

The logo for Brand USA, featuring the word "BRAND" in a small, white, sans-serif font above the word "USA" in a larger, bold, white, sans-serif font.

BRAND
USA

Brand USA Summer Board of Directors Meeting

PUBLIC SESSION - Washington, DC

GOVERNANCE

Election of Chair to conduct the closed and public meetings.*



*Vote Required



Chair

Call for vote to approve April Meeting Minutes*

*Vote Required



CEO Remarks



Remembering Casey Canevari



FINANCIAL REPORT

FY25 FINANCIAL HIGHLIGHTS

(as of June 30, 2025)

Total YTD Revenue

\$55.5M

CASH CONTRIBUTIONS - \$42.4M

IN-KIND CONTRIBUTIONS - \$11.7M

SPONSORSHIP - \$1.4M

Total YTD Expenses

\$154.3M



**CURRENT
LANDSCAPE**

BRAND
USA



BRAND
USA



BRAND
USA

AMERICA THE
BLOOMING
BOUNTIFUL
BREATHTAKING
BLISSFUL
BEAUTIFUL



An aerial photograph of a dense urban landscape, likely New York City, featuring a river (the Hudson) and a multi-lane highway. The skyline is filled with numerous skyscrapers, including several with prominent glass facades that reflect the sky. The text "BRAND USA" is superimposed in the center of the image in a large, white, sans-serif font. The word "BRAND" is in all caps and is smaller than the word "USA", which is also in all caps and has a significantly larger font size. The background shows a mix of modern glass buildings and older, more traditional stone structures, with some trees visible along the riverbank.

**BRAND
USA**

America250 Partnership

agenzia di viaggi
magazine

NOTIZIE ▾ STRUMENTI ▾ LAVORO ANNUARIO ADVERTORIAL

Gli Usa compiono 250 anni: grandi manovre per il 2026



01 Luglio 11:00
2025 da Redazione



Gli Stati Uniti si preparano a celebrare il loro 250° anniversario nel 2026. In previsione dell'evento, **Brand Usa**, organizzazione di destination marketing del Paese, e **America250** hanno annunciato una partnership strategica per invitare i visitatori internazionali a scoprire la storia, il patrimonio e la cultura della nazione durante tutto l'anno delle celebrazioni.

«Brand Usa è orgogliosa di collaborare con America250 per mostrare al mondo l'importanza di questa storica ricorrenza», ha dichiarato **Fred Dixon**, presidente e ceo di Brand Usa. «Grazie alla nostra esperienza nel marketing e nella comunicazione internazionale, Brand Usa darà risalto allo spirito e al significato di America250 a livello globale. Attraverso questa partnership, ispireremo i viaggiatori a scoprire i luoghi, le persone e i momenti che definiscono la nostra nazione e li inviteremo a prendere parte a questo traguardo storico», ha aggiunto. In qualità di supporting partner ufficiale di America250, Brand Usa si impegnerà per amplificare il programma delle celebrazioni e per aumentarne la portata e l'impatto.

«In vista del 250° anniversario degli Stati Uniti, siamo entusiasti di collaborare con Brand Usa per invitare il mondo a vivere questa ricorrenza straordinaria – ha dichiarato **Ari Abergel**, executive director di America250 – Questa collaborazione riflette il nostro impegno condiviso a onorare il passato, celebrare il presente e ispirare un futuro radicato nello spirito americano. Insieme, daremo vita alla storia degli Stati Uniti per il pubblico internazionale in modi indimenticabili».

L'annuncio segue il recente lancio della nuova campagna turistica globale di Brand Usa, **America the Beautiful**, che invita il mondo a scoprire i paesaggi mozzafiato e le esperienze autentiche che caratterizzano il Paese. Nell'ambito di questa iniziativa, Brand Usa metterà in risalto le celebrazioni dell'anniversario attraverso itinerari di viaggio curati e narrazioni coinvolgenti, capaci di connettere i visitatori a persone e luoghi che incarnano lo spirito americano.

Italy

TRAVELWEEKLY

NEWS IN DEPTH DESTINATIONS MEDIA COMPETITIONS JOBS EVENTS TRAVEL WEEKLY HUB LATEST EDITION

Brand USA signs up to drive visitors during 250th anniversary year

Jun 27, 2025 11:26 GMT by Phil Davies



Brand USA has forged a strategic partnership to inspire international travellers to explore the country during its 250th anniversary in 2026.

The destination marketing organisation is to collaborate with America250, the US semiquincentennial commission established by Congress in 2016 to plan and orchestrate the 250th anniversary of the signing of the Declaration of Independence.

Brand USA will work to "amplify" anniversary programming and broaden the reach and impact of the celebrations as an official America250 supporting partner.

The deal follows Brand USA's new global American the Beautiful international tourism campaign.

Brand USA chief executive Fred Dixon said: "With our expertise in international marketing and storytelling, Brand USA is uniquely positioned to highlight the spirit and significance of America250 globally.

TravelWeekly UK

Brand USA partners with America250 to promote 250th anniversary globally

Supporting USA's 250th Independence Day through international storytelling and campaigns

2025-06-27 / By India Outbound / New Delhi / Trade News

SHARE   



The collaboration will support programming related to the semiquincentennial: Brand USA

Brand USA, the destination marketing organisation for the United States, has announced a partnership with America250 ahead of the country's 250th anniversary of independence in 2026. The partnership aims to promote US history, heritage and culture to international travellers during the anniversary year.

With the 250th anniversary of American independence around the corner, the destination marketing organisation for the United States, Brand USA, has announced a partnership with America250 to promote US history, heritage and culture to international travellers.

In a press statement, [Brand USA](#) says that the collaboration will support programming related to the semiquincentennial and extend its reach among global audiences.

India Outbound

Canada
Connect



2025 UK & Europe
Destination
Immersion:
Michigan

IMEX
Frankfurt



Flight Centre

Brand USA drives business
to communities across the United States.

The logo for Brand USA, featuring the word "BRAND" in a small, white, sans-serif font above the word "USA" in a large, bold, white, sans-serif font.

BRAND
USA

The title "RESEARCH UPDATE" in a large, bold, white, sans-serif font, centered horizontally across the middle of the image.

RESEARCH UPDATE

U.S. INBOUND VISITATION — 2025 YTD & FORECAST



2025 JAN - APR U.S. INTERNATIONAL VISITATION (Includes Canada & Mexico)

From January through April 2025, the U.S. welcomed 21.6 million international visitors — representing a 1.1% decrease compared to the same period in 2024.

-1.1%

TOTAL INTERNATIONAL

VS JAN – APR 2024

-14.5%

CANADA

VS JAN – APR 2024

+15.4%

MEXICO

VS JAN – APR 2024

2025 JAN - JUN U.S. OVERSEAS VISITATION

(Excludes Canada & Mexico)

From January to June 2025, the U.S. welcomed 15.9 million overseas visitors—down just 1% year-over-year. Notably, the top 20 overseas source markets declined by only 0.3% year-to-date.

15.9 M

TOTAL OVERSEAS VISITORS

JAN – JUN 2025

-1.2%

TOTAL OVERSEAS VISITORS

VS JAN – JUN 2024

-0.3%

TOP 20 MARKETS

VS JAN – JUN 2024

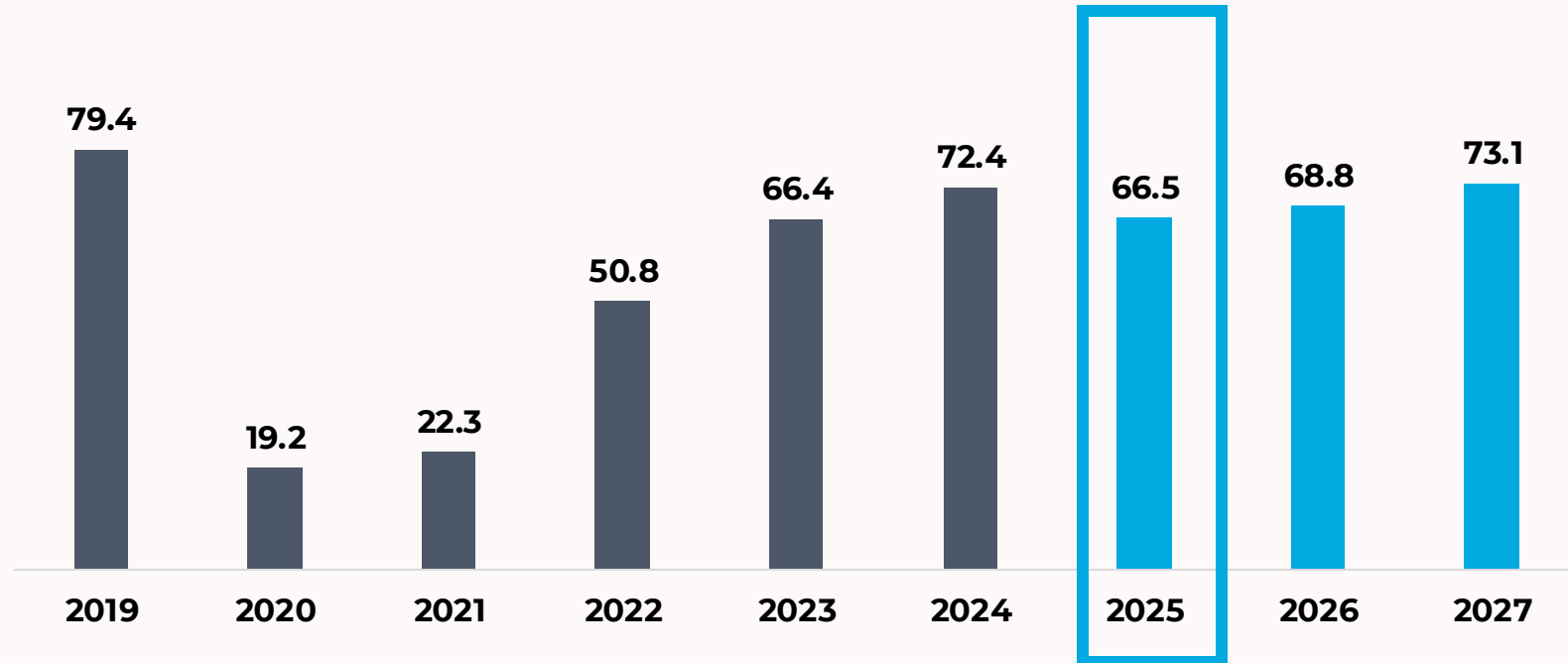
2025 JAN - JUN U.S. OVERSEAS VISITATION: TOP 10 MARKETS (Excludes Canada & Mexico)

From January to June 2025, the UK was the top overseas market for U.S. inbound visitation, while Italy posted the strongest year-over-year growth.

	2025 YTD Arrivals	YOY % Change
United Kingdom	1,851,000	2%
India	1,095,000	-2%
Brazil	952,000	6%
Japan	856,000	4%
Germany	808,000	-9%
China	755,000	3%
South Korea	743,000	-11%
France	732,000	-8%
Italy	503,000	9%
Colombia	482,000	-2%
Other Overseas	7,144,000	-1%
Total Overseas	15,921,000	-1%

U.S. INTERNATIONAL TRAVEL FORECAST: TOTAL

Tourism Economics forecasts 66.5 million inbound international visitors in 2025—down 5.9 million (–8.2%) from 2024, but growth is expected to resume in 2026.



U.S. INTERNATIONAL TRAVEL FORECAST: 2025 TOP 10 MARKETS

Despite year-over-year drops, Canada and Mexico remain the top two source markets by a significant margin.

	2025 Forecast	YOY % Change
Canada	16,145,000	-20%
Mexico	16,128,000	-5%
United Kingdom	3,917,000	-3%
India	2,212,000	1%
Brazil	1,941,000	2%
Japan	1,924,000	4%
Germany	1,800,000	-10%
China	1,588,000	-2%
France	1,563,000	-8%
South Korea	1,529,000	-10%
Total Overseas	34,187,000	-3%
Total International	66,460,000	-8%

AIRLIFT



RECORD NON-STOP SEAT CAPACITY & CONNECTIVITY

Non-stop seat capacity surpassed pre-pandemic levels in 2024 and continues to grow in 2025

262

ORIGIN AIRPORTS

103

ORIGIN COUNTRIES

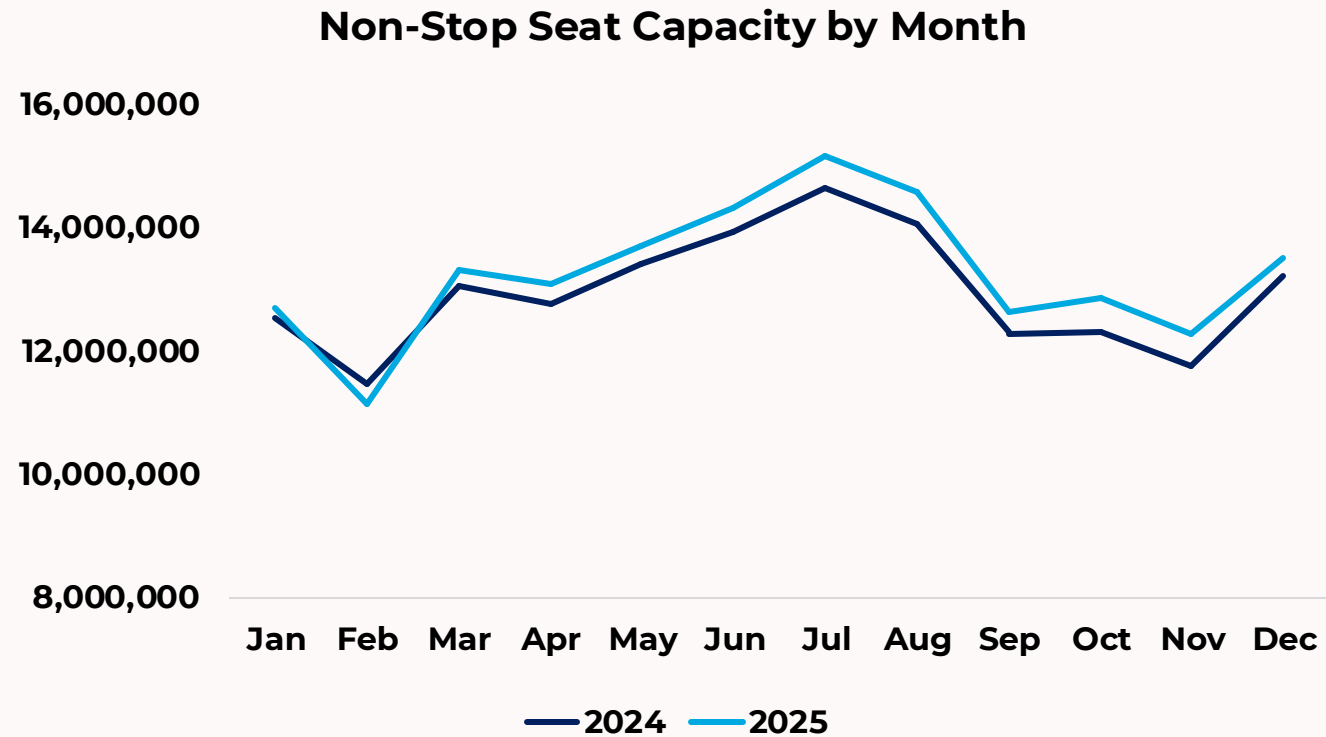
163M

NON-STOP SEATS

NON-STOP SEAT CAPACITY – BY MONTH

Scheduled non-stop inbound seat capacity to the U.S. in 2025 is currently tracking 2% higher than 2024.

February 2025 was the only month with a year-over-year decline, due to the calendar shift from 29 days in 2024 to 28 days in 2025.



NON-STOP SEAT CAPACITY – 2025 TOP 10 MARKETS

These top 10 markets have the largest number of available non-stop seats to the United States.

The UK and Canada are the only top 10 markets with a year-over-year decrease (2025 vs 2024) in capacity.

Top 10 Markets by Non-Stop Seat Capacity			
Market	2025	2024	YOY % Change
Mexico	25,252,349	24,777,130	2%
Canada	18,898,989	19,364,819	-2%
United Kingdom	12,957,019	13,112,841	-1%
Germany	6,587,705	6,527,156	1%
Dominican Republic	5,864,338	5,675,503	3%
Japan	5,823,850	5,664,263	3%
France	5,523,988	5,459,630	1%
Italy	3,836,424	3,408,770	13%
South Korea	3,696,894	3,443,198	7%
Netherlands	3,554,300	3,533,854	1%

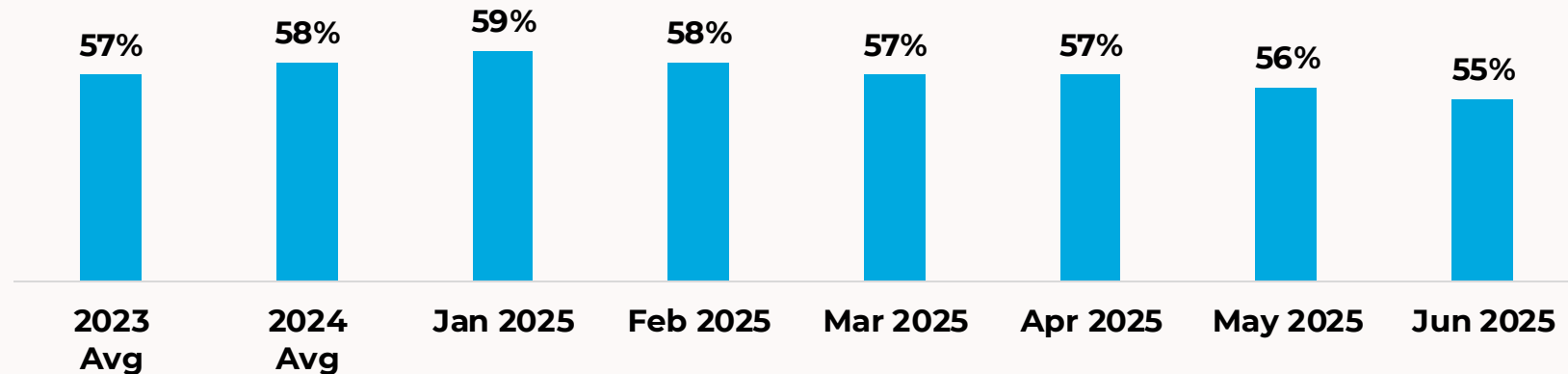
CONSUMER SENTIMENT



INTERNATIONAL LEISURE TRAVEL INTENT SOFTENS SLIGHTLY

International leisure travel intent remained stable in early 2025, however, a modest decline is visible in Q2, with intent levels gradually softening.

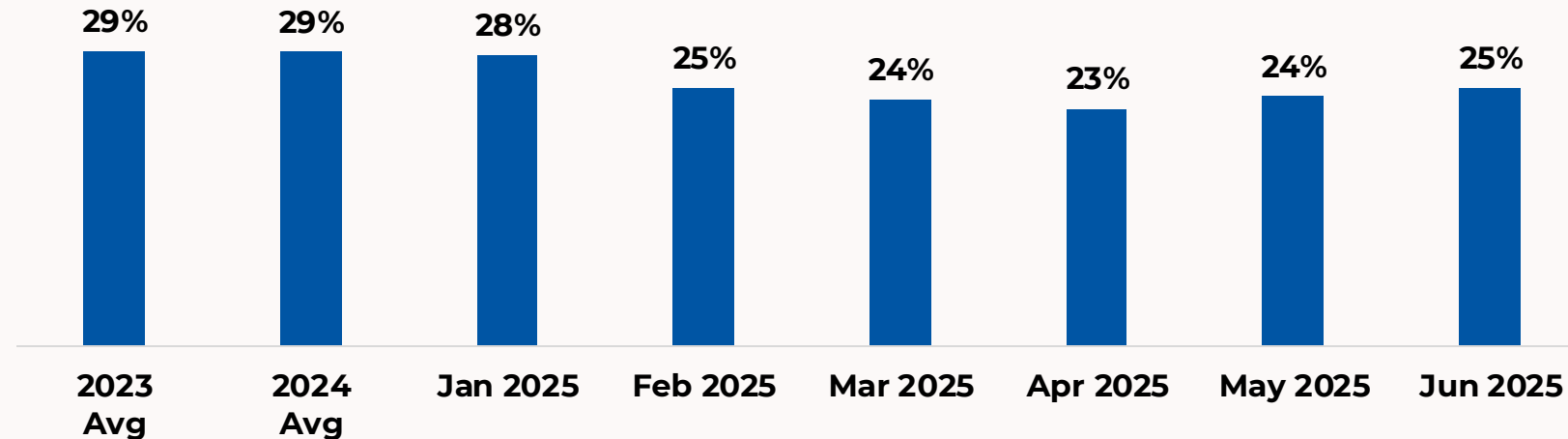
Likelihood to Travel Internationally in the Next 12 Months (% Very or Somewhat Likely)



INTEREST IN VISITING THE UNITED STATES SHOWS SIGNS OF STABILIZING

U.S. travel intent has picked up slightly over the past two months — a promising shift following a steady early-year decline.

Likelihood to Travel to the USA in the Next 12 Months



Q. In the NEXT 12 MONTHS, what country or countries will you visit on your international holiday(s)? - % United States

Base: Likely to take an international holiday in the next 12 months

Source: Big Village's Caravan Omnibus Study, June 2025

THE UNITED STATES LEADS FOR LEISURE TRAVEL IN THE NEXT 12 MONTHS

Top Destinations Considered on Next International Leisure Trip – June 2025

#1 Overall

DESTINATION LIKELY TO
VISIT GLOBALLY

– 10 MARKET AVERAGE

#1

DESTINATION LIKELY TO VISIT IN
**BRAZIL, CANADA, JAPAN, AND
MEXICO**

#1 Long Haul

DESTINATION LIKELY TO VISIT
IN **FRANCE, GERMANY, SOUTH
KOREA, AND THE UK**

Q: In the NEXT 12 MONTHS, what country or countries will you visit on your international holiday(s)? SELECT ALL THAT APPLY

Base: Likely to take an international holiday in the next 12 months

Source: Big Village's Caravan Omnibus Study, June 2025



BRAND
USA

AMERICA THE BEAUTIFUL

THE EYES OF THE WORLD ARE ON THE UNITED STATES.

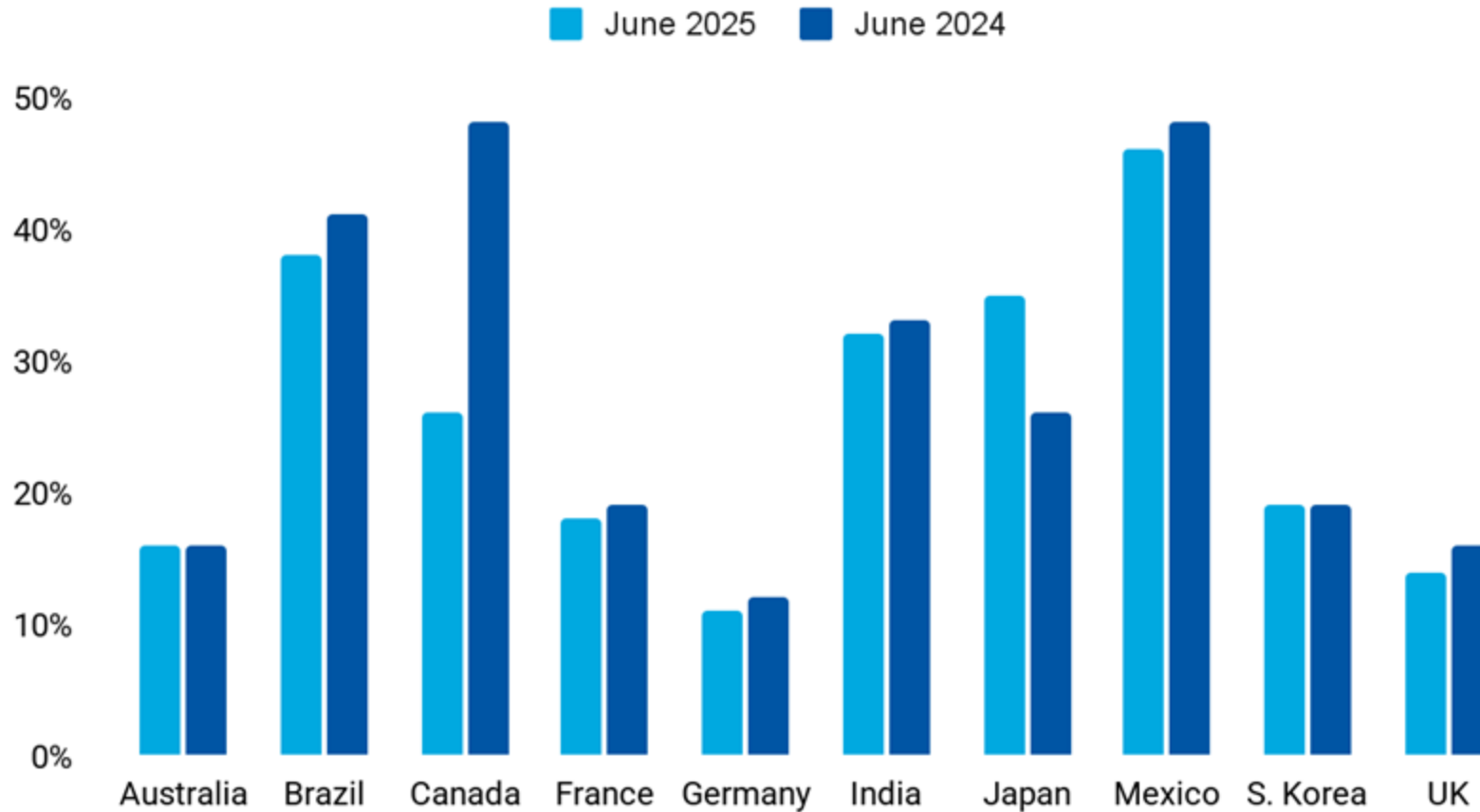
We need to direct that attention to what the world loves most about the U.S.

BUT FIRST,

We need to recognize the current landscape and to inform our strategy and plan.

INTENT TO TRAVEL TO THE U.S. IS DOWN OR FLAT ACROSS MOST MARKETS

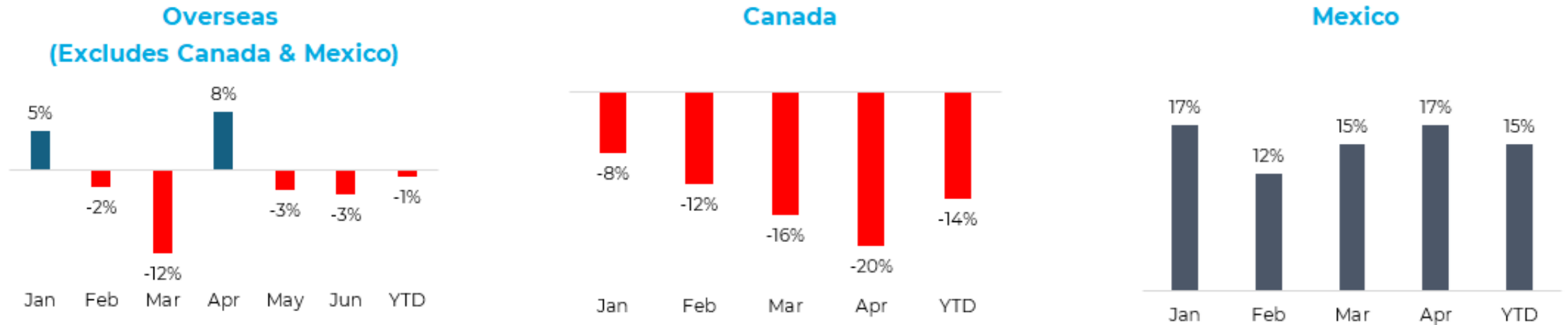
Likelihood to Travel to the U.S. in the Next 12 Months



ACTUAL INTERNATIONAL VISITS TO THE U.S. ARE DOWN YEAR-TO-DATE FROM A PROJECTED 9% INCREASE

International Visits to the United States in 2025

Year over Year Change, by Month and Year-to-Date



Source: U.S. Department of Commerce/NTTO, July 2025

DISTILLING THE DATA

- Despite the current landscape, ***travelers are still choosing to visit*** the United States from our key markets.
- In particular, those with stronger economic means including **high value travelers** remain key opportunities.
- International audiences are still consuming American content and culture at high levels.
- International audiences are highly invested in marquee events to be featured in the U.S. in the years ahead.
- We must maintain our current share and leverage that base to reignite travel to the U.S. over time.

THE ASSIGNMENT



**AT THE MOMENT, THE U.S. TRAVEL
INDUSTRY NEEDS VISION,
OPTIMISM, AND A RALLYING CRY.**

CAMPAIGN OBJECTIVES

- Drive direct **ECONOMIC IMPACT** for the American economy from international visitor spending that supports American businesses and jobs.
- Layer extra emphasis on **HIGH VALUE TRAVELERS** who will directly infuse more spending into the American economy.
- **BREAK THROUGH MEDIA FILTERS** with a campaign that features the American people and taps into Americana, nostalgia, and epic experiences across the United States.
- Generate **EXCITEMENT** to visit the U.S. from travelers who **LOVE** America, its people, and its culture.
- Leverage the energy from world's most **ICONIC EVENTS** to showcase host cities across the U.S.



AMPLIFYING ICONIC GLOBAL EVENTS

America is set to host the most widely viewed events in the world. Over the next four years we will host the **2026 FIFA World Cup, America 250**, the XXXIV Summer Olympic Games, the Ryder Cup, multiple F1 races, and more.

These events will be watched by billions and each is an opportunity to highlight American legacy and greatness, while showcasing multiple U.S. cities across the nation, including their people and traditions.

America the Beautiful will create content that harnesses and amplifies the energy of these events turning them into de facto advertisements for the United States.



CREATIVE APPROACH





CREATIVE APPROACH

INSIGHT

Visitors don't just come to see America.

They come to feel it.

They seek connection.

They crave memories that last a lifetime.

They yearn to be a part of something bigger.

CREATIVE APPROACH

Tone is everything.

OPTIMISTIC	Channeling the best feelings of travel
CONFIDENT	Strong and compelling
ENERGETIC	It should feel magnetic and exciting
FUTURE-LOOKING	Embrace a future-tense and long-term view
PROUD	Not bragging, but a humble pride in our nation and people



AMERICA THE BEAUTIFUL

The land of bold experiences and unforgettable memories.

America The Beautiful isn't just a campaign. It's a warm and bold invitation. To come experience something special. To taste, touch, and carry home experiences that become core memories. Only in America can you wake in a desert that feels like another planet, and end the day at a diner that feels like a film set. Only here do landscapes stretch into legend. Only here does the ordinary glow with something unspeakable.

From towering parks to corner joints serving pie and conversation, this country isn't meant to be visited, but to be felt.

This campaign captures that spirit through bold typography, unfiltered photography, and language that speaks with clarity and conviction. There are a thousand ways to describe America but only one way to truly know it: by visiting it.

America The Beautiful invites the world to see what they've never seen before. And to leave with something they didn't know they needed.



MESSAGING FRAMEWORK



MESSAGING FRAMEWORK

Our communications framework has four pillars: inspiration, interest-based, education, and partner-led conversion.

Inspiration: Visual and emotional storytelling that emphasizes human-to-human connection and is designed to encourage travelers to consider visiting the United States.

Interest-Based: Thematic content that appeals to specific audience interests and motivations for travel using imagery, experiences, locations, and storytelling that help visitors imagine themselves in the U.S.

Entry/Exit Information: Content designed to prepare and reassure travelers with likely travel intent about a visit, including functional elements (entry requirements) and experiential (itineraries and events).

Conversion: Partner-led efforts designed to pull intenders through to booking.

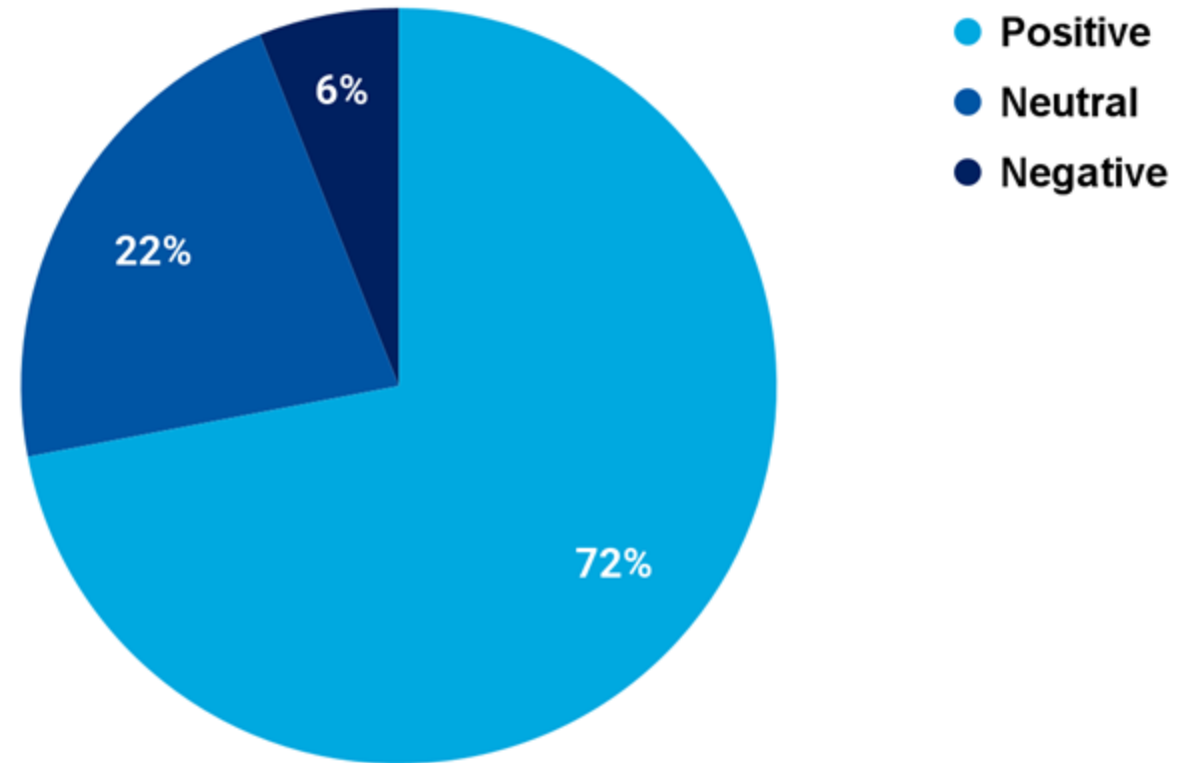


CREATIVE TESTING

CREATIVE TESTING CONFIRMS STRONG POSITIVE RECEPTION

72% of respondents across 10 key markets rated the advertising positively.

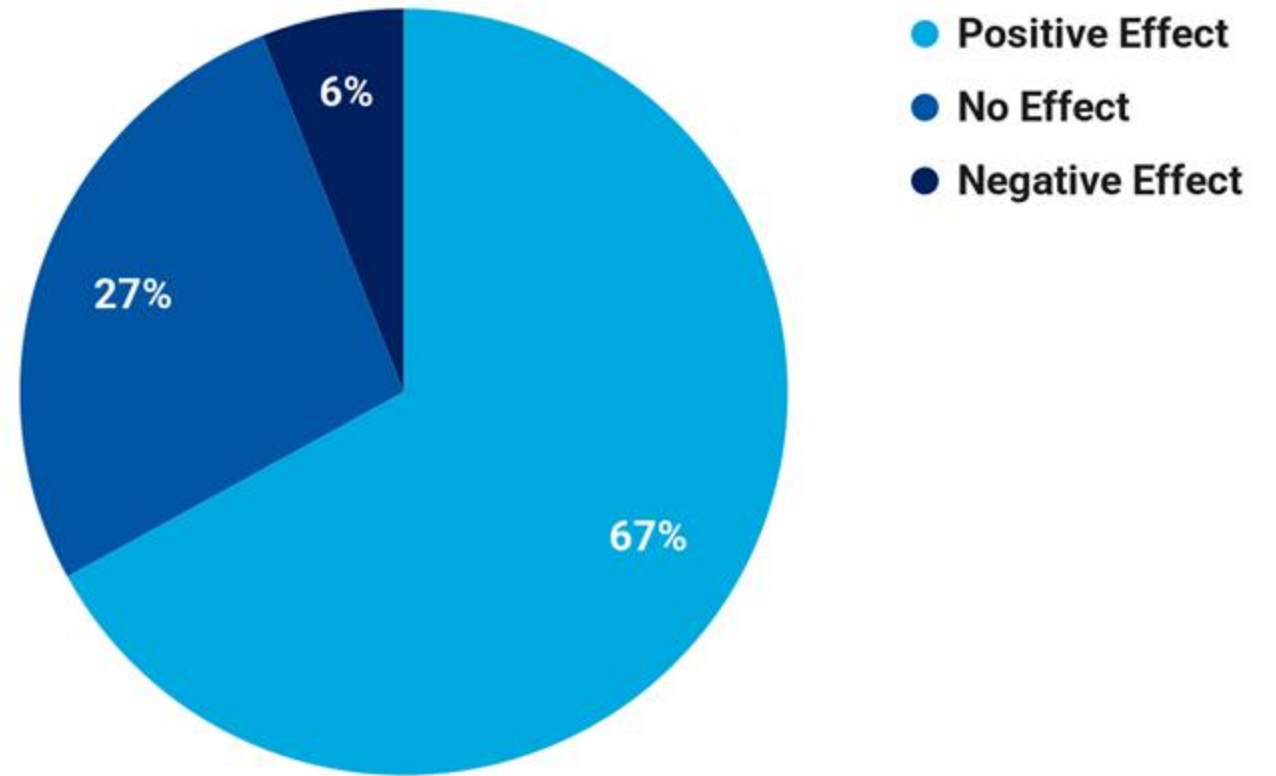
Only 6% expressed any form of negative opinion, while 22% remained neutral — highlighting a broadly favorable response.



CREATIVE BOOSTED DESIRE TO VISIT THE UNITED STATES

Two-thirds of respondents (67%) said the creative increased their desire to visit the USA — split evenly between a strong and slight positive effect.

Just 6% reported a negative reaction, while 27% said the creative had no impact.





AMERICATHEBEAUTIFUL.COM

Groundbreaking Innovation &
Long-Term Digital Strategy

July 17, 2025

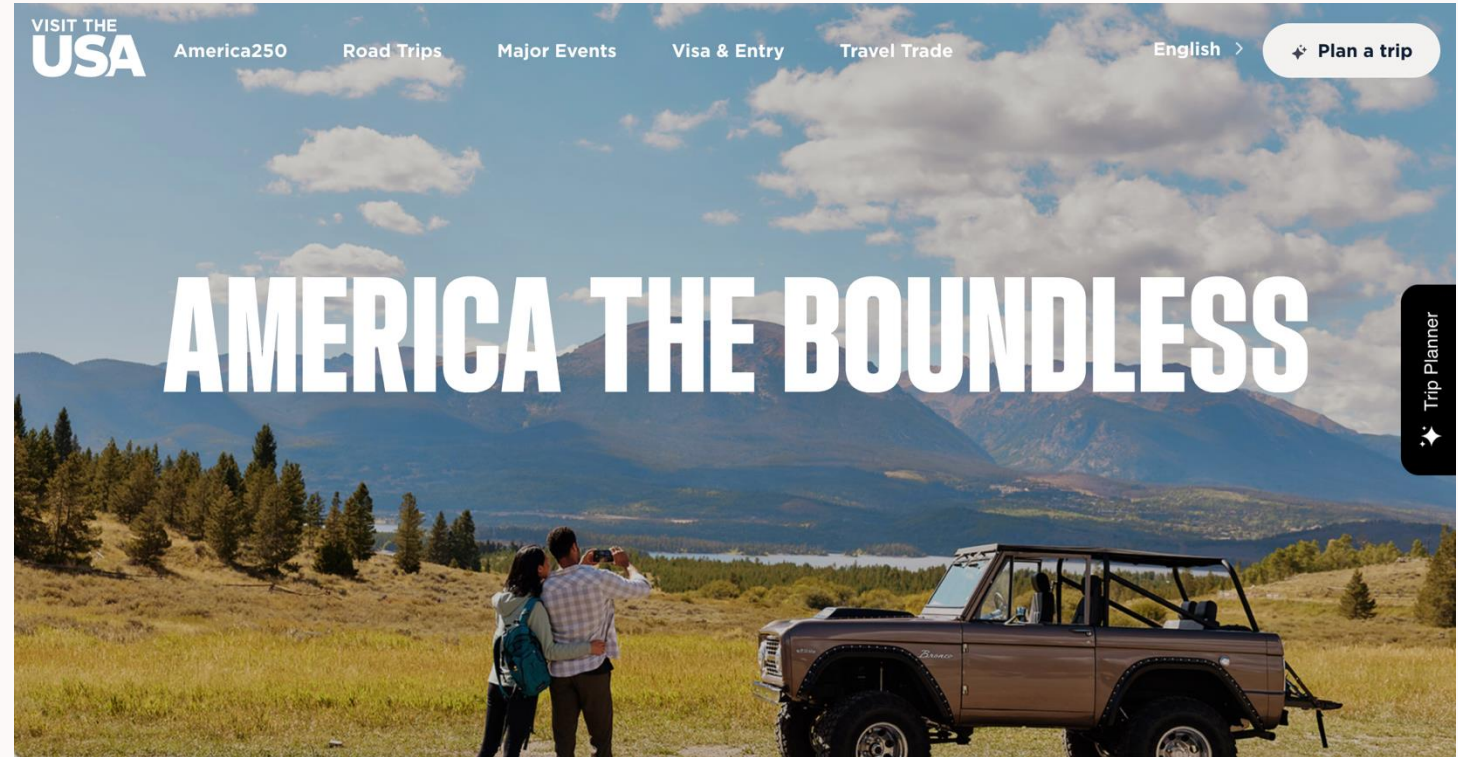
CAMPAIGN SITE STRATEGY

Leverage planning tools, translations, and story-driven content to create personalized travel experiences.

MindTrip AI Trip Planner: AI-powered recommendations via tailored prompts to create custom itineraries with visuals, maps, and reviews.

WeGlot AI Translations: AI-powered translations to improve speed-to-market and cost effectiveness, with flexibility to leverage native linguist review to edit generated copy.

Interactive Maps: Highlighting international entry points and nearby attractions to drive longer stays and visitation beyond large cities.



SITE EVOLUTION

Ongoing evolutions include increased focus on international travelers, audience segmentation and personalization, and incremental inspirational content driving deeper engagement.

Content Personalization: Using audience segmentation, media targeting, and user behavior, we will create dynamic user journeys to improve visitor experience and site performance.

Video: To showcase the USA's incredible people and places, we are rolling out different video components that build connection and capture interest.

Enhanced Mapping: Additional regional layers and movement to develop geographic orientation within the country, and push visitors to discover more.



AMERICA THE BEAUTIFUL

✦ Get travel ideas

✦ Show me incredible views

✦ Find more

A nighttime photograph of the Las Vegas skyline, featuring the New York-New York Wheel and various illuminated buildings, with the Sierra Nevada mountains visible in the background under a twilight sky.

BRAND
USA

LOOKING AHEAD

Month Day, Year



BRAND
USA

ADJOURN


CONSUMER

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INDUSTRY

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