

An aerial photograph of a coastal town, likely in New England, featuring colorful houses, a harbor with many boats, and a parking lot. The ocean is visible in the background.

BRAND
USA

THE STATE OF INTERNATIONAL TRAVEL

DISCOVER NEW ENGLAND SUMMIT 2026



AGENDA

- 01 GETTING TO KNOW BRAND USA
- 02 DIVE INTO THE DATA:
GLOBAL TRAVEL INSIGHTS
- 03 OUR MARKETING IN ACTION
- 04 PARTNER WITH US

An aerial photograph of a coastal resort. In the foreground, a large, multi-story stone building with a complex roofline sits on a rocky peninsula. To its right is a well-maintained golf course with distinct mowed stripes. The coastline is rugged with white-capped waves crashing against the rocks. In the background, a large body of water is filled with numerous sailboats, and a residential area with various houses is visible on a hillside.

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GETTING TO KNOW BRAND USA



Brand USA drives economic growth and community prosperity throughout the United States by attracting high-impact international travelers through strategic marketing and travel policy communications

U.S. TRAVEL & TOURISM

BRAND
USA

PROMOTION

U.S.
Travel &
Tourism

U.S. TRAVEL
ASSOCIATION®

ADVOCACY



POLICY

BRAND
USA

DIVE INTO THE DATA: GLOBAL TRAVEL INSIGHTS



INTERNATIONAL ARRIVAL DECLINE 6% IN 2025

68.3 million arrivals is 4.1 million below 2024



+6%

1.0 MILLION MORE
VISITORS FROM MEXICO



-21%

4.2 MILLION FEWER
VISITORS FROM CANADA



-2%

870K FEWER
OVERSEAS VISITORS



2025 INTERNATIONAL ARRIVALS – TOP 10

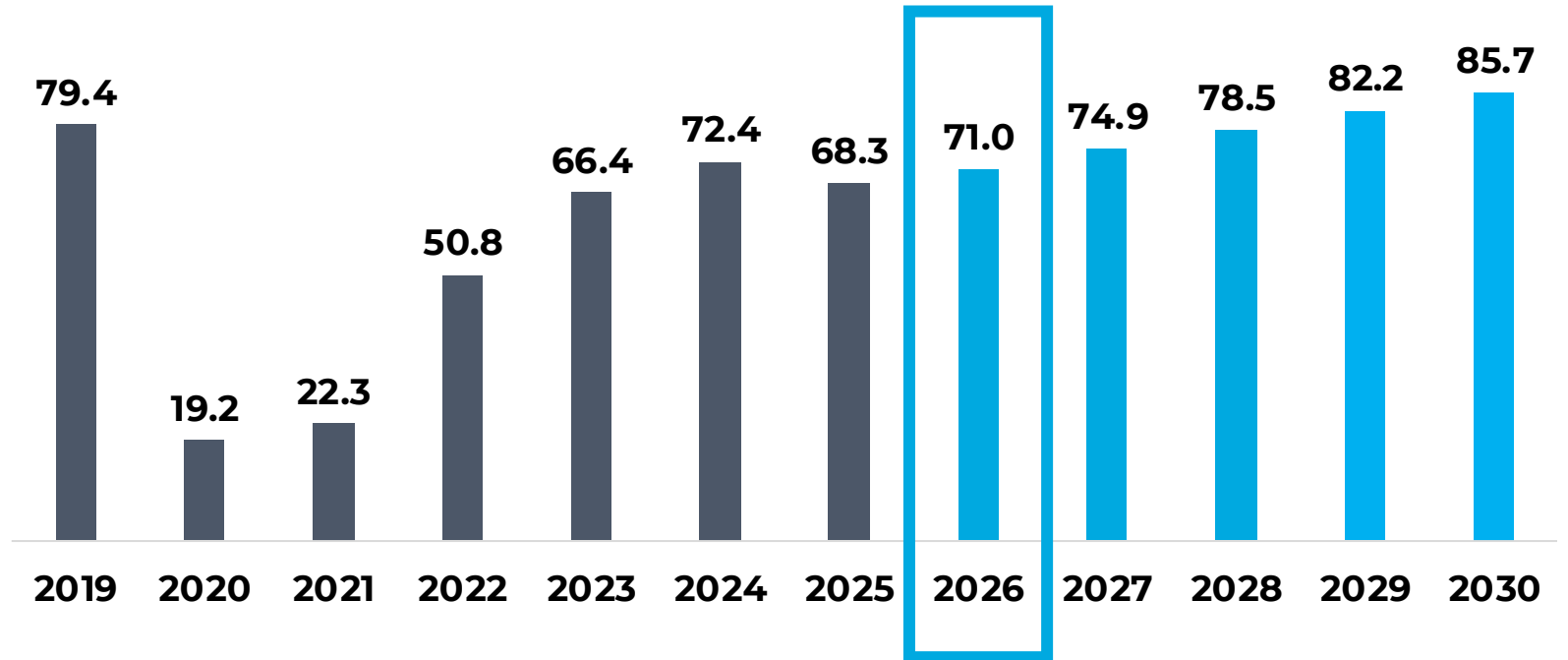
The top 10 markets account for 74% of international arrivals, with growth led by Mexico (+6%) and Japan (+7%), while significant declines from Canada (-21%) and several European markets contributed to a 6% overall decrease in arrivals.

	2025 Arrivals	Δ YOY
Mexico	17,980,030	+6%
Canada	16,018,525	-21%
United Kingdom	4,058,124	+1%
India	2,060,726	-6%
Japan	1,967,298	+7%
Brazil	1,916,565	+0%
Germany	1,770,112	-11%
South Korea	1,647,142	-3%
France	1,589,676	-7%
China	1,562,458	-4%
Total International	68,287,793	-6%

INTERNATIONAL VISITATION FORECAST

Visitation is forecast to rebound beginning in 2026, growing at an average annual rate of 5%.

Arrivals are expected to surpass 2024 levels by 2027 and fully recover to pre-pandemic levels by 2029.





INTERNATIONAL TRAVEL & TOURISM SPENDING (2025)

\$250B

TOTAL SPENDING FROM
INTERNATIONAL VISITORS
TO THE USA

\$686M

AVERAGE DAILY
SPENDING

\$3,600

AVERAGE SPEND PER
INTERNATIONAL VISITOR

A photograph of an airplane cabin interior, showing rows of seats and passengers from a rear perspective. The lighting is warm and the image is slightly blurred to create a sense of depth.

RECORD NON-STOP AIR CONNECTIVITY TO THE UNITED STATES

Nonstop international seat capacity exceeded pre-pandemic levels in 2024 and continued to expand through 2025 and into 2026, reflecting sustained airline commitment to U.S. routes.

259

ORIGIN AIRPORTS

105

ORIGIN COUNTRIES

68

UNITED STATES
DESTINATIONS

2026 NON-STOP SEAT CAPACITY TO THE USA

Looking ahead, 2026 capacity growth is mixed among the top 10 markets, with gains in several markets offset by modest pullbacks in others.

Non-Stop Seat Capacity		
Market	Jan – Dec 2026	Δ YOY
Mexico	24,693,639	-2%
Canada	18,378,306	-1%
United Kingdom	12,456,194	-3%
Germany	6,456,248	-2%
Dominican Republic	6,116,457	4%
Japan	5,753,999	-1%
France	5,599,709	2%
Italy	4,034,380	7%
South Korea	3,771,087	4%
Spain	3,699,215	18%
Top 10 Markets	90,959,234	0%
Total International	161,475,939	+1%



NEW ENGLAND NON-STOP CONNECTIVITY

International non-stop connectivity is slated to increase 9% in 2026

63

ORIGIN AIRPORTS

42

ORIGIN COUNTRIES

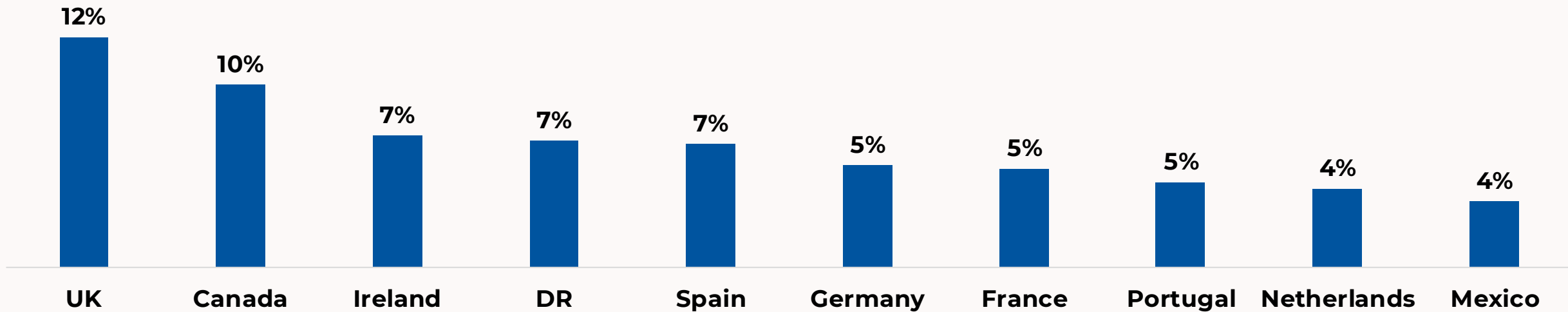
6.4M

NON-STOP SEATS

2026 NON-STOP SEAT CAPACITY TO NEW ENGLAND

The UK and Canada lead nonstop seat capacity to New England, with the top 10 markets representing 65% of total capacity.

2026 Nonstop Seat Capacity to New England by Market (% Share)



A dynamic photograph of two windsurfers performing a loop-the-loop maneuver on a wave. The windsurfer in the foreground is upside down, with their red and white sail trailing behind them. The windsurfer in the background is also upside down, with a yellow and red sail. The water is a vibrant blue-green, and white foam is visible from the wave. The overall scene is energetic and action-packed.

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OUR MARKETING IN ACTION

AMERICA THE BEAUTIFUL

A scenic view of a desert landscape with red rock formations and three hikers on a rocky outcrop. The sky is a clear, deep blue, and the ground is a mix of sand and sparse vegetation. The rock formations are layered and jagged, with some reaching high into the air. Three hikers are standing on a flat, rocky surface in the middle ground, looking out over the vast landscape. The overall mood is one of natural beauty and adventure.

STORYTELLING

B2C
MARKETING

PARTNERSHIP

TRADE
ENGAGEMENT

PUBLIC
AFFAIRS

PLATFORM OBJECTIVES

Drive direct **ECONOMIC IMPACT** for the economy from international visitors, supporting American businesses and jobs.

Emphasize **HIGH VALUE TRAVELERS** who will infuse more spending into the American economy.

BREAK THROUGH MEDIA FILTERS by tapping into Americana and nostalgia.

Generate **EXCITEMENT** to visit the U.S. from travelers who **LOVE** America's people and culture.

Leverage the energy from **ICONIC EVENTS**.



PLATFORM MANIFESTO

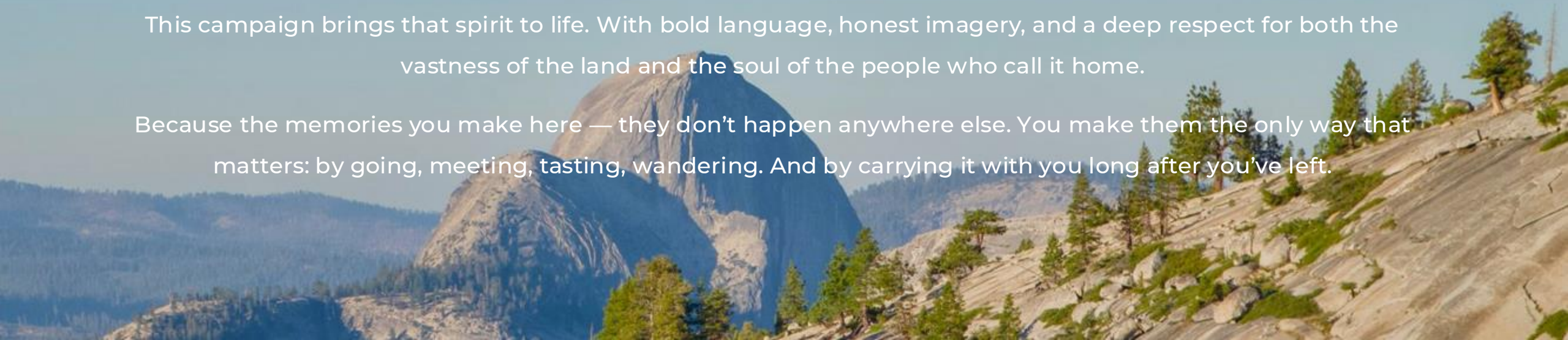
AMERICA THE BEAUTIFUL

America the Beautiful isn't just a campaign. It's an invitation — to show up, look around, and let the place get into your heart. A place shaped by people, stories, and the kind of moments that don't let go.

Here, beauty is in the eclectic. Sometimes it's a sunrise over red rock. Other times, it's a greasy spoon at midnight. It's the laugh you share with a stranger on a hiking trail, or a meal that turns into a memory. It's finding yourself in places you've only ever seen on screen — and realizing they're real.

This campaign brings that spirit to life. With bold language, honest imagery, and a deep respect for both the vastness of the land and the soul of the people who call it home.

Because the memories you make here — they don't happen anywhere else. You make them the only way that matters: by going, meeting, tasting, wandering. And by carrying it with you long after you've left.



PLATFORM STRATEGIC FRAMEWORK

BUSINESS GOAL	DRIVE ECONOMIC GROWTH BY ATTRACTING PERSUADABLE INTERNATIONAL TRAVELERS			
MARKETING GOAL	BRAND PERCEPTION, INTENT, ENGAGEMENT			
CREATIVE PLATFORM	AMERICA THE BEAUTIFUL			
JOURNEY PHASE	INSPIRATION		CONSIDERATION	
OBJECTIVE	INCREASE AWARENESS AND FAVORABILITY FOR TRAVELING TO THE USA		INCREASE TRAVEL CONSIDERATION THROUGH CONTENT STORYTELLING & TRIP PLANNING	
TACTICS	Paid Media	Social Media	ATB Traffic Drivers	Video Storytelling
	Earned	Owned	Social (Boosting)	MindTrip AI Planner
	Third-party (Tour operator & Media vendors)	Partnership Integration	Third-party (Tour operator & Content Collabs)	Partnership Integration

Paid Media

Earned

Third—party
(Tour operators & Media vendors)Partnership
Integration

PAID MEDIA APPROACH

UPPER FUNNEL: AWARENESS

Objective: Top-of-mind awareness for U.S. travel

- **Tactics:** CTV/OTT, Online Video (:15/:30)
- **Audiences:** USA Travel Intenders, Lapsed USA Visitors & Thematic-aligned audience segment

MID-FUNNEL: CONSIDERATION

Objective: Drive traffic to website and brand partners' inspirational content

- **Tactics:** Display, native, Retargeting
- **Audiences:** ATB video completers, website visitors, and USA intenders

Paid Media

Earned

Third—party
(Tour operators & Media vendors)

Partnership
Integration

EARNED MEDIA APPROACH



**SPORTS &
ENTERTAINMENT**



LUXURY



OUTDOOR



FAMILY



ROAD TRIP



**SCREEN
TOURISM &
POP CULTURE**



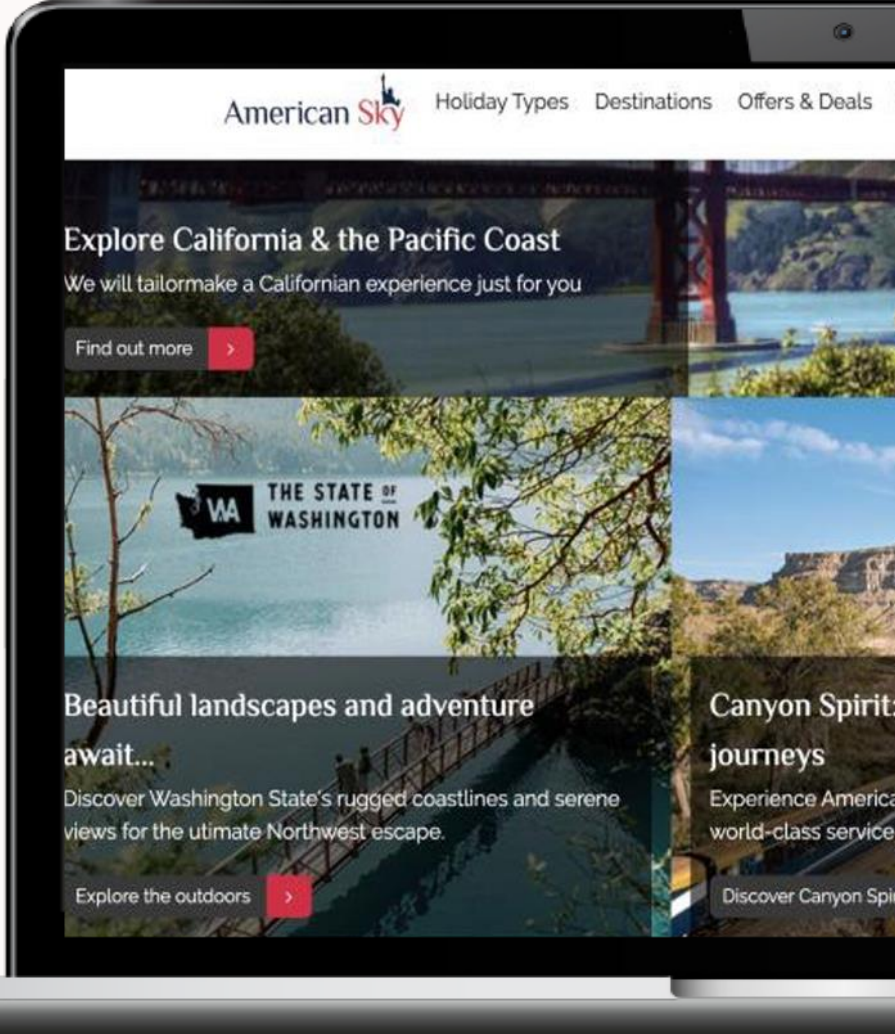
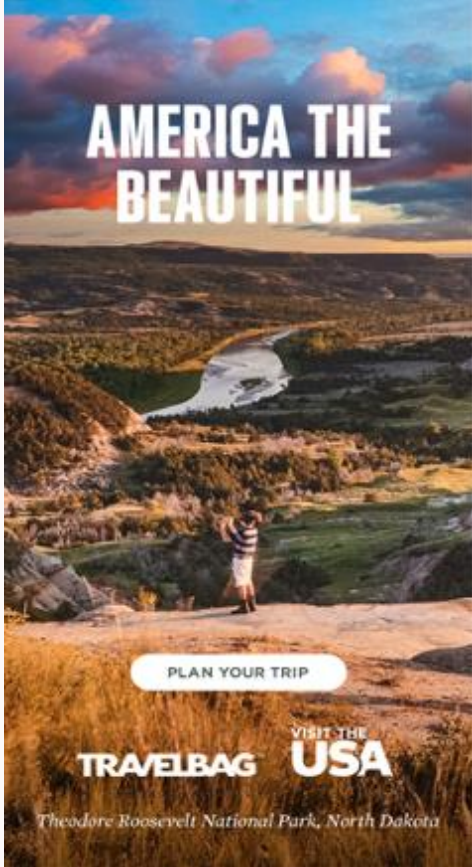
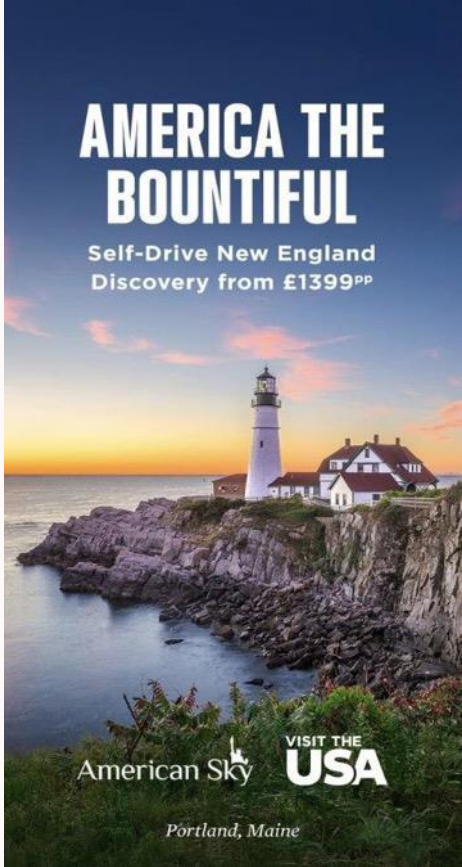
**ARTS &
CULTURE**

Paid Media

Earned

Third—party
(Tour operators & Media vendors)

Partnership
Integration



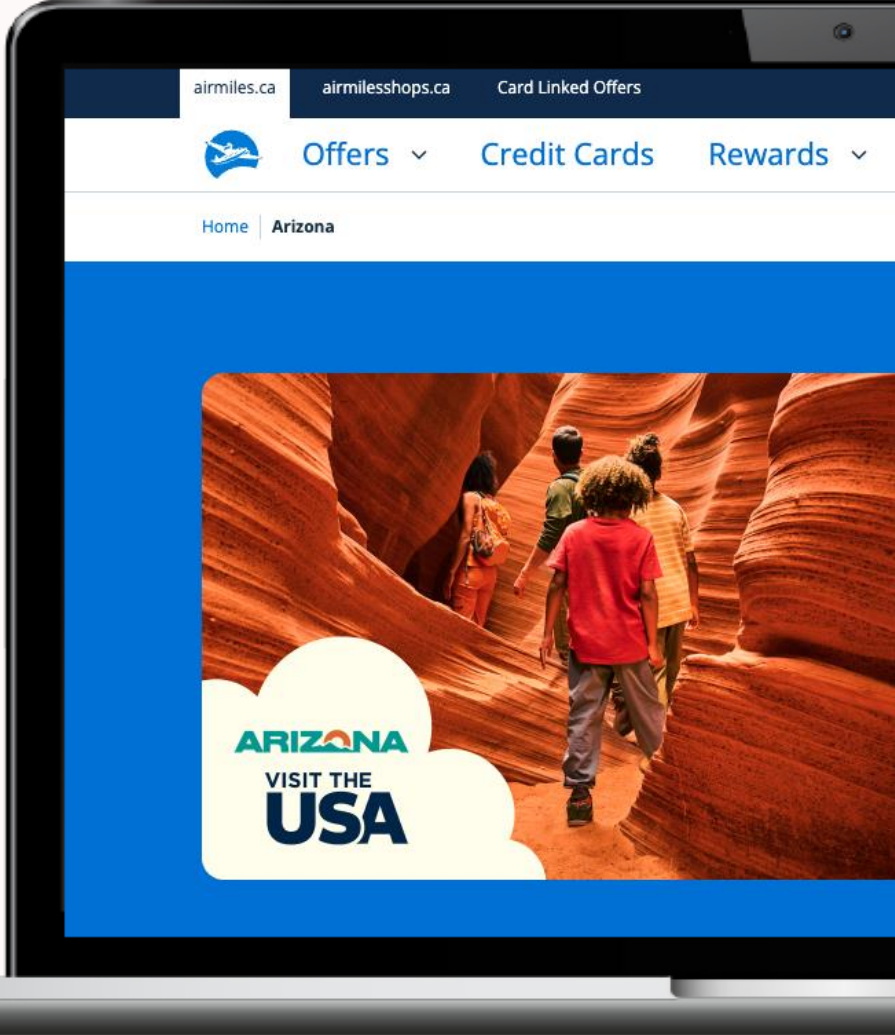
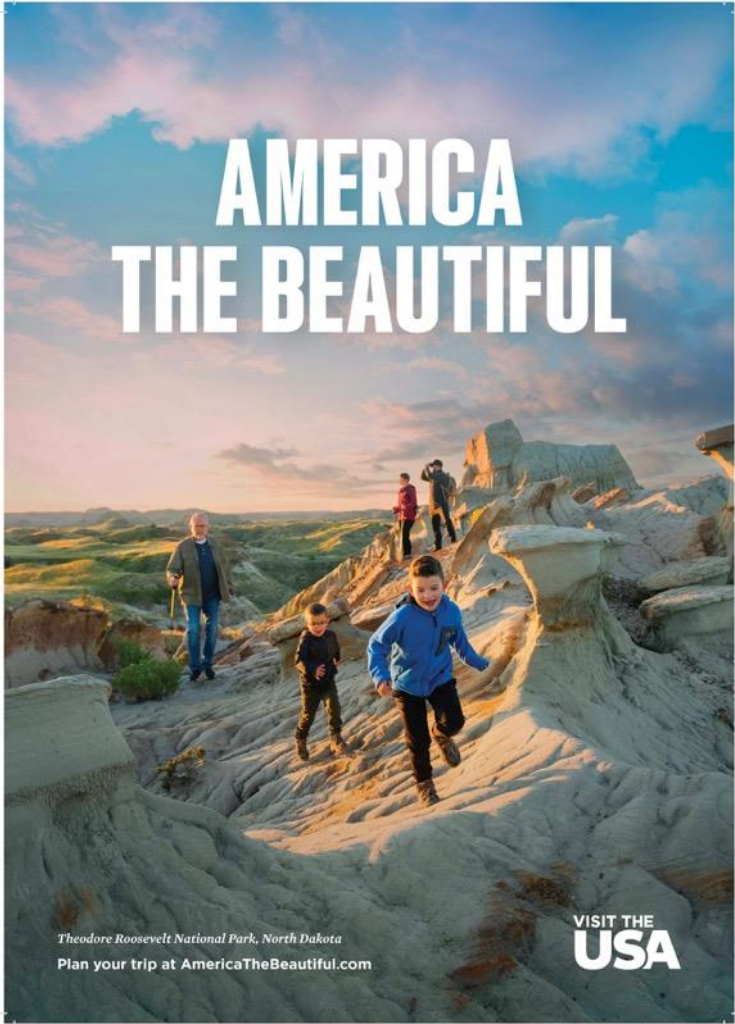
PROMOTING THE MESSAGE THROUGH TOUR OPERATOR CAMPAIGNS

Paid Media

Earned

Third—party
(Tour operators & Media vendors)

**Partnership
Integration**



INTEGRATING OUR U.S. DESTINATION & CORPORATE PARTNERS

An aerial photograph of a city skyline at dusk. The sky is a mix of purple, pink, and blue. In the center, a tall, ornate clock tower with a pointed roof stands out. To its left are several modern skyscrapers with glass facades reflecting the twilight. The foreground is filled with a dense collection of brick and stone buildings of various heights. In the lower right, there's a modern urban park area with green lawns, walkways, and some structures. The overall scene is a vibrant representation of a city's architectural diversity.

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BRAND USA PROGRAMS



Global

Consumer Website Programmatic Promotion (VisitTheUSA.com)

Optimized Audience Campaigns - CA, UK, DE, FR, AU, IN, MX, BR



Canada

Canada Loyalty Program

Travelweek Canada



United Kingdom

Travelbag
Hays Travel
JC Decaux



Germany

CANUSA
TUI



Mexico

Pricetravel



France

Voyage Prive



Australia

Helloworld



India

Hindustan Times
Tata CLiQ



FY26 – FY27 IN-MARKET EVENTS

April 2026

SE Asia Sales Mission

May 2026

IMEX Frankfurt

July 2026

South Korea & Japan
Sales Mission

September 2026

Travel Week UK & Europe

October 2026

Canada Connect

January 2027

Mexico Sales Mission
India Sales Mission

February 2027

New Zealand Expos
Australia B2B Day

March 2027

South American
Sales Mission

PARTNER RESOURCES



Send Brand USA your destination assets

<https://brandusa.mediavalet.com>



Global Communications

Send our team the latest updates about your destination: press@thebrandusa.com



Access our Partner Success Portal

Program information, research insights, and upcoming deadlines



THANK YOU

CONSUMER

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INDUSTRY

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