



TRAVEL
SOUTH
USA

THE INTERNATIONAL
GATEWAY TO THE
SOUTHERN USA

Program of Work
DACH Region

Growth Trajectory

2015–2019 CAGR

3.2%

Spending

2.3%

Visits

2023–2027 PROJECTED CAGR

5.8%

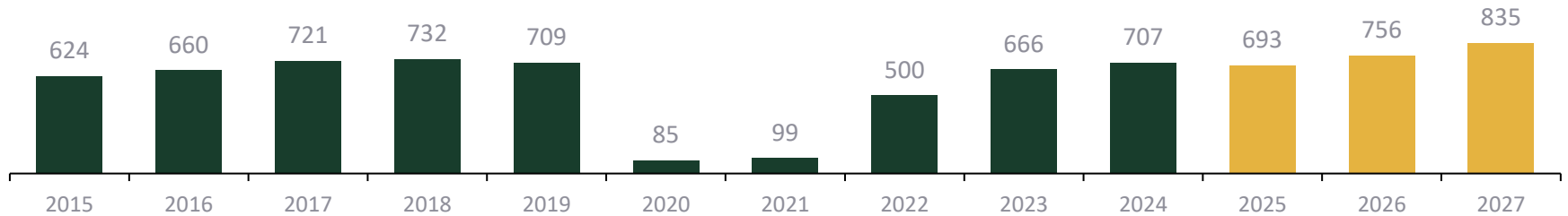
Spending

1.8%

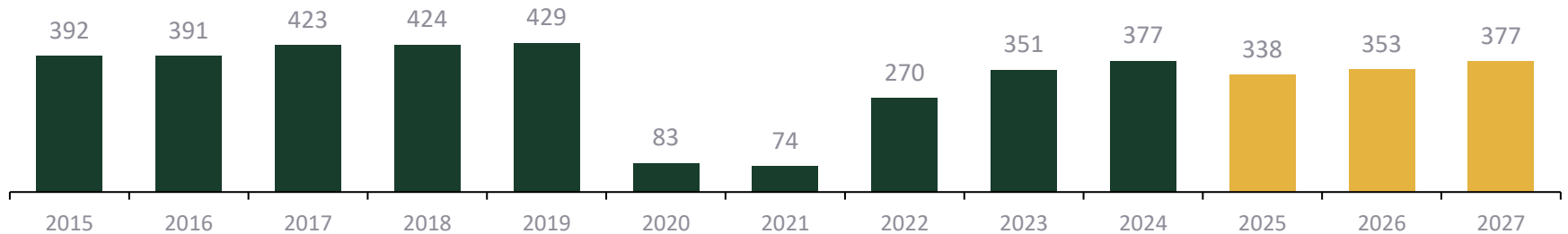
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

DACH Region

\$756.1M

2026 TSUSA Spending

+9.1% YOY vs. 2025

352.5K

2026 TSUSA Visitors

+4.4% YOY vs. 2025

\$8.4B

2026 USA Spending

+7.4% YOY vs. 2025

3.8M

2026 USA Visitors

+3.9% YOY vs. 2025

\$693.1M

2025 TSUSA Spending

-2% YOY vs. 2024

337.6K

2025 TSUSA Visitors

-10.4% YOY vs. 2024

\$7.8B

2025 USA Spending

-3.7% YOY vs. 2024

3.7M

2025 USA Visitors

-11% YOY vs. 2024

Where are we?

The German-speaking markets remain among the most important and high-value source markets for U.S. travel. Following a strong post-pandemic recovery, demand for travel to the United States has stabilized at a high level, with continued long-term growth potential. The U.S. consistently ranks among the most desired long-haul destinations, supported by strong air connectivity, a well-established distribution network, and a loyal base of repeat visitors.

Germany, as the second-largest European source market for U.S. inbound travel with about 1.8 million visitors, plays a leading role within the region. German travelers are known for their structured approach to travel planning and their preference for well-curated, in-depth itineraries. Booking behavior has normalized in recent years, with longer lead times and a renewed reliance on tour operators and travel agencies. At the same time, travelers are increasingly value-conscious, balancing rising travel costs with a desire for meaningful and immersive experiences.

Perception and sentiment toward U.S. travel are shaped in part by global developments and media narratives, which can influence views on accessibility and ease of travel. Nevertheless, interest in the destination itself remains consistently strong. Key motivators include iconic landscapes, vibrant cities, cultural diversity, and authentic local experiences. Destinations that combine storytelling, regional identity, and a strong sense of place—such as those represented by Travel South—resonate particularly well with German travelers.

Strategic Plan for FY 2026-27

For FY2026-27, the strategy will focus on expanding distribution, strengthening destination awareness and engaging India’s growing repeat U.S. traveler market through trade, media and digital outreach.

TRAVEL TRADE OUTREACH

Strengthen distribution and conversion by giving DACH trade partners the knowledge and tools to sell longer, multi-state Southern journeys.

Key activity:

- Product research and development
- Operator meetings and sales missions
- Agent training and webinars
- Trade newsletters
- International Showcase recruitment
- Industry events and buyer outreach

PR & MEDIA OUTREACH

Build awareness through sustained earned media outreach focused on authentic Southern experiences and strong destination storytelling.

Key activity:

- One-to-one media meetings
- Proactive story pitching
- Journalist relationship building
- Hosted media support
- Priority themes: food, music, culture, road trips and outdoors
- Trade and consumer media outreach

SOCIAL & CREATOR

Extend Travel South USA storytelling across digital and social channels through engaging content and strategic creator partnerships.

Key activity:

- Social and digital storytelling
- Short-form and visual content
- Creator and influencer partnerships
- Road trip, culinary, music and outdoor themes
- Partner amplification and consumer campaigns

DACH Market Overview

KPI's & GOALS

Project	KPI
TRADE	
Tour operator meetings	TBD
Agent Trainings	TBD
International Showcase & FAMs participants (10+2)	12
Travel South Travel Trade Newsletter	10
Open rate for Newsletters/leads generated	25%
Managed Media	
Media Meetings	TBD
No. of Articles Generated	TBD
Estimated Views (online articles)	TBD
Print Readership (Print articlesO	TBD
Global Media Marketplace & FAMs	5
Travel South USA PR Newsletters	10x
Open rate for Newsletters/leads generated	25%
Social Posts - Owned Channels	
Meta - FB /IS (8+ per month)	96+
Consumer Campaigns	
America Unlimited , CANUSA , CRd, Fairflight, Go2Travel, Knecht Reisen	
Partner Engagement	
Alabama Highlighted Activation	1
Georgia Highlighted Activation	1
Kentucky Highlighted Activation	1
Louisiana Highlighted Activation	1
Mississippi Highlighted Activation	1
Missouri Highlighted Activation	1
North Carolina Highlighted Activation	1
South Carolina Highlighted Activation	1
Tennessee Highlighted Activation	1
ROTS Highlighted Activation	1

DACH - 2026

Category	Date	Description	Location
Consumer	September 4-6, 2026	B2B & B2C Consumer Fairs (Knecht Resien)	Widnisch/Zurich/Lucerne, Switzerland
Consumer	October 29-Nov 1, 2026	Reisen & Caravan 37,000 Consumers (Fairflight Touristik)	Erfurt, Germany
Consumer	November 5-7, 2026	B2B & B2C Consumer Fairs (Go2Travel in partnership with Dreamline Travel)	Baden, Switzerland
Consumer	November 18-22, 2026	TC Touristik & Caravaning 57,000 Consumers (Fairflight Touristik)	Leipzig, Germany
Trade	Nov 29-Dec 3, 2026 + Dec 3 - 6, 2026	Travel South International Showcase	Nashville, TN + FAMS

DACH - 2027

Category	Date	Description	Location
Consumer	January 16-24, 2027	CMT Stuttgart 300,000 Consumers	Stuttgart, Germany
Trade / Media	January 16-24, 2027	German Sales Mission	Germany
Consumer	January 29-31, 2027	Reisemesse 32,000 Consumers (Fairflight Touristik)	Dresden, Germany
Trade	January/February 2027	America Unlimited/American South Road Show	3 cities in Germany
Consumer	February 10-14, 2027	F.R.E.E. Munich 120,000 Consumers (Fairflight Touristik)	Munich, Germany
Consumer	February 14-17, 2027	Ferienmesse 86,000 Consumers (Fairflight Touristik)	Viena , Austria
Media	April 26-29, 2027	Travel South Media Marketplace	Bentonville, AR + Press Trips
Trade	May 2-6, 2027	IPW	New Orleans, LA