



International Visitor Forecast

National Travel and Tourism Office

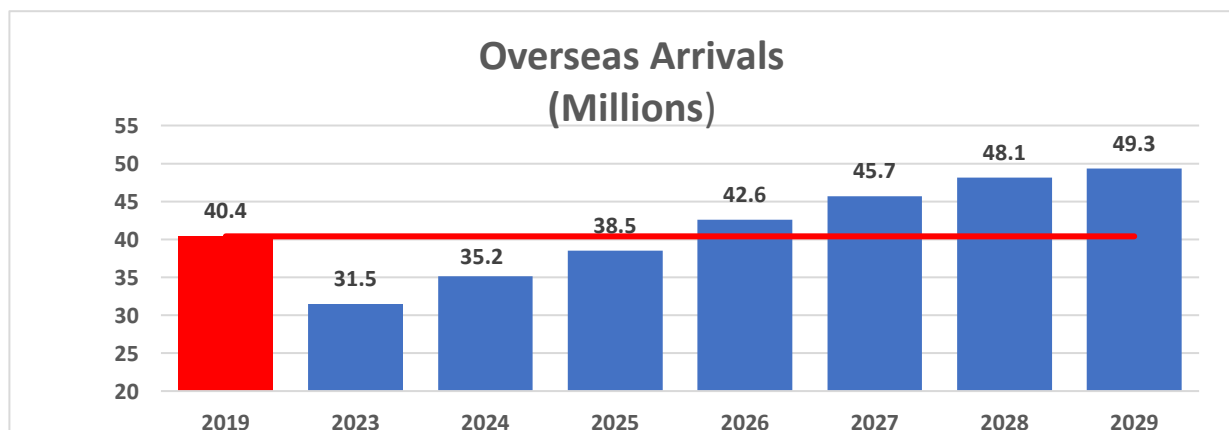
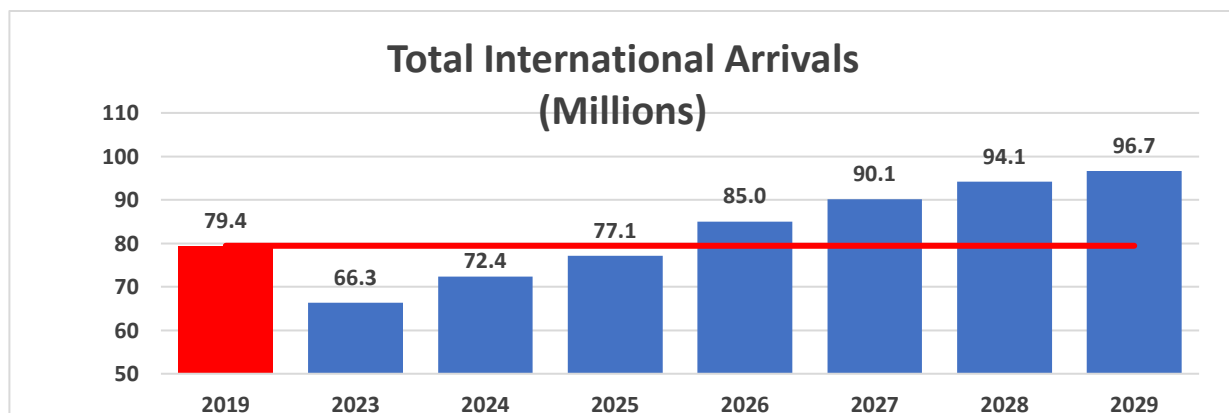
(March 2025)

The National Travel and Tourism Office's (NTTO) International Visitor Forecast estimates total international arrivals to the United States for years 2025-2029 from the top 12 U.S. source markets, as well as overseas (which excludes Canada and Mexico) and total international visitation from all countries. NTTO is part of the Industry and Analysis business unit of the U.S. Department of Commerce's International Trade Administration.

Background: Except for Canada, international visitors from top U.S. international inbound markets continued to increase robustly in 2024. Total international visitation rose 9.1% from 2023 to 72.4 million arrivals in 2024. Of this total, overseas arrivals to the United States increased 11.7% to 35.2 million (excluding Canada and Mexico). Visitors from Mexico increased 17.4%, while Canadian visitors declined 1.3% in 2024.

Compared to visitation in 2020 (the initial pandemic year), total international visitors increased 277% and overseas arrivals were up 363% in 2024. As of 2024, total international visitation to the United States has rebounded to 91% of the pre-pandemic 2019 level, while total overseas visitation has achieved 87% of its pre-pandemic level.

Forecast: Total international arrivals will continue to increase solidly over the next three years and will surpass pre-pandemic 2019 visitation in 2026. According to the forecast, total international arrivals will increase 6.5% to 77.1 million in 2025, rise 10.2% to 85 million in 2026, and grow 6% to 90.1 million in 2027.



Source: NTTO



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Top 12 U.S. Inbound Markets: Top Line Observations

The top U.S. inbound markets covered in the forecast include Canada, Mexico, France, Germany, Italy, the United Kingdom, China, India, Japan, South Korea, Australia, and Brazil. Visitation to the United States from these countries accounted for 78% of total U.S. international inbound arrivals in 2024.

Visitation to the United States continued to increase from most of the top countries in 2024.

- After the previous two years' strong recovery from the pandemic, arrivals from most of top European countries embarked on a steady growth track in 2024. From 2020 to 2024, Italian visitors to the United States escalated nearly 700%, the largest growth rate among all top U.S. international inbound travel markets included in this report. Consequently, arrivals from Italy surpassed the pre-pandemic level in 2024.
- For India, one of the fastest growing countries since the pandemic, arrivals to the United States already exceeded the pre-pandemic level by almost 50% in 2024. Although visitation from all Asian countries included in the forecast increased significantly in 2024, China and Japan were still roughly halfway back to their pre-pandemic levels. At the same time, arrivals from South Korea reached three quarters of its 2019 level.
- After the previous two years' significant increase, visitation from Australia had a relatively moderate rise in 2024. As of 2024, 78% of the pre-pandemic level was recovered by Australia.
- As an exception, Canadian arrivals declined 1.3% in 2024, mainly due to increasing in travel costs and weak economic growth.

Forecast for 2025-2029: Arrivals from all top countries will continue to increase in 2025. While two of the top U.S. inbound travel markets have already surpassed their pre-pandemic levels in 2024, five countries will reach or exceed their pre-pandemic levels in 2025 according to the forecast.

Group 1: Countries that surpassed pre-pandemic levels in 2024 (India and Italy):

- Helped by a strong economy, visitation from India has increased 552% since 2020 to 2.2 million in 2024 and India has become the fourth largest U.S. inbound travel market. This strong growth will continue over the next few years. India visitation is expected to be more than double that of the 2019 level by 2029.
- As a result of significant increases over the past three years, visitation from Italy surpassed its pre-pandemic level in 2024. The strong growth will continue in 2025 and 2026, with an increase of 7.5% and 8.8%, respectively.

Group 2: Countries that will surpass pre-pandemic levels in 2026 (Germany, France, Canada, Brazil, and Mexico):

- Following a slight decrease in 2024, arrivals from Canada are expected to increase 2.6% in 2025.
- A strong growth (9.3%) will likely be seen in visitation from Brazil in 2025.
- Visitations from these five countries are predicted to surpass pre-pandemic levels in 2026.
- Arrivals from Mexico have significantly increased since 2021 and achieved 93% of pre-pandemic numbers in 2024. In 2025, visitation from Mexico is expected to continue to grow. The growth rate, however, is expected to be more moderate.



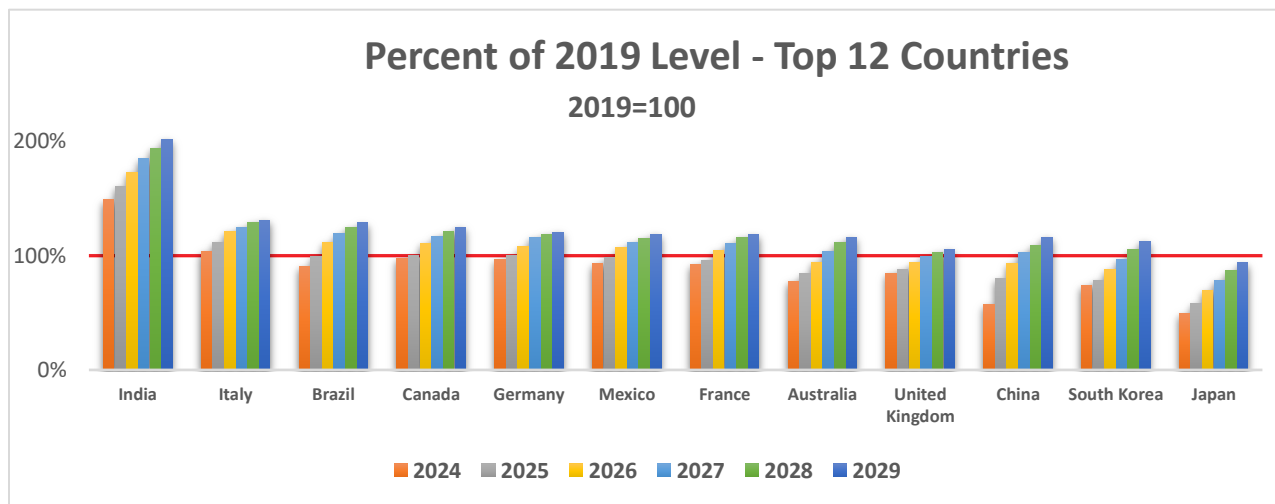
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Group 3: Countries that will be fully recovered in 2027 and later (Australia, China, South Korea, United Kingdom, and Japan)

- Visitation from Australia will continue to increase steadily over the next three years and is expected to approach its 2019 levels in 2027.
- Although the recovery from the pandemic was far behind that of other top U.S. international inbound markets through 2024, Chinese arrivals increased 51% in 2024, the highest growth rate among all top countries in the year. Visitation from China is likely to continue to surge in 2025 and 2026. Chinese arrivals are expected to surpass 2019 levels in 2027.
- Deeper declines in 2020 and 2021 and high travel costs resulted in more challenges to the path of recovery for Japan. Although significant increases were realized in the past three years, the number of Japanese visitors to the United States in 2024 was still much lower than in 2019. Visitation from Japan is expected to grow solidly in the next five years.



Source: NTTO

ⁱ This forecast is based on underlying travel and economic trends through the end of 2024.