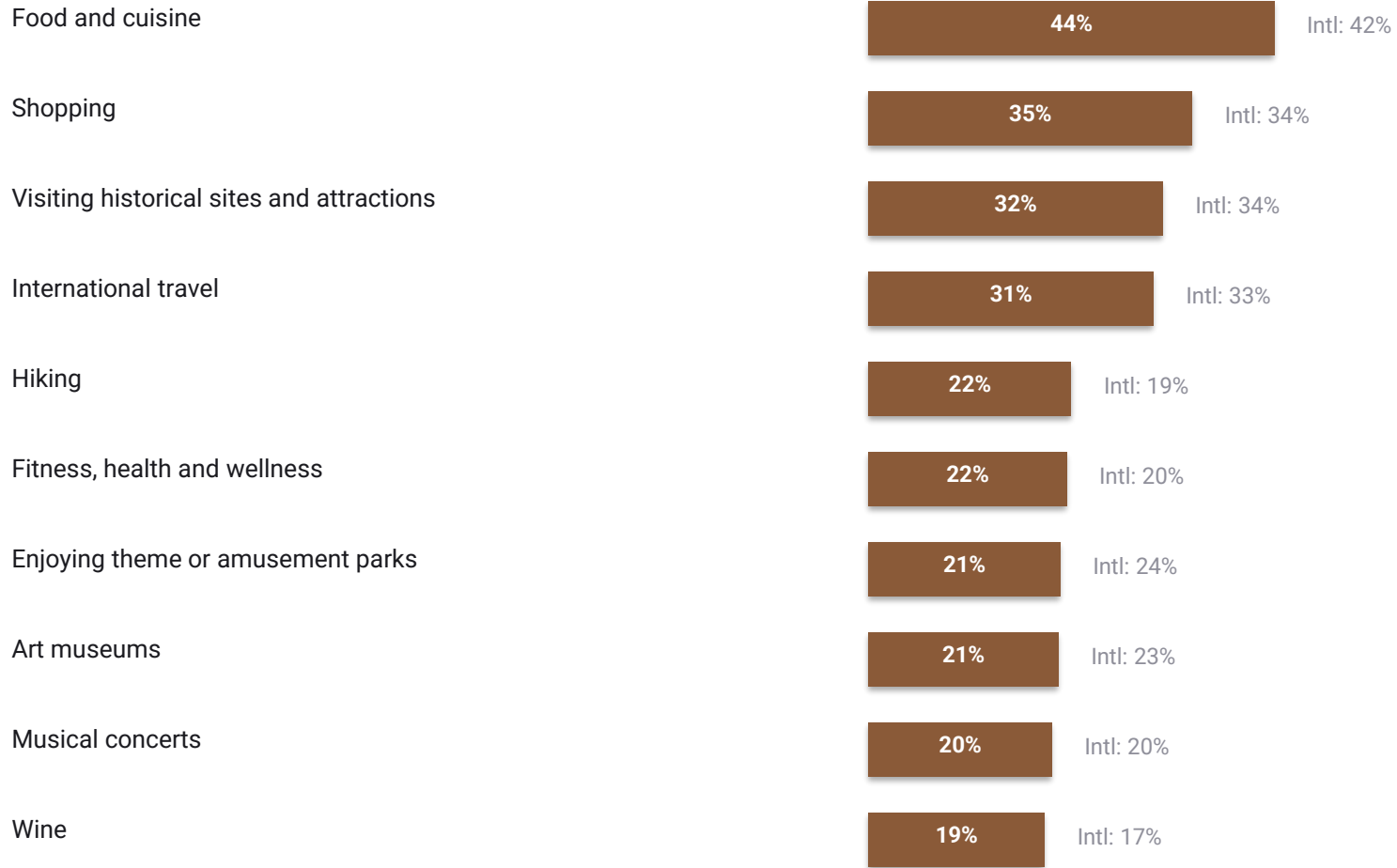
Travel Motivations

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

CHINA

Source Market Analysis | West Virginia

#2 by Spending | #5 by Visits

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China | Key Findings

- 1 2026 West Virginia projected spending:** \$6.5M (+3.2% YOY). Projected visitors: 1.3K (+8.3% YOY). Ranks #2 by spending and #5 by visits among West 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 (26%) exceeds 2015-2019 (-15.7%).
- 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

\$6.5M

2026 West Virginia Spending

+3.2% YOY vs. 2025

1.3K

2026 West Virginia Visitors

+8.3% YOY vs. 2025

\$8.8B

2026 USA Spending

+4.8% YOY vs. 2025

2.8M

2026 USA Visitors

+4.8% YOY vs. 2025

\$6.3M

2025 West Virginia Spending

+6.8% YOY vs. 2024

1.2K

2025 West Virginia Visitors

-7.7% 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

-15.7%

Spending

-1.2%

Visits

2023-2027 PROJECTED CAGR

26%

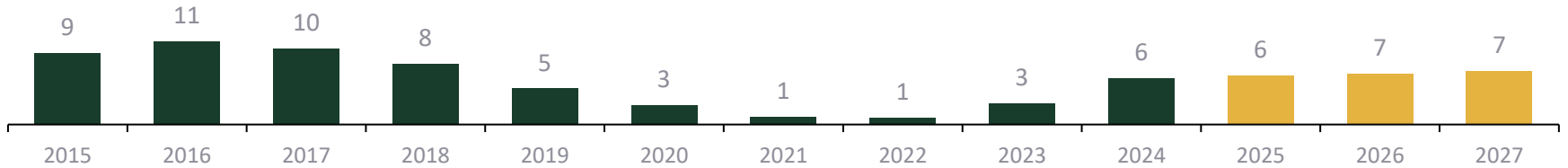
Spending

15%

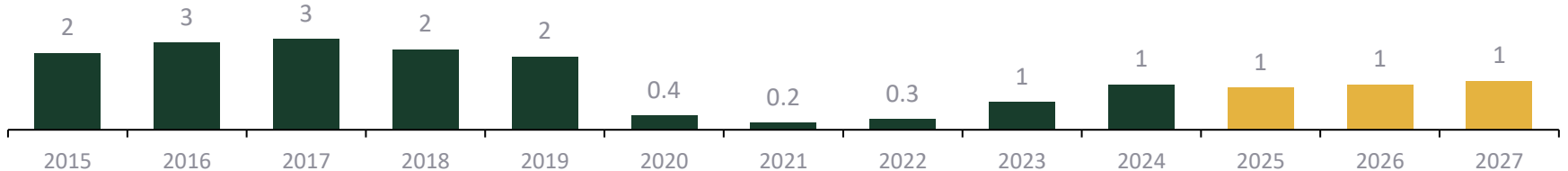
Visits

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%

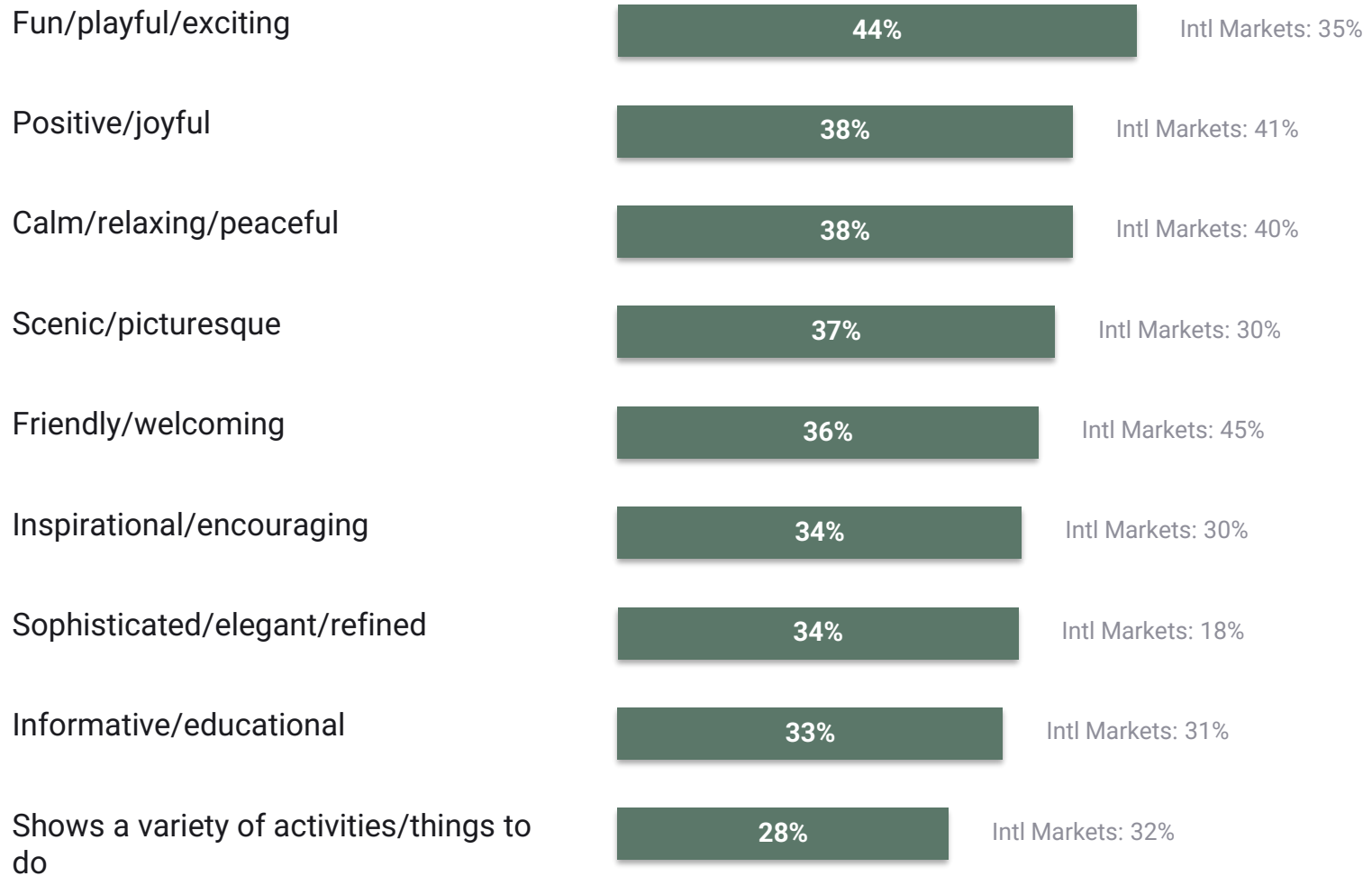
54%

Likely to Visit (5yr)

Intl Markets: 41%

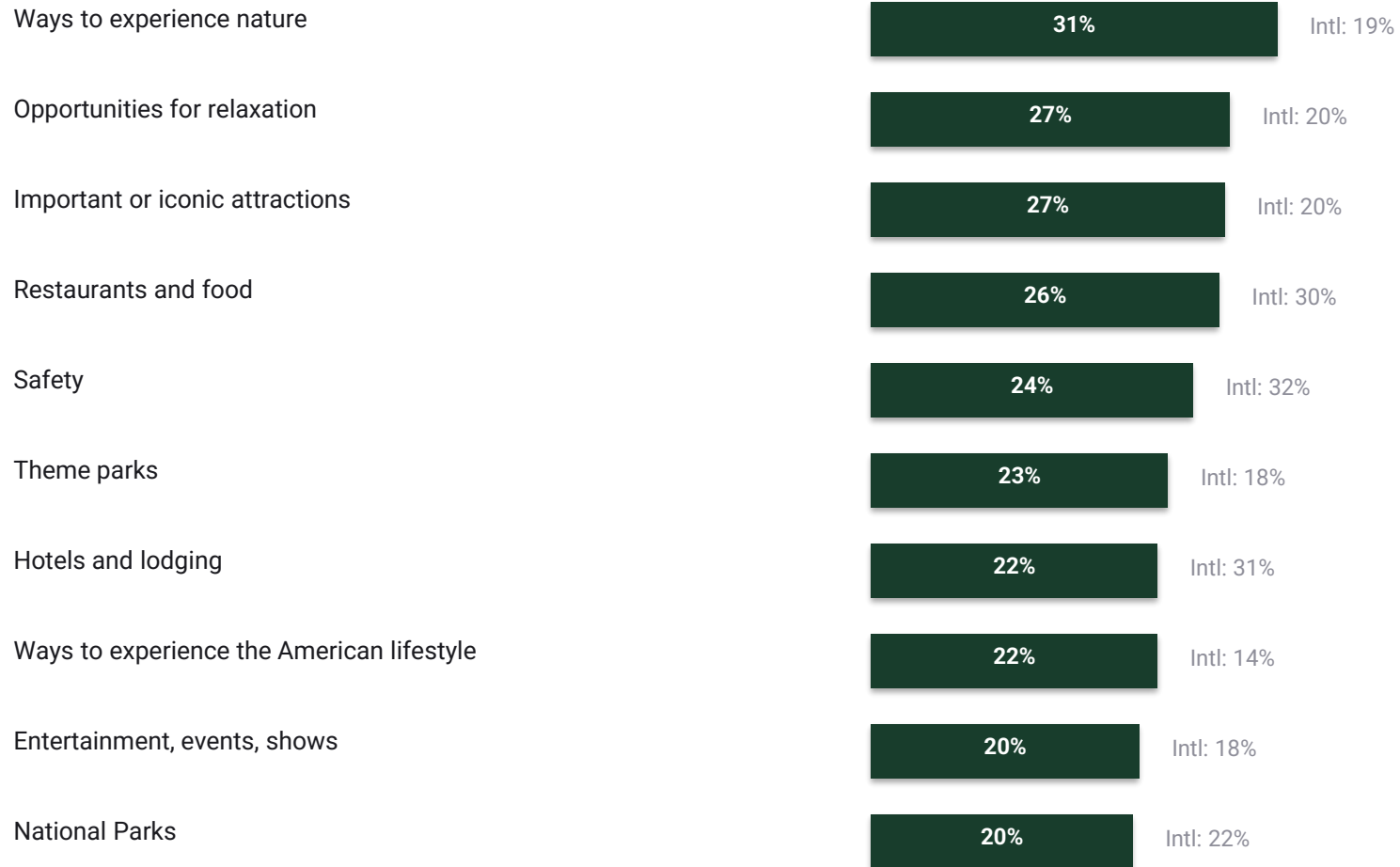
Desired Travel Promotion Tone

China



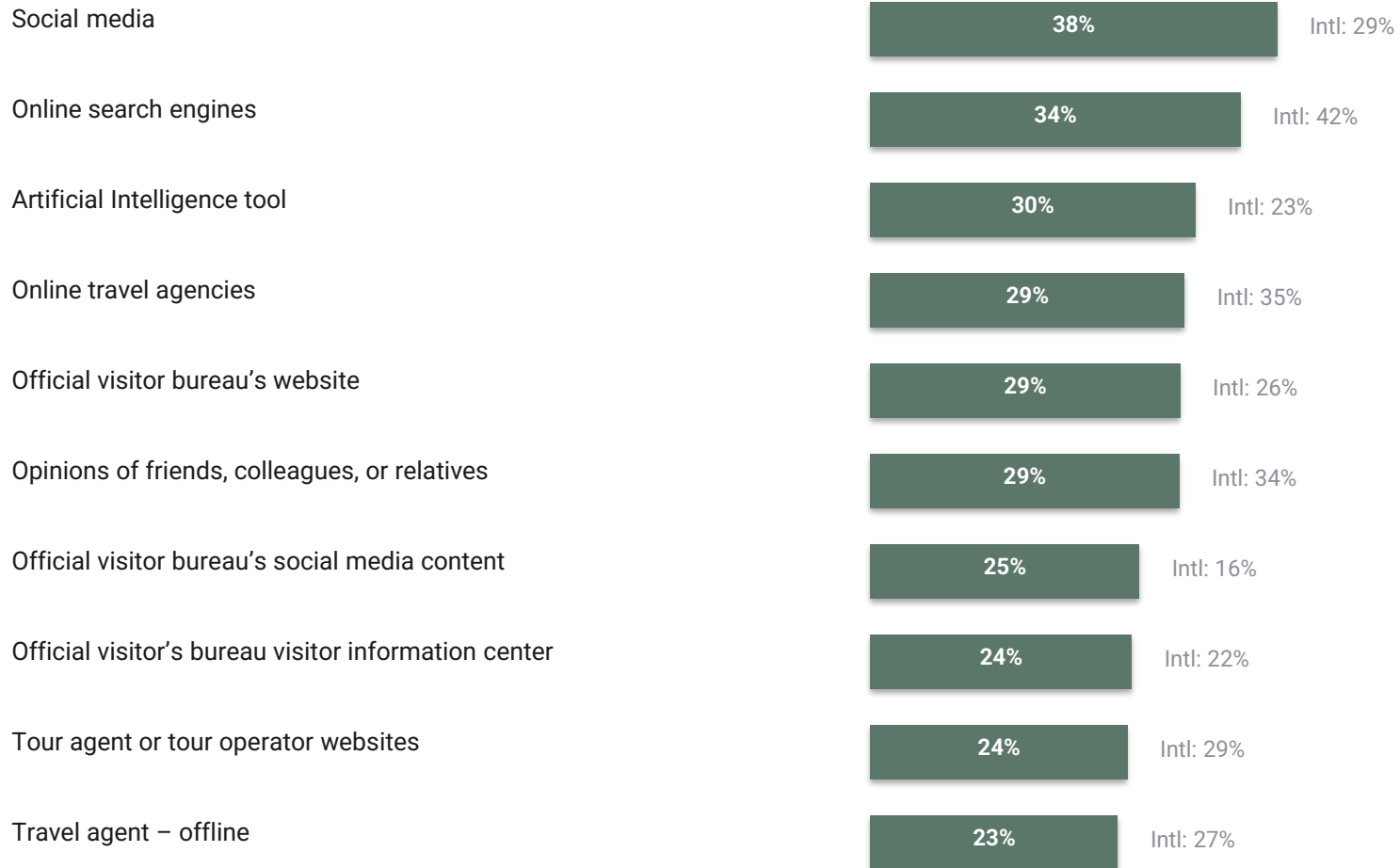
Top Information Sources

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

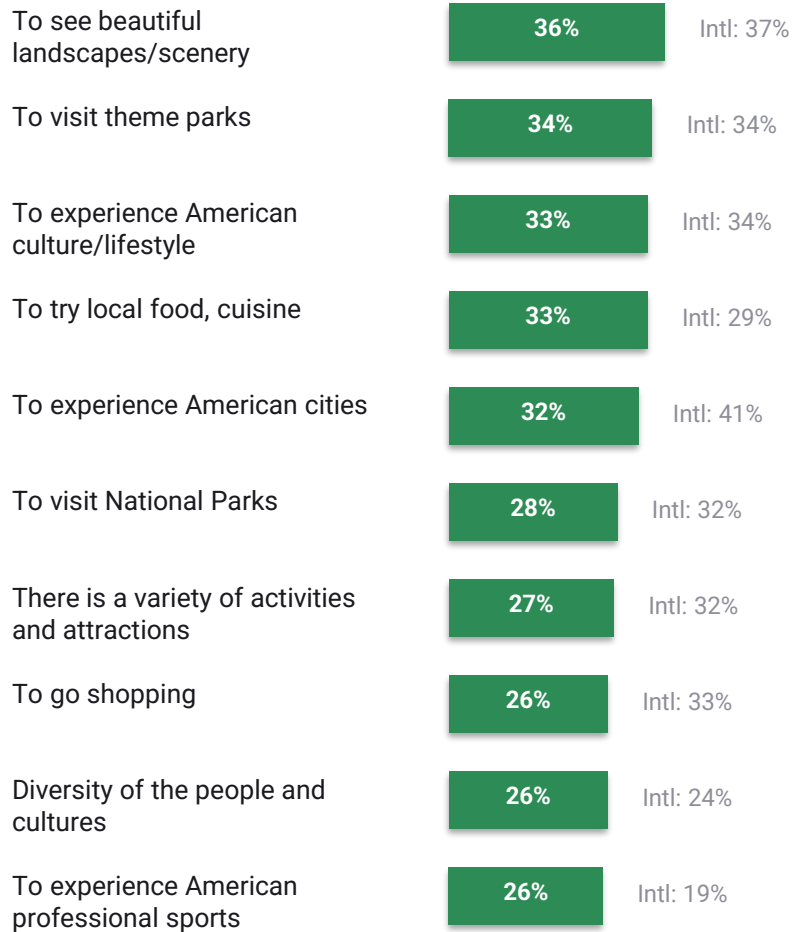
Total

Intl: \$5,049

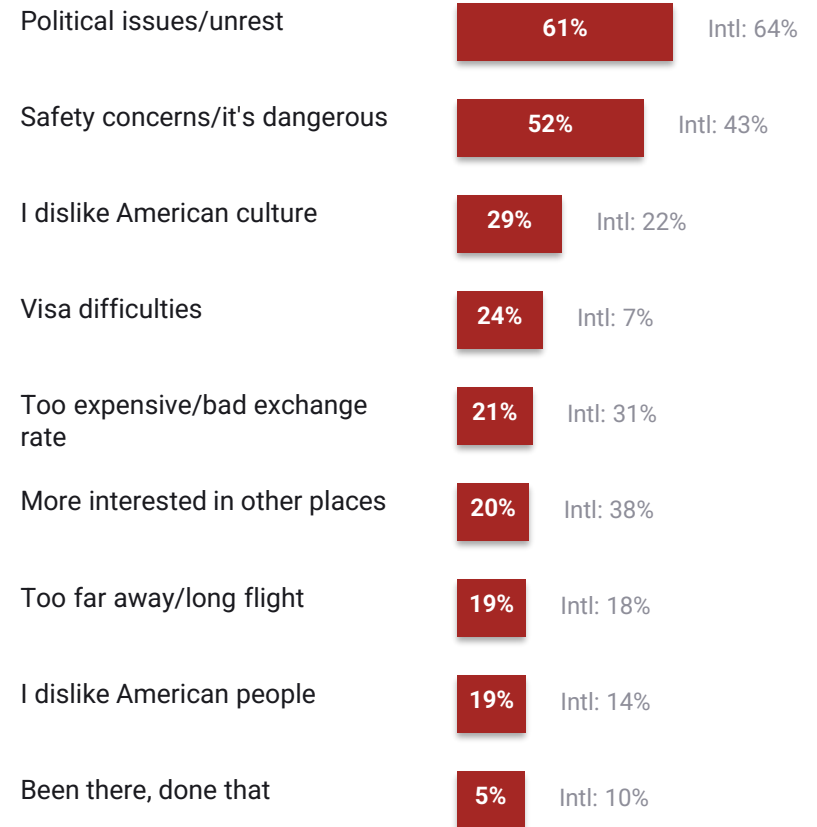
Enablers & Barriers to Visiting

China

Enablers

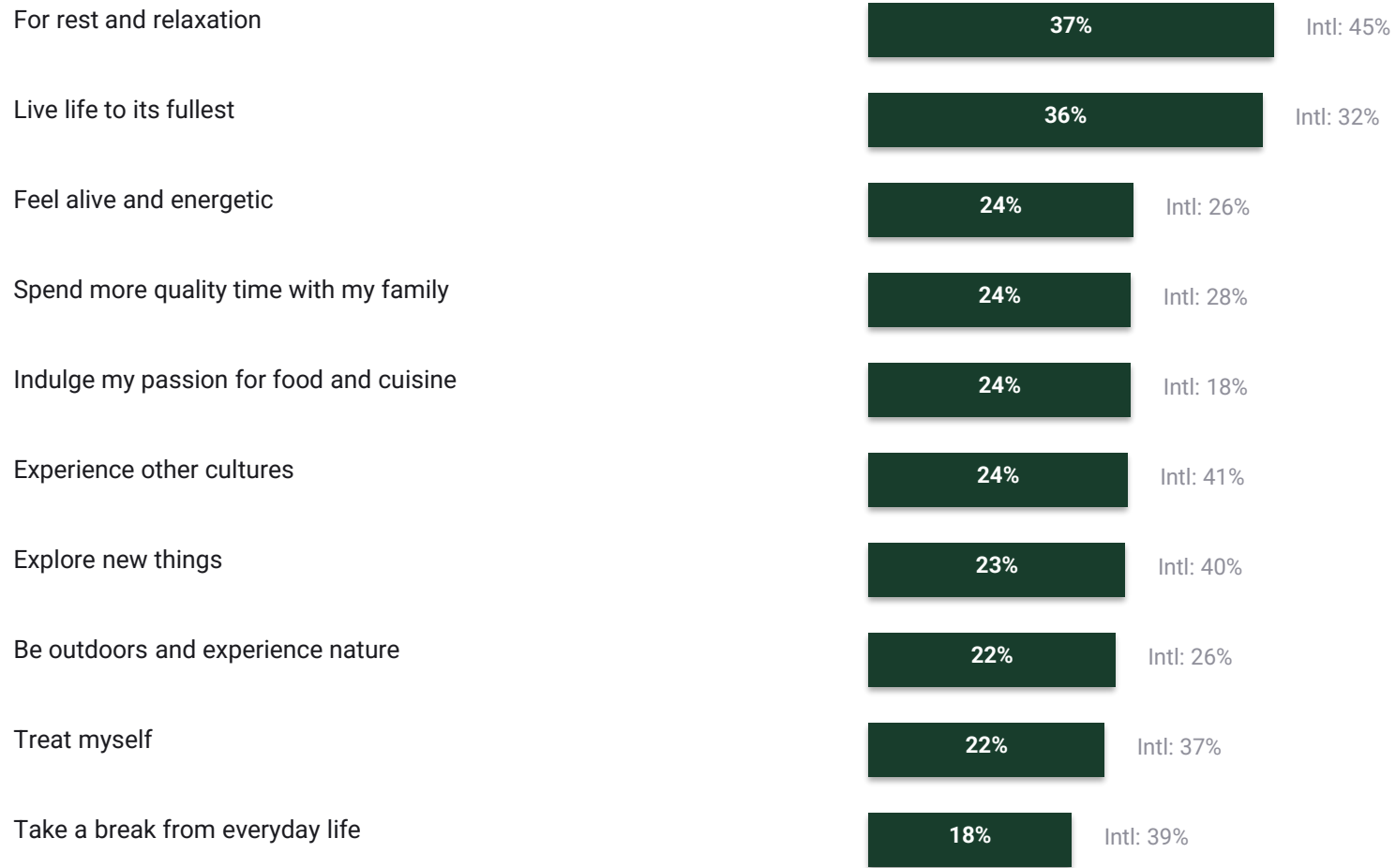


Barriers



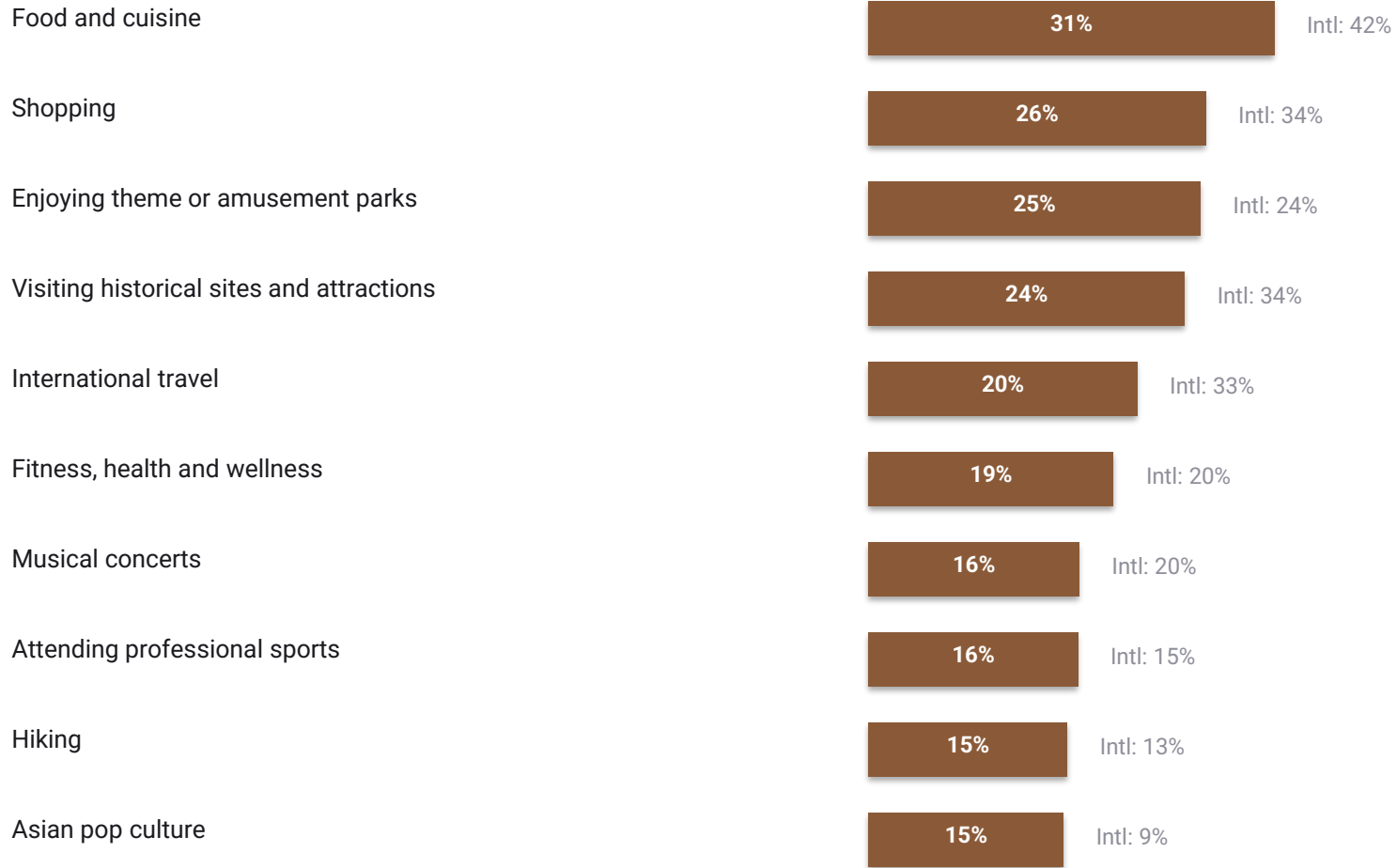
Travel Motivations

China



Hobbies & Passions

China



Travel Trends & Outlook

China

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66%



Intl: 44%

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61%



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60%



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60%



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59%



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Intl: 42%

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

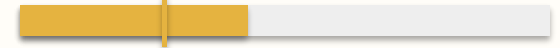
47%



Intl: 34%

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

43%



Intl: 27%

China

Intl Markets

UNITED KINGDOM

Source Market Analysis | West Virginia

#3 by Spending | #2 by Visits

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All Y'all Are Welcome USA

United Kingdom | Key Findings

- 1 2026 West Virginia projected spending:** \$6.2M (+1.6% YOY). Projected visitors: 2.6K (+4% YOY). Ranks #3 by spending and #2 by visits among West 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 (8.3%) exceeds 2015-2019 (-7.2%).
- 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

\$6.2M

2026 West Virginia Spending

+1.6% YOY vs. 2025

2.6K

2026 West Virginia Visitors

+4% YOY vs. 2025

\$11.9B

2026 USA Spending

+3.3% YOY vs. 2025

5.8M

2026 USA Visitors

+3.5% YOY vs. 2025

\$6.1M

2025 West Virginia Spending

+15.1% YOY vs. 2024

2.5K

2025 West Virginia Visitors

0% 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

-7.2%

Spending

1.7%

Visits

2023-2027 PROJECTED CAGR

8.3%

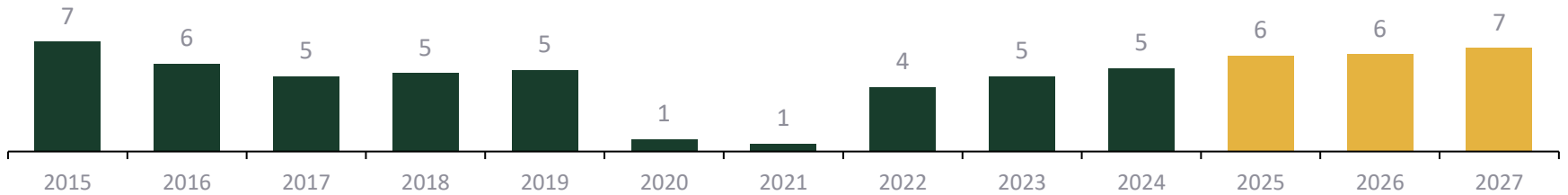
Spending

4.1%

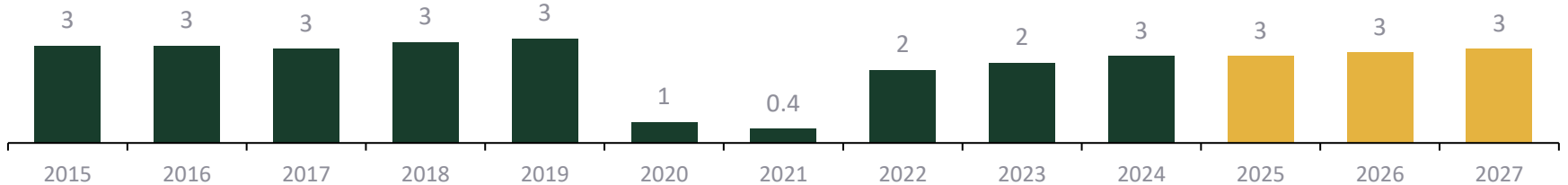
Visits

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%

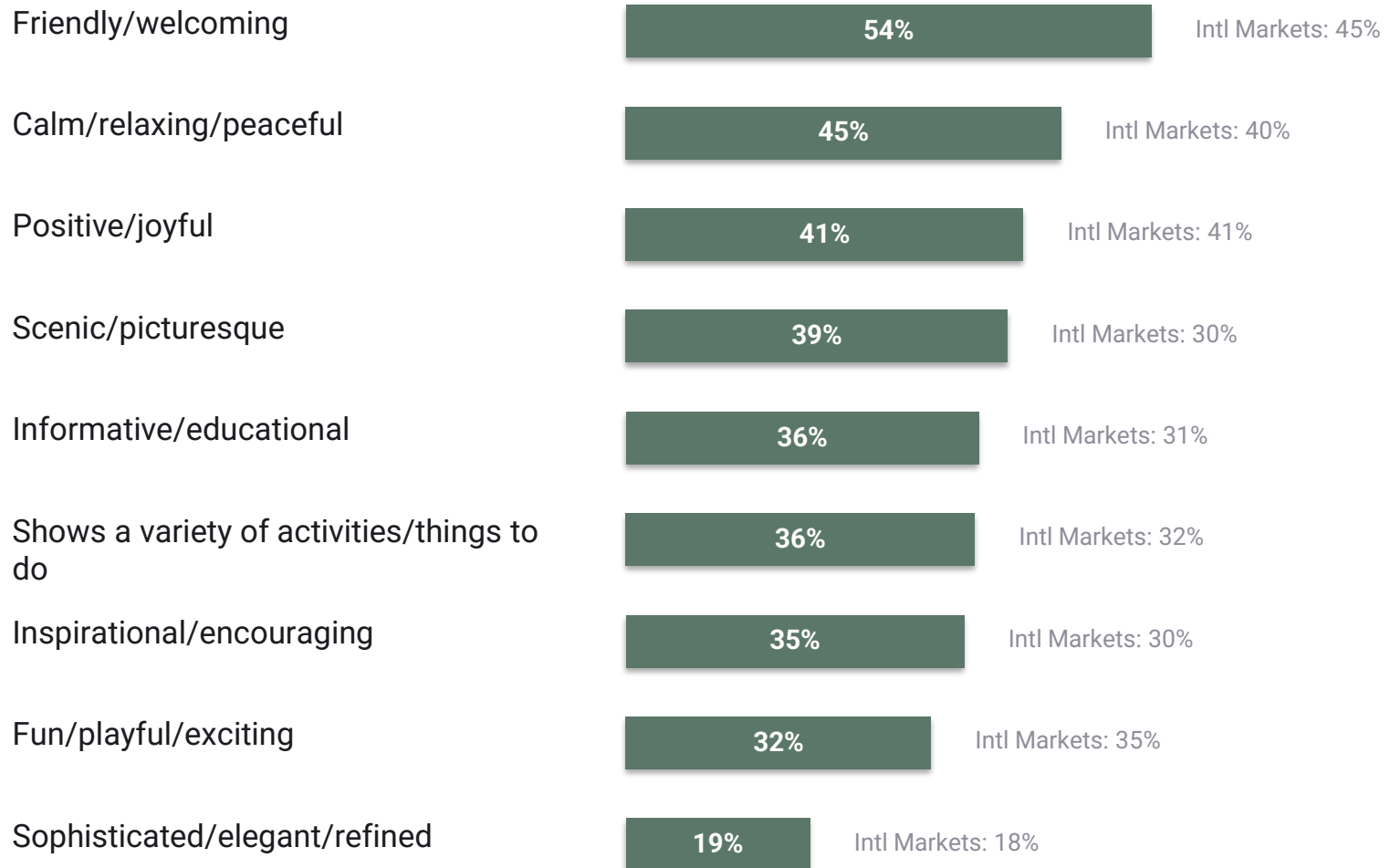
41%

Likely to Visit (5yr)

Intl Markets: 41%

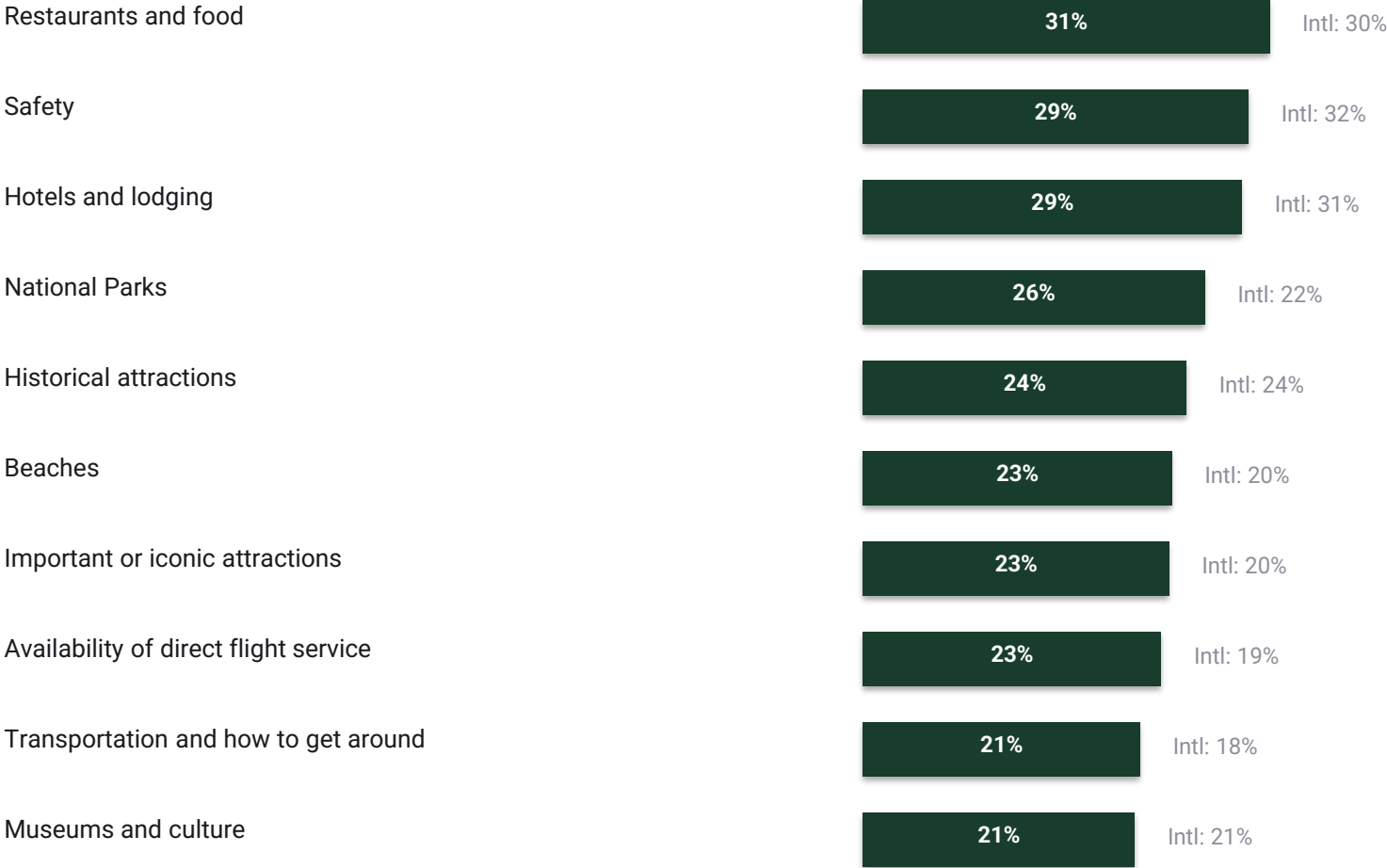
Desired Travel Promotion Tone

United Kingdom



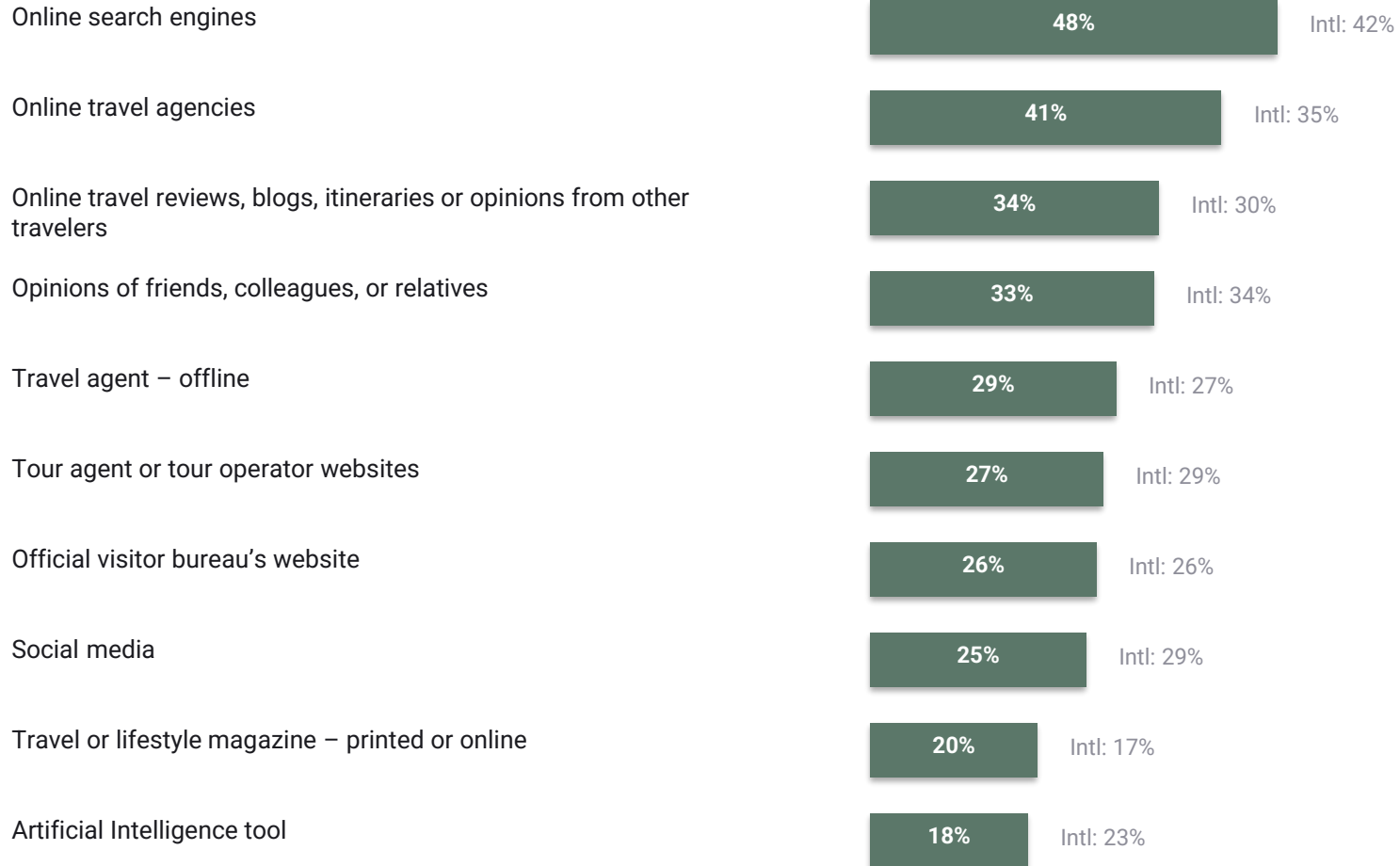
Top Information Sources

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

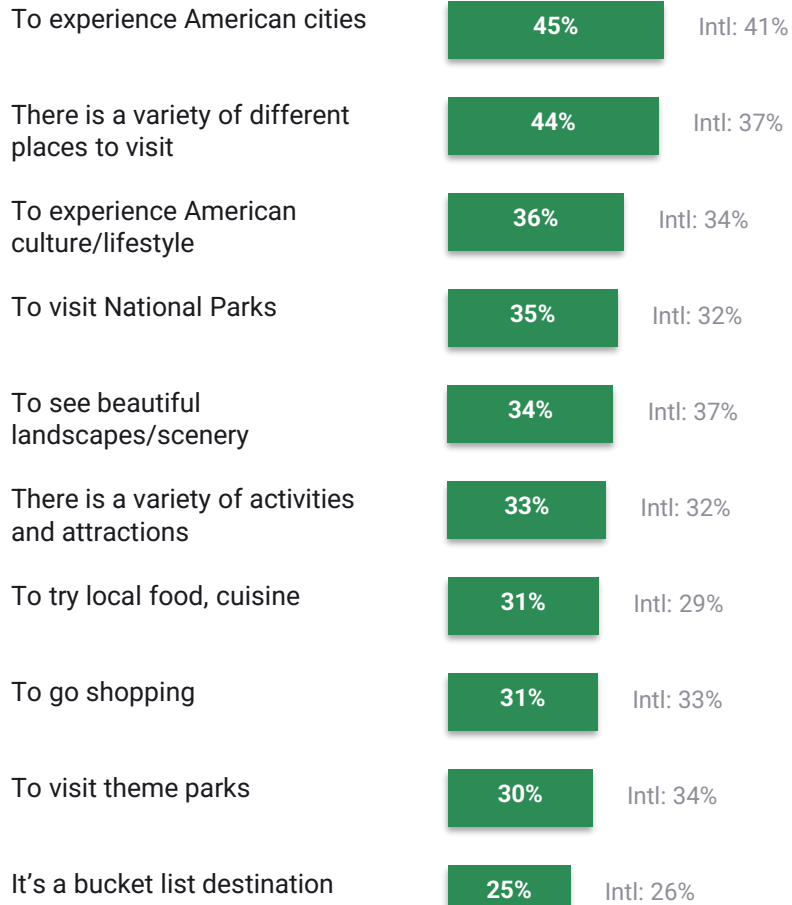
Total

Intl: \$5,049

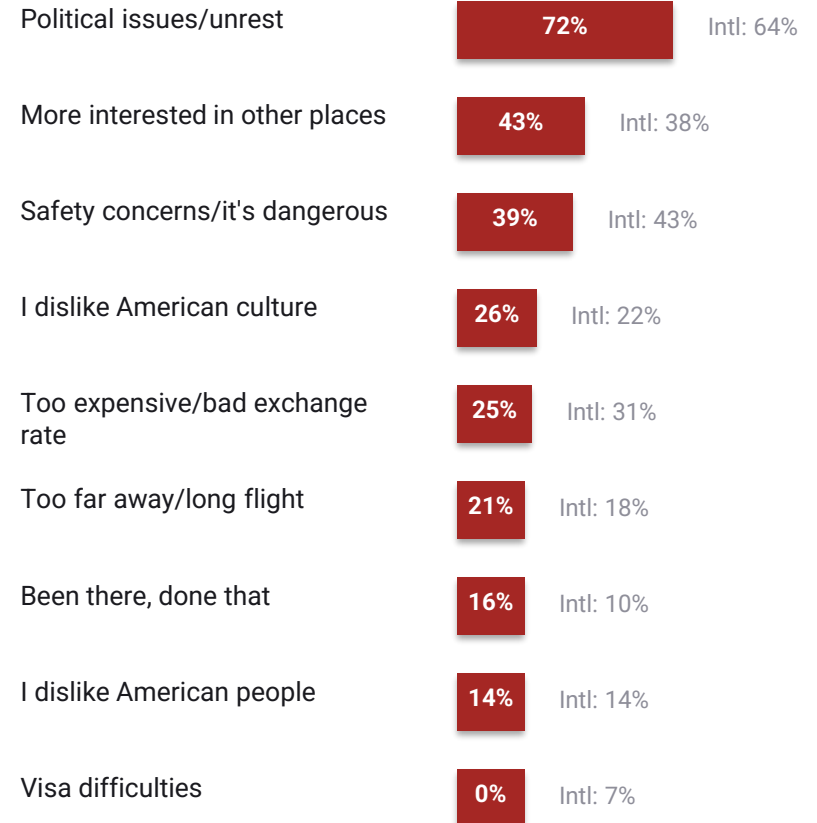
Enablers & Barriers to Visiting

United Kingdom

Enablers

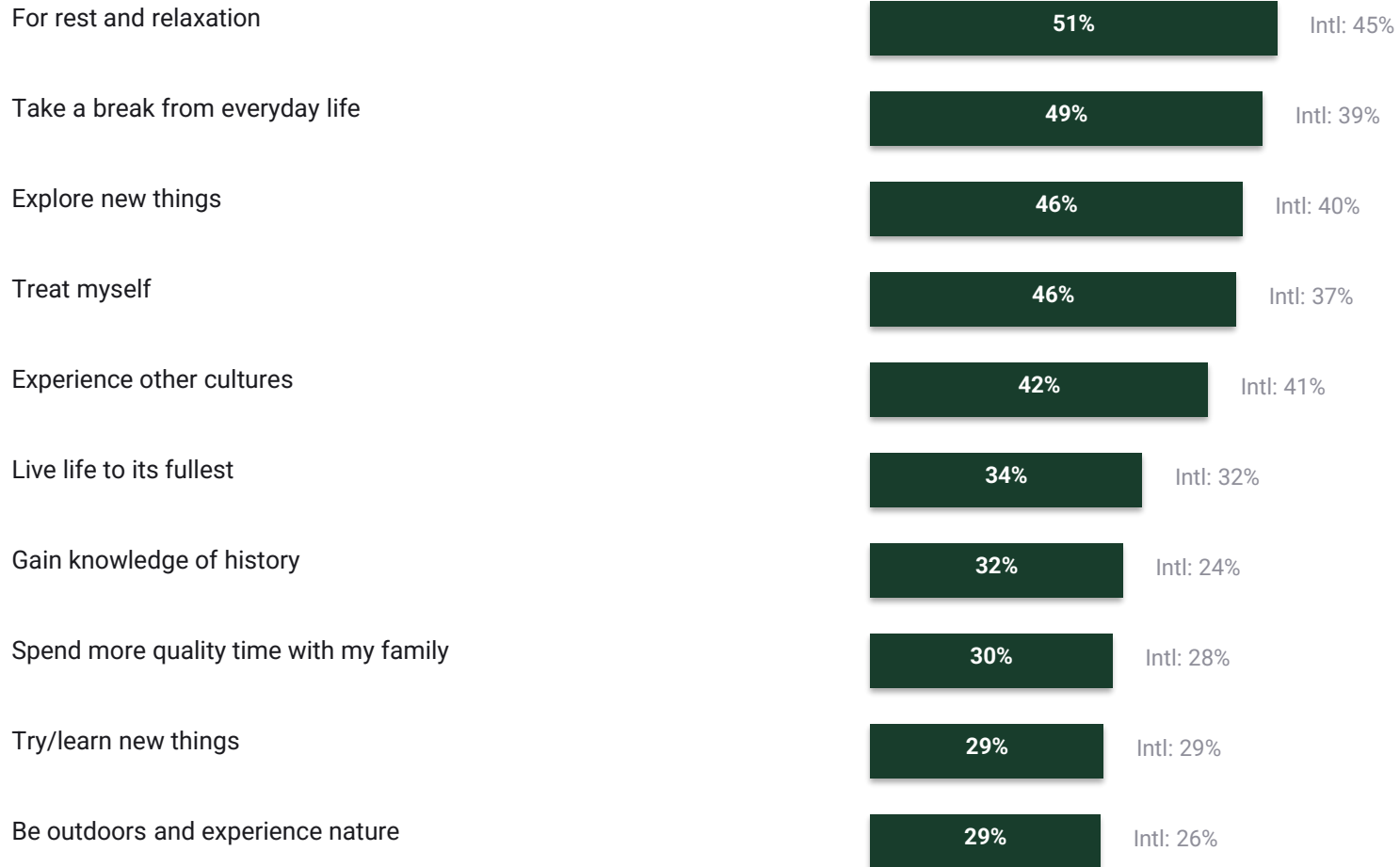


Barriers



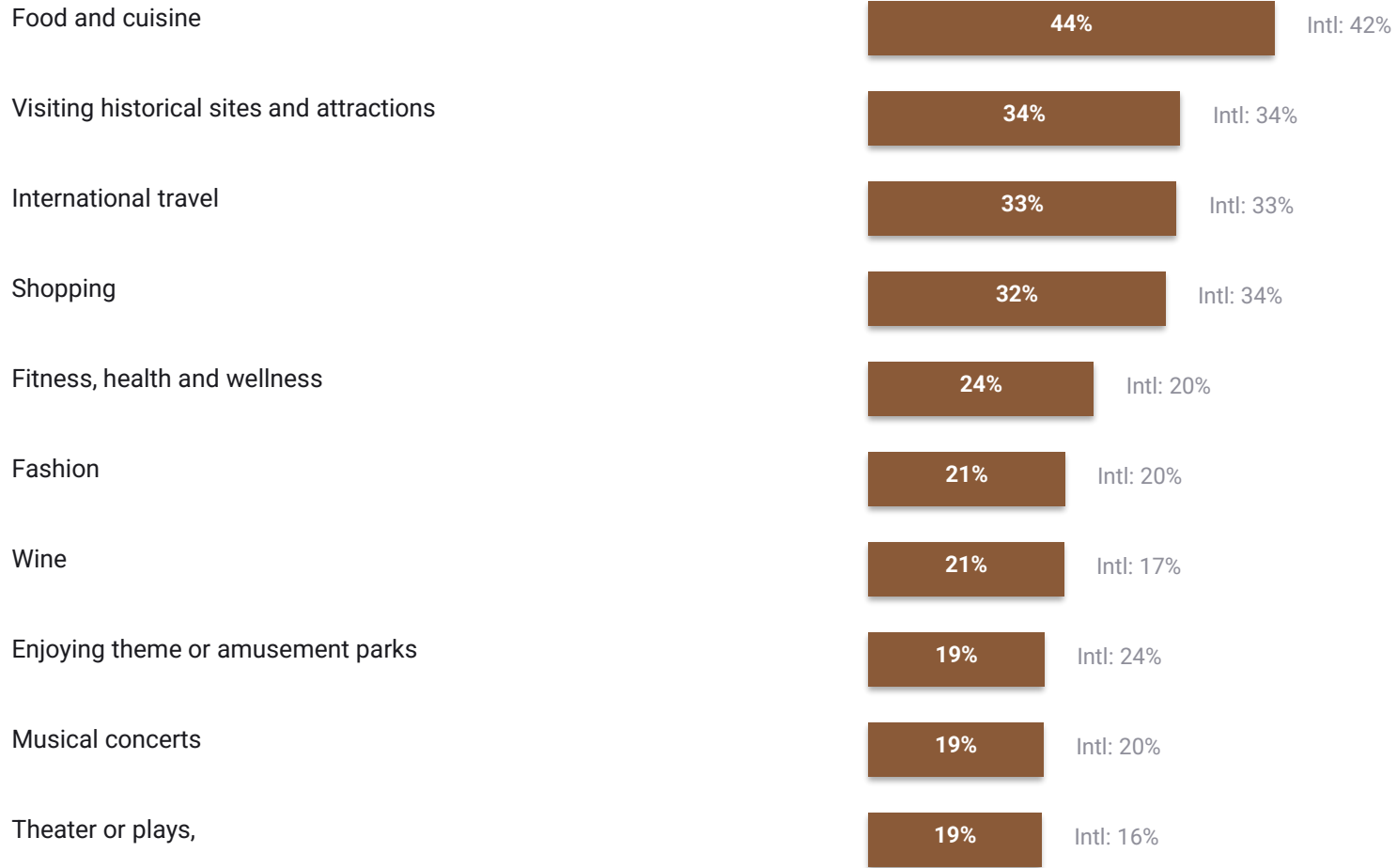
Travel Motivations

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

INDIA

Source Market Analysis | West Virginia

#4 by Spending | #3 by Visits

WEST
VIRGINIA®

TravelSouth
All Y'all Are Welcome USA

India | Key Findings

- 1 2026 West Virginia projected spending:** \$5.5M (+7.8% YOY). Projected visitors: 1.8K (0% YOY). Ranks #4 by spending and #3 by visits among West 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 (10.2%) exceeds 2015-2019 (0%).
- 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

\$5.5M

2026 West Virginia Spending

+7.8% YOY vs. 2025

1.8K

2026 West Virginia Visitors

0% YOY vs. 2025

\$7.1B

2026 USA Spending

+5.7% YOY vs. 2025

3.3M

2026 USA Visitors

+2.3% YOY vs. 2025

\$5.1M

2025 West Virginia Spending

-5.6% YOY vs. 2024

1.8K

2025 West Virginia Visitors

0% 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

0%

Spending

0%

Visits

2023-2027 PROJECTED CAGR

10.2%

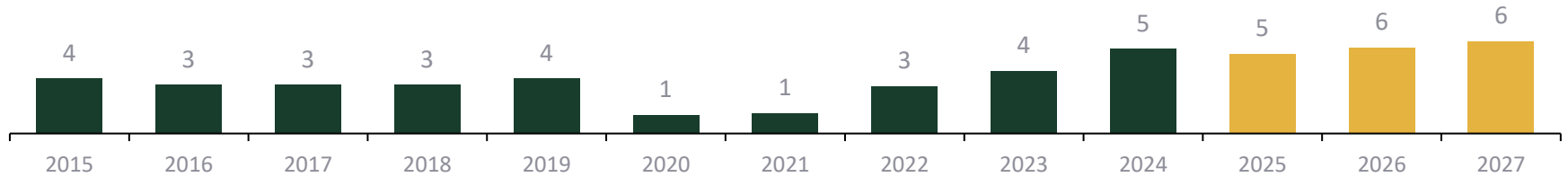
Spending

6.5%

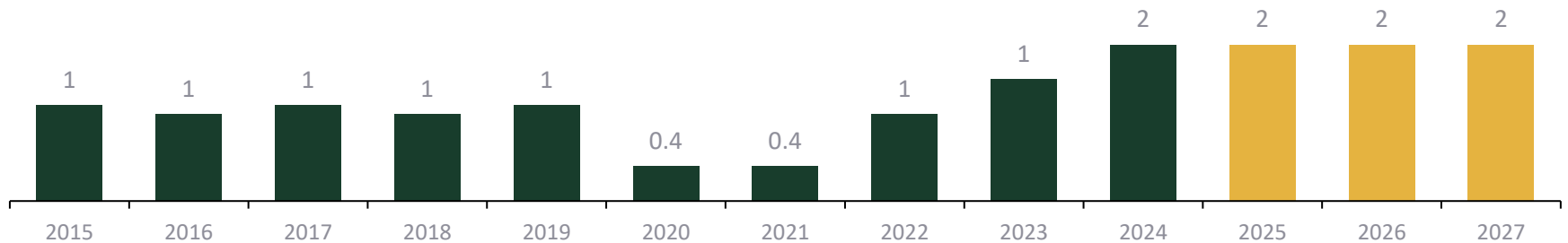
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



Historic Forecast

Visitor Perceptions | The American South

India

90%

Familiarity

Intl Markets: 67%

90%

Appeal

Intl Markets: 75%

62%

Promotional Buzz

Intl Markets: 29%

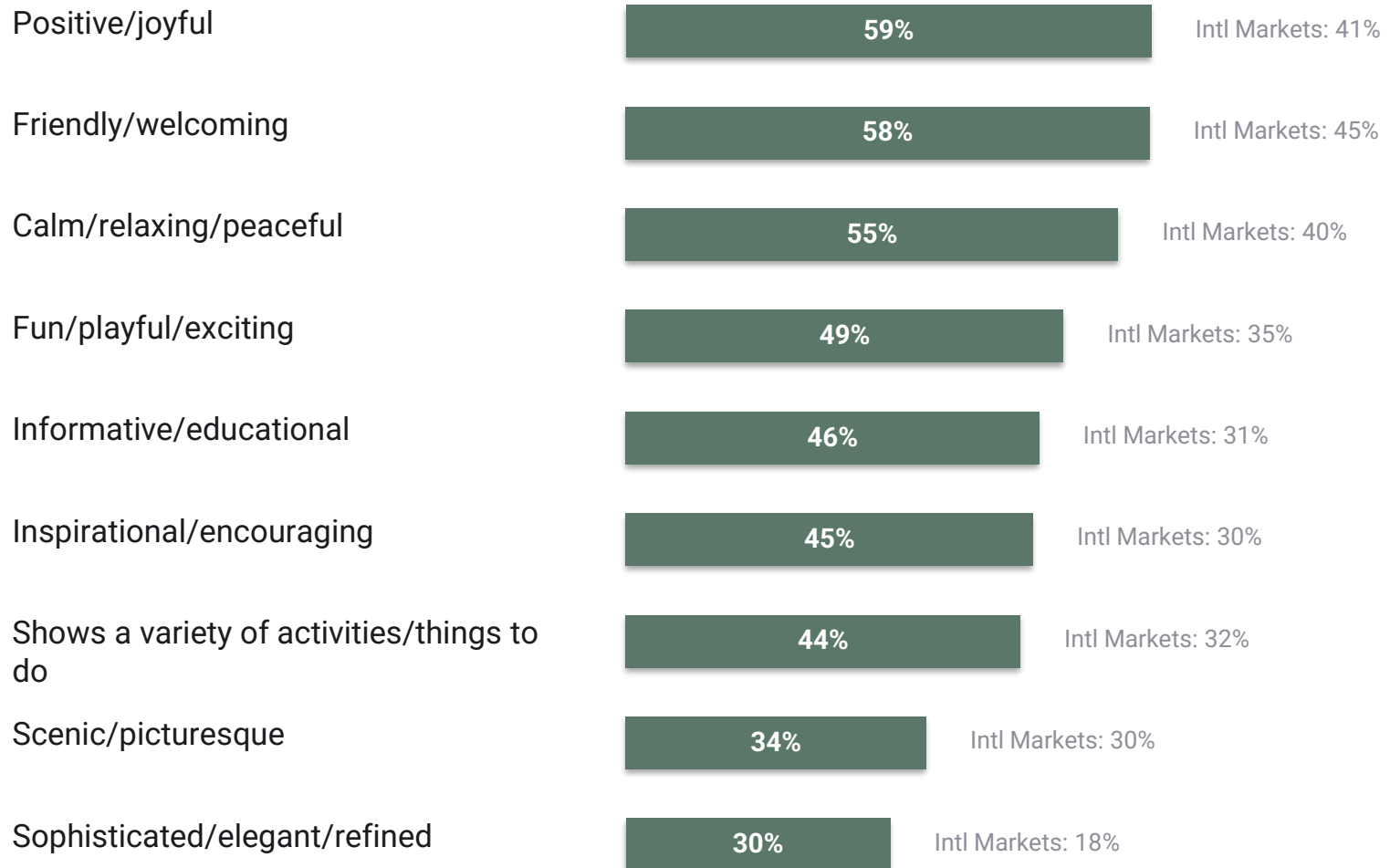
74%

Likely to Visit (5yr)

Intl Markets: 41%

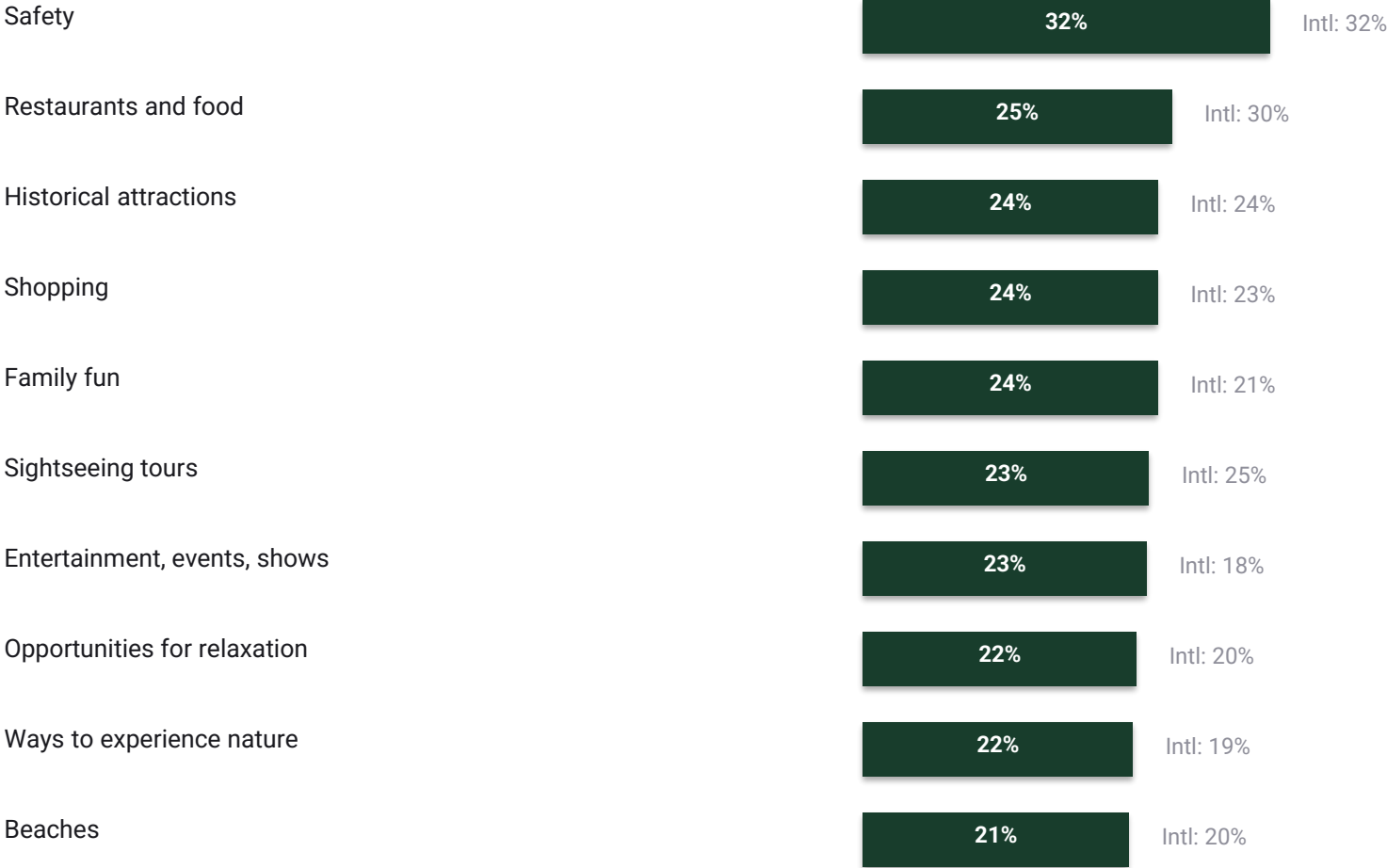
Desired Travel Promotion Tone

India



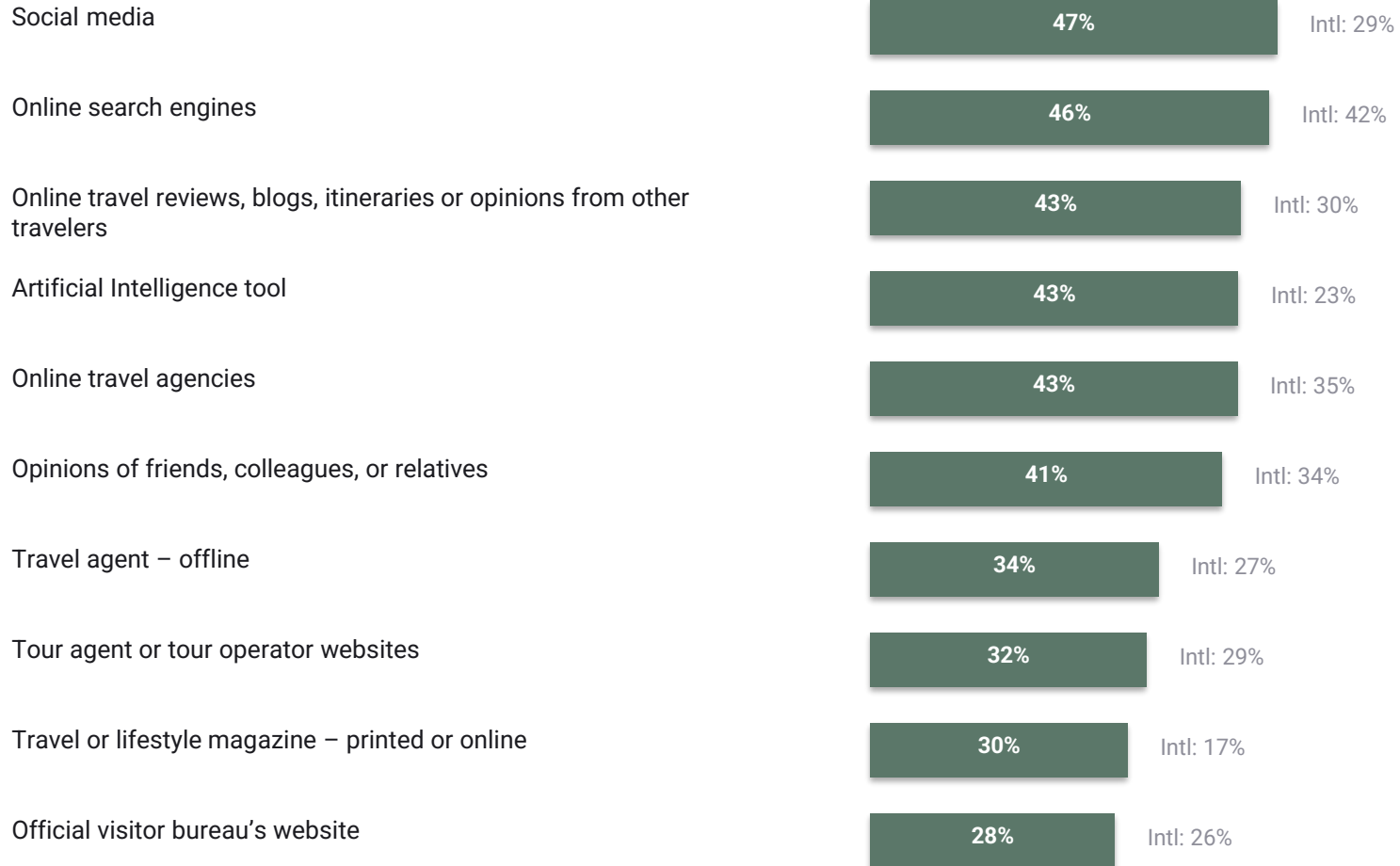
Top Information Sources

India



Planning Resources

India



U.S. Travel Planning & Budget

India

U.S. Trip Planning

66%

Likely to Visit US (2yr)

Intl Markets: 36%

11 wks

Planning Window

Intl Markets: 14 wks

10 wks

Booking Window

Intl Markets: 12 wks

U.S. Trip Profile

15.4

Avg Days in the U.S.

Intl Markets: 12.3

7.7

Avg Destinations in the U.S.

Intl Markets: 4.4

5.7

Avg Number of People Traveling with

Intl Markets: 2.6

Average Budget | 2-Week U.S. Trip

\$1,727

Hotels

Intl: \$1,568

\$1,581

Shopping

Intl: \$1,001

\$971

Dining

Intl: \$826

\$1,021

Sightseeing

Intl: \$881

\$1,317

Transport

Intl: \$772

\$6,617

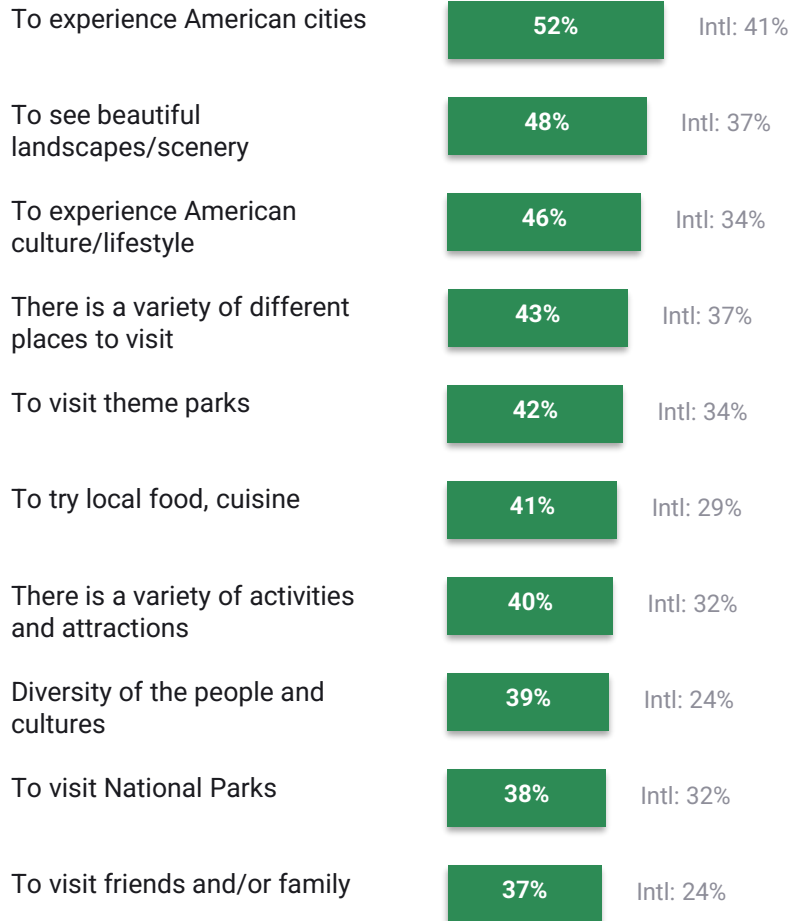
Total

Intl: \$5,049

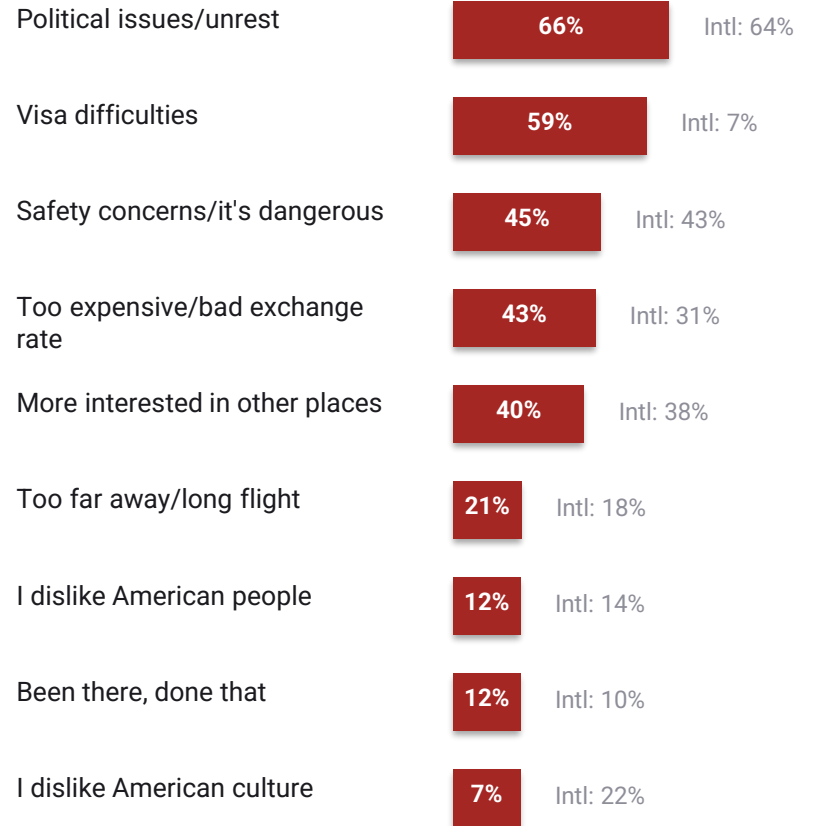
Enablers & Barriers to Visiting

India

Enablers

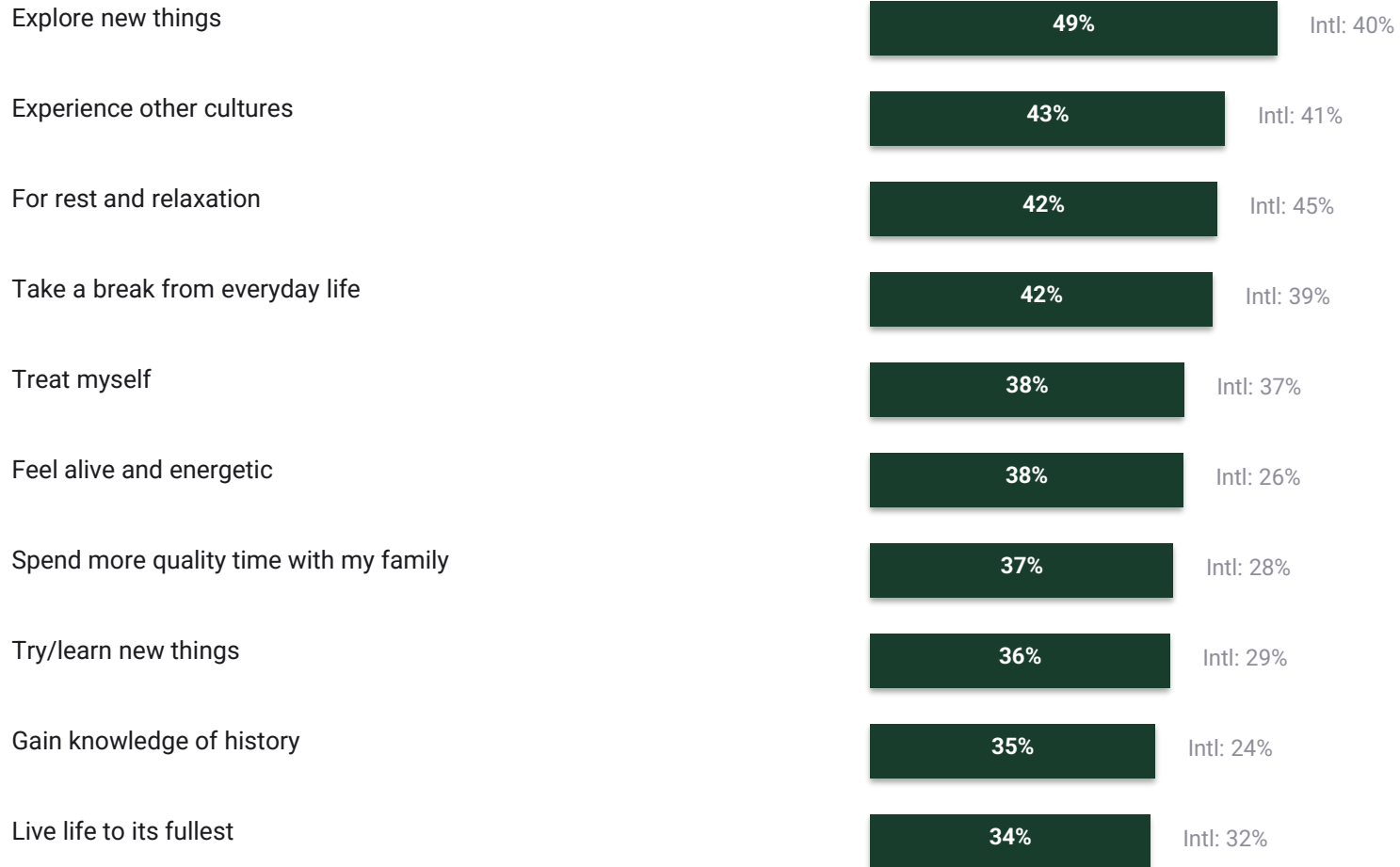


Barriers



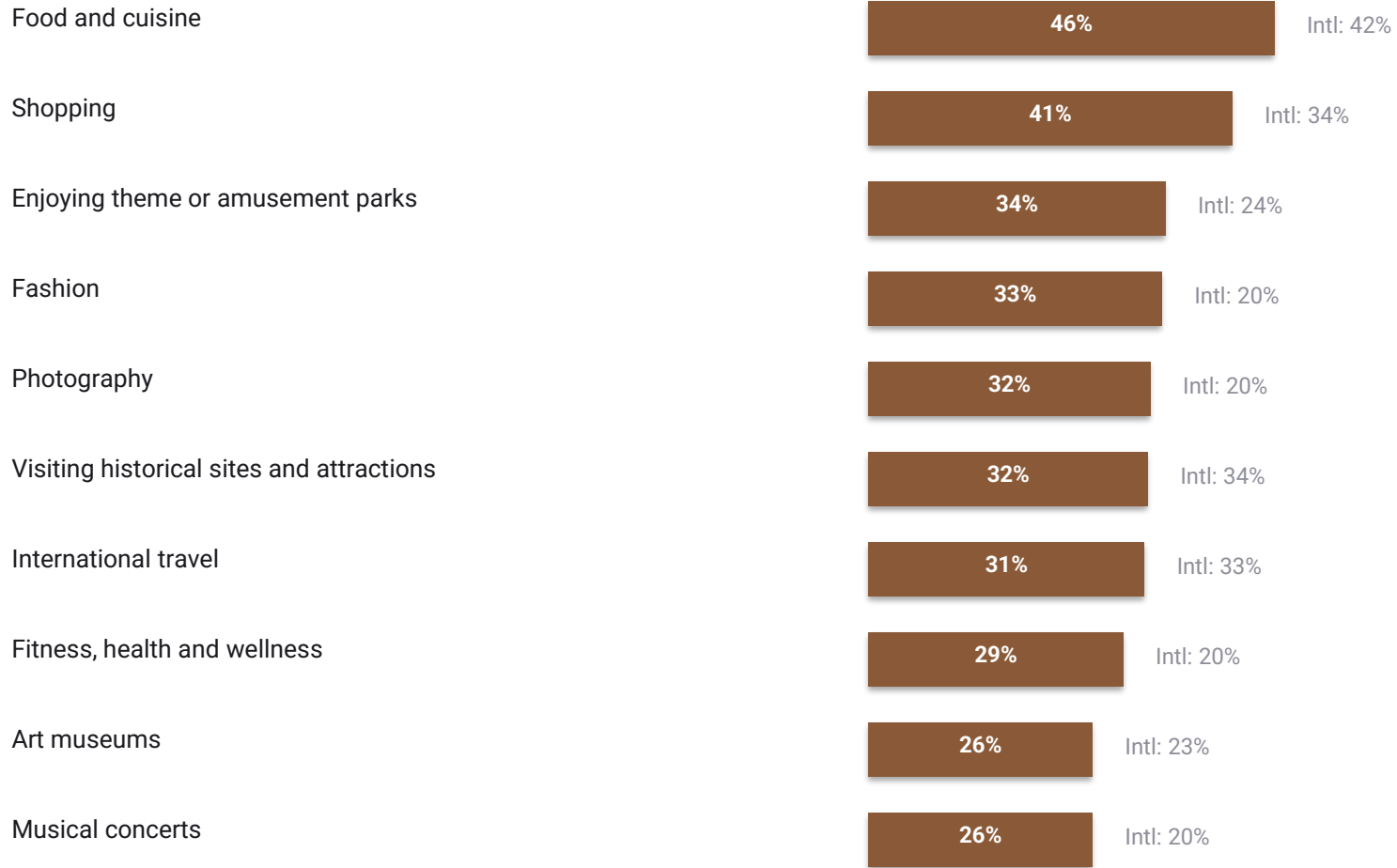
Travel Motivations

India



Hobbies & Passions

India



Travel Trends & Outlook

India

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

68%

Intl: 43%

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

67%

Intl: 42%

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

66%

Intl: 44%

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

64%

Intl: 54%

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

64%

Intl: 39%

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

61%

Intl: 53%

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

60%

Intl: 42%

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

54%

Intl: 34%

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

53%

Intl: 27%

India

Intl Markets

GERMANY

Source Market Analysis | West Virginia

#5 by Spending | #6 by Visits

WEST
VIRGINIA[®]

TravelSouth
All Y'all Are Welcome USA

Germany | Key Findings

- 1 2026 West Virginia projected spending:** \$3.5M (+9.4% YOY). Projected visitors: 1.2K (0% YOY). Ranks #5 by spending and #6 by visits among West 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 (10%) exceeds 2015-2019 (-9.1%).
- 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

\$3.5M

2026 West Virginia Spending

+9.4% YOY vs. 2025

1.2K

2026 West Virginia Visitors

0% YOY vs. 2025

\$6.3B

2026 USA Spending

+7.7% YOY vs. 2025

2.8M

2026 USA Visitors

+3.8% YOY vs. 2025

\$3.2M

2025 West Virginia Spending

+6.7% YOY vs. 2024

1.2K

2025 West Virginia Visitors

-7.7% YOY vs. 2024

\$5.8B

2025 USA Spending

+1.3% YOY vs. 2024

2.7M

2025 USA Visitors

-11.4% YOY vs. 2024

Growth Trajectory

2015-2019 CAGR

-9.1%

Spending

0%

Visits

2023-2027 PROJECTED CAGR

10%

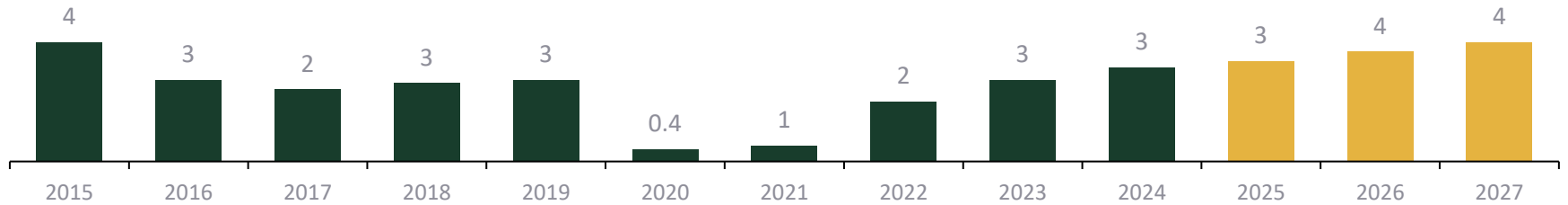
Spending

2%

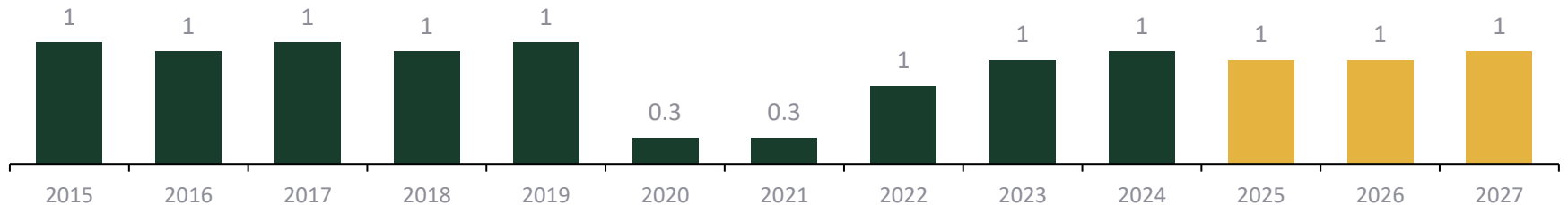
Visits

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%

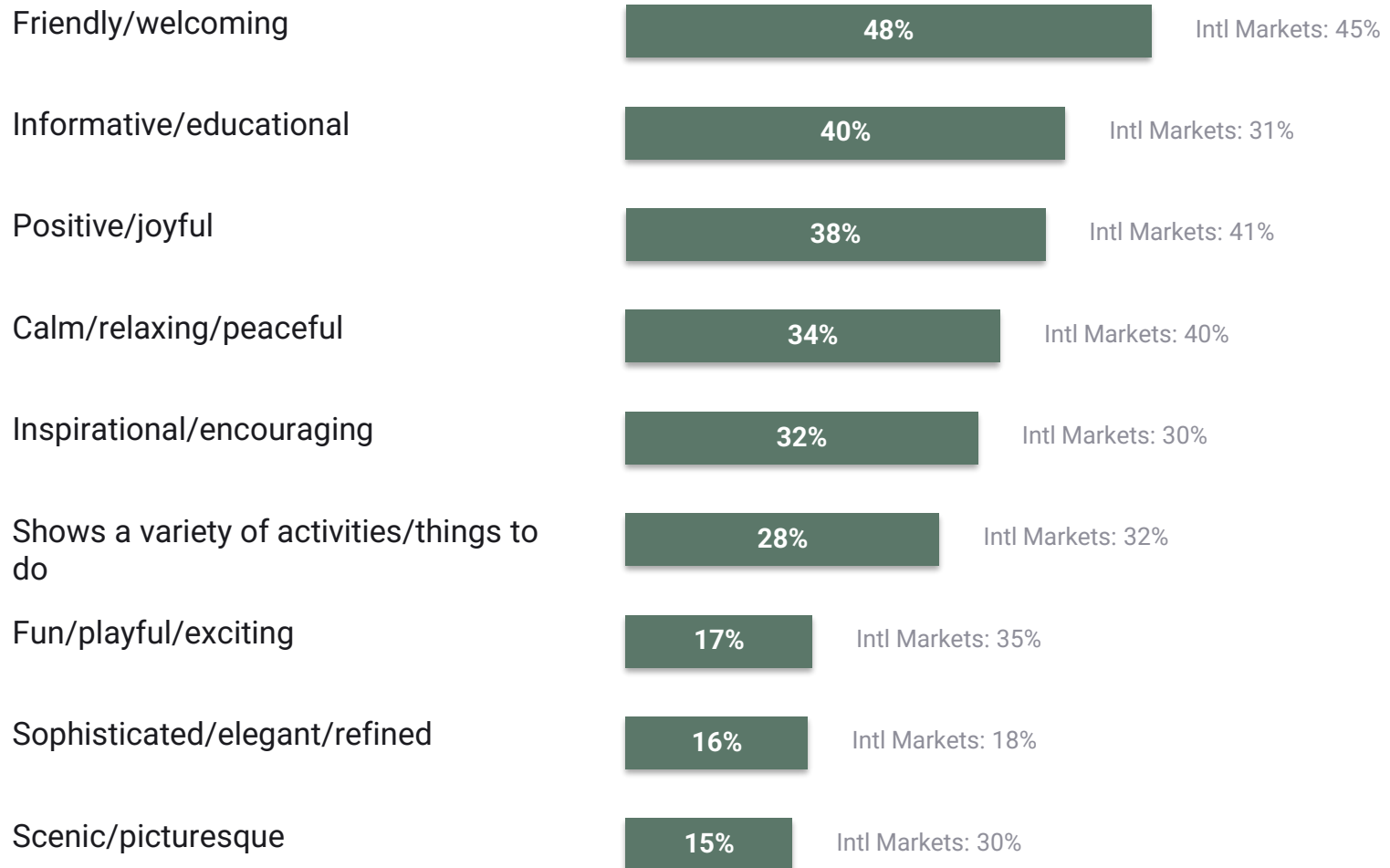
36%

Likely to Visit (5yr)

Intl Markets: 41%

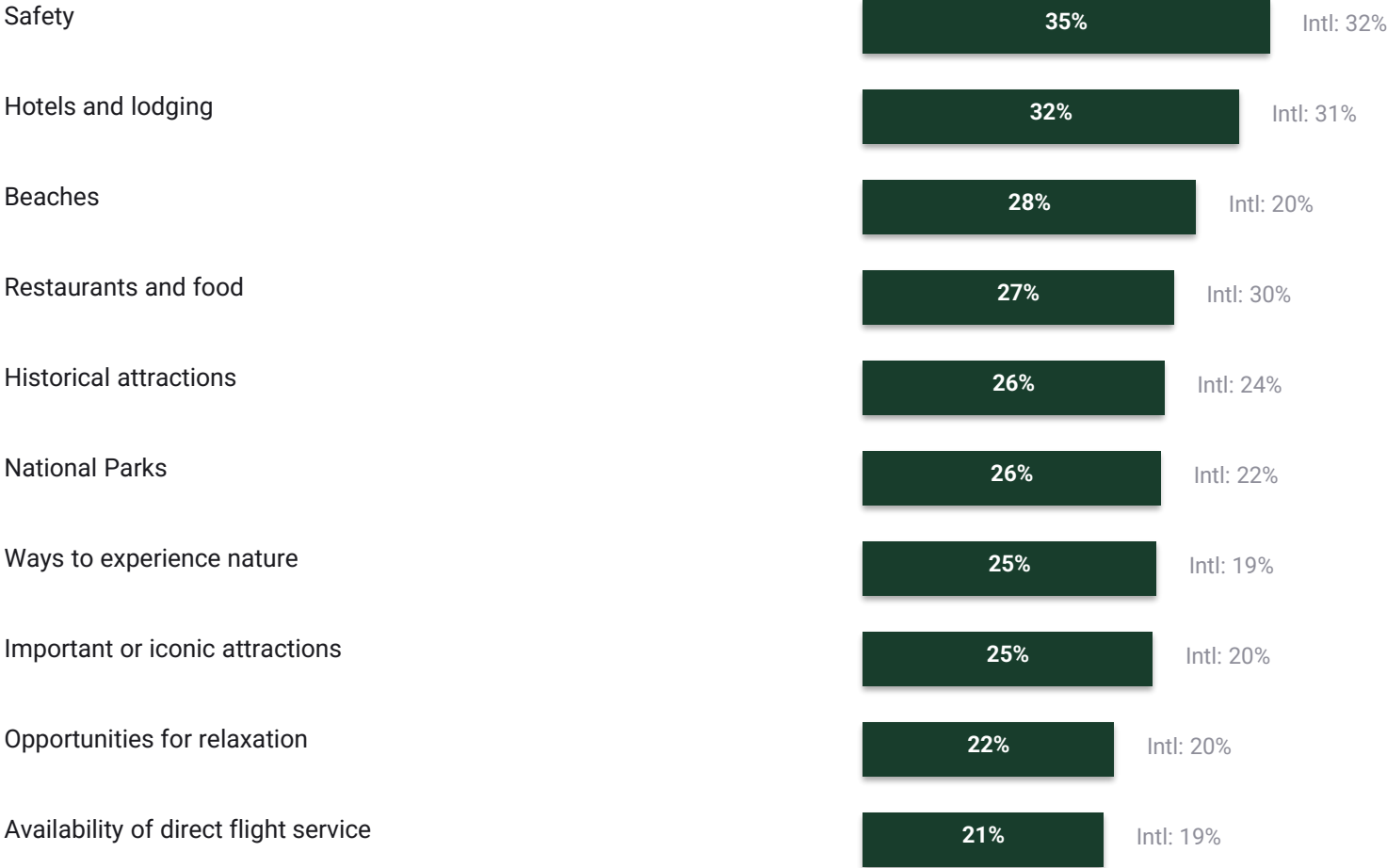
Desired Travel Promotion Tone

Germany



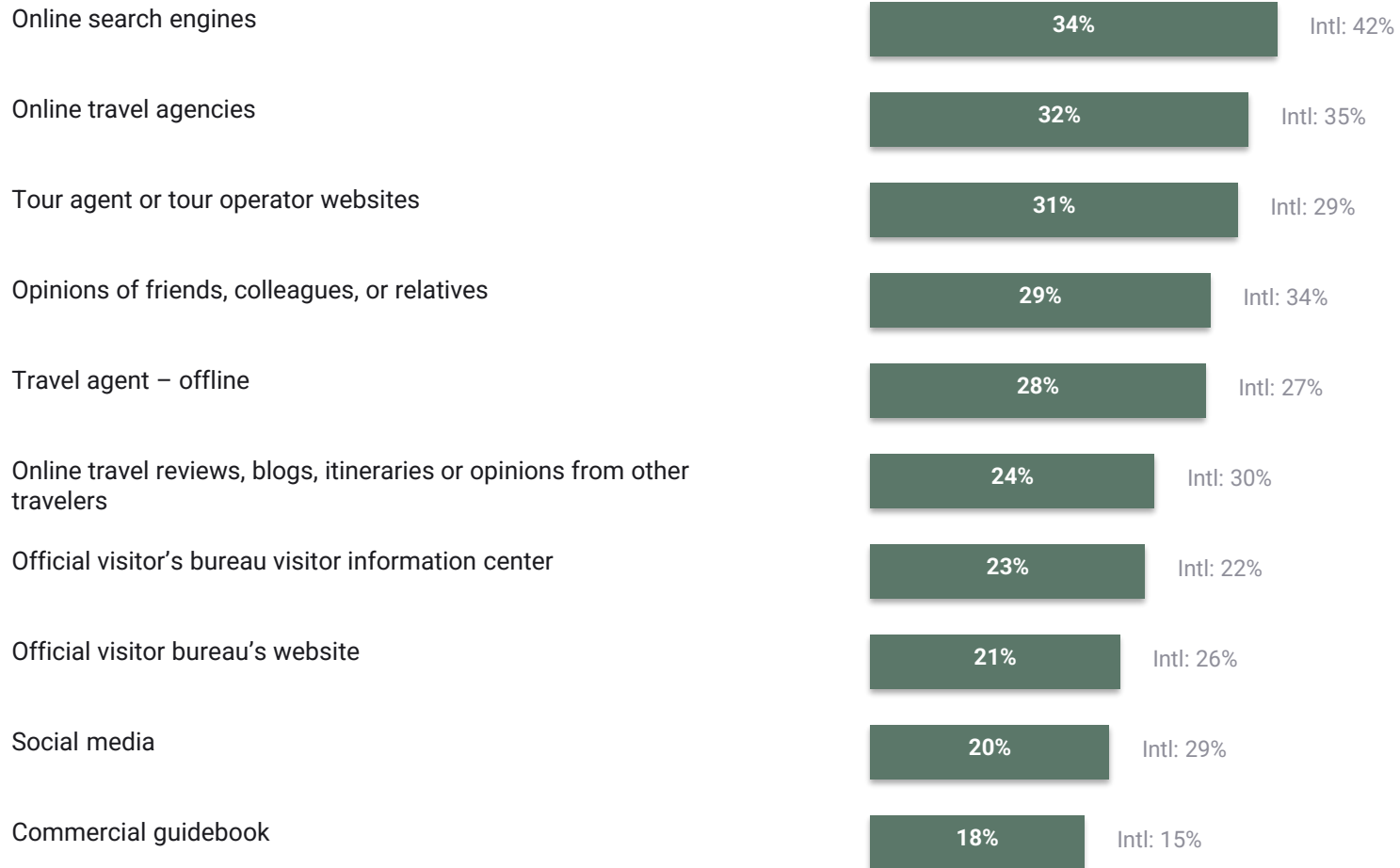
Top Information Sources

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

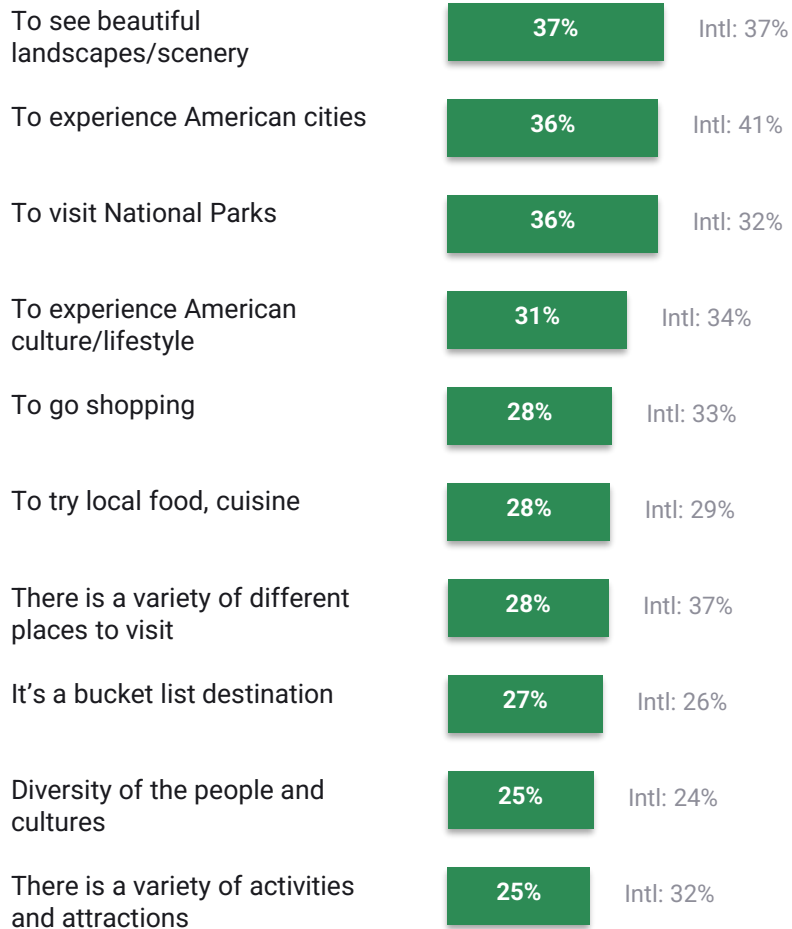
Total

Intl: \$5,049

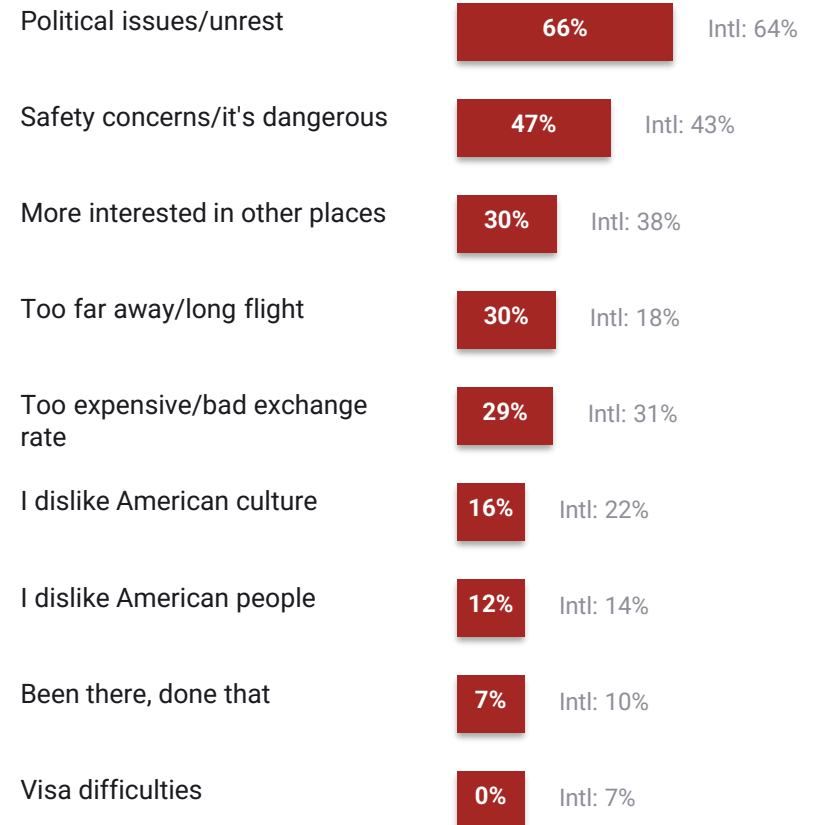
Enablers & Barriers to Visiting

Germany

Enablers

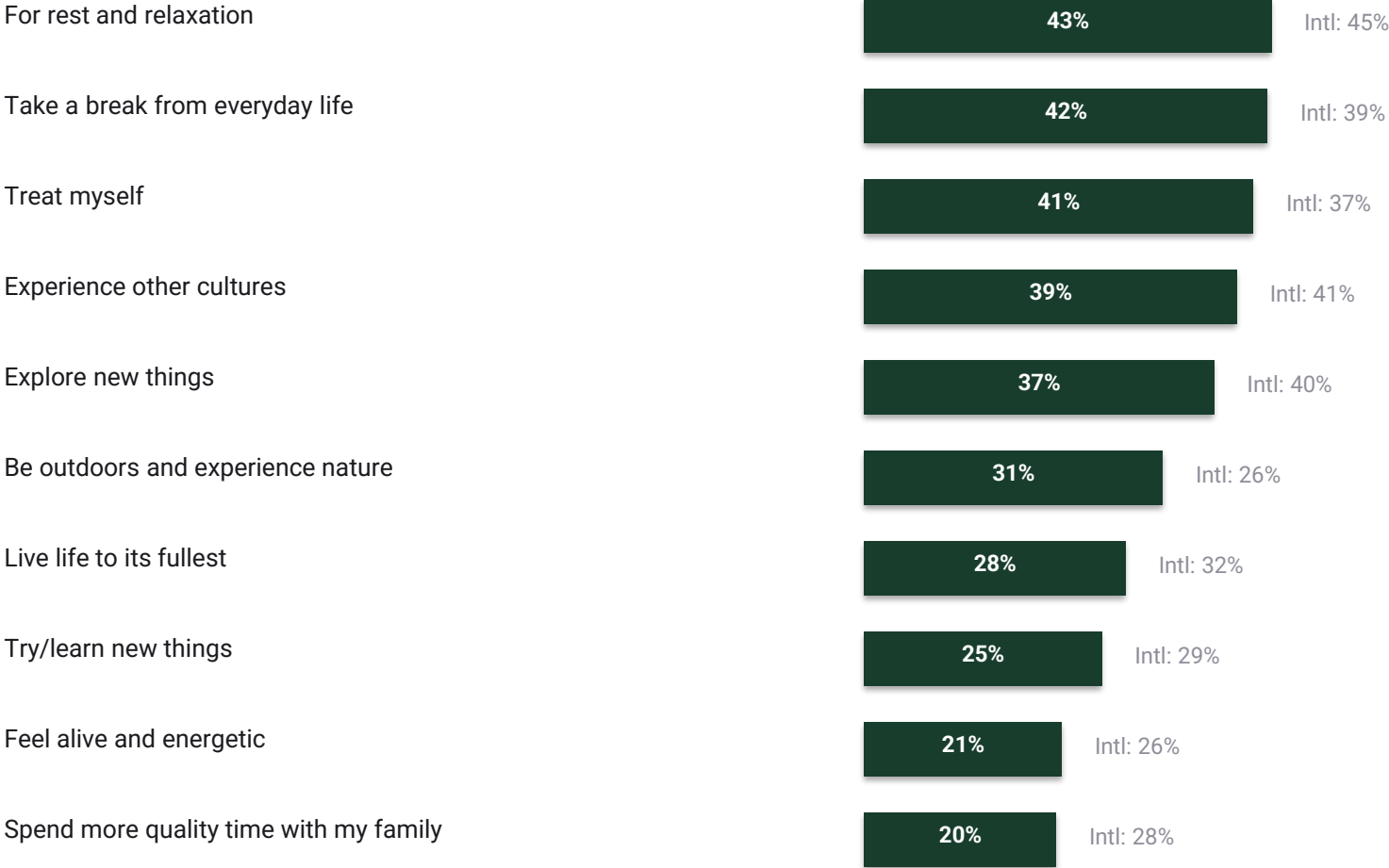


Barriers



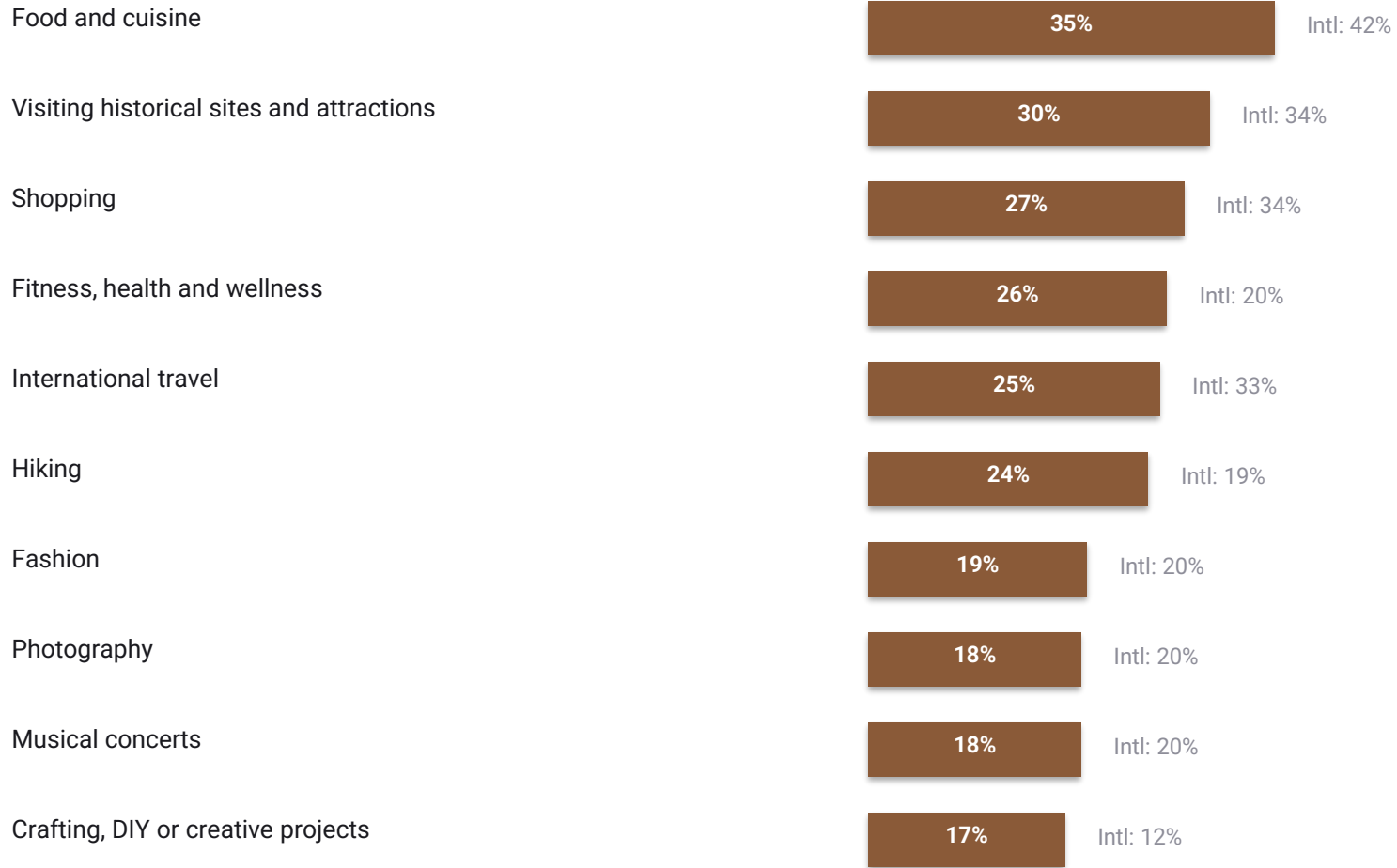
Travel Motivations

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

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

