

An aerial photograph of a large, clear lake with vibrant turquoise and blue water. The water is exceptionally clear, revealing numerous large, light-colored rocks scattered throughout the shallow areas. In the foreground, two kayakers are visible: one in a red kayak and another in a yellow kayak. The middle ground features several small, rocky islands and peninsulas, each densely populated with tall, green coniferous trees. A sandy beach is visible on one of the smaller islands. The background shows a vast expanse of the lake stretching towards distant, forested mountains under a clear blue sky with a few wispy clouds. The overall scene is a picturesque representation of a natural outdoor recreation area.

**BRAND
USA**

Travel Nevada—Brand USA

**BRAND USA WORKS TO INCREASE
INTERNATIONAL VISITATION TO THE
UNITED STATES IN ORDER TO FUEL THE
U.S. ECONOMY AND ENHANCE THE IMAGE
OF THE UNITED STATES WORLDWIDE.**



Where
Brand USA
Fits In

Regional DMOs

State DMOs

Local DMOs



PROMOTION

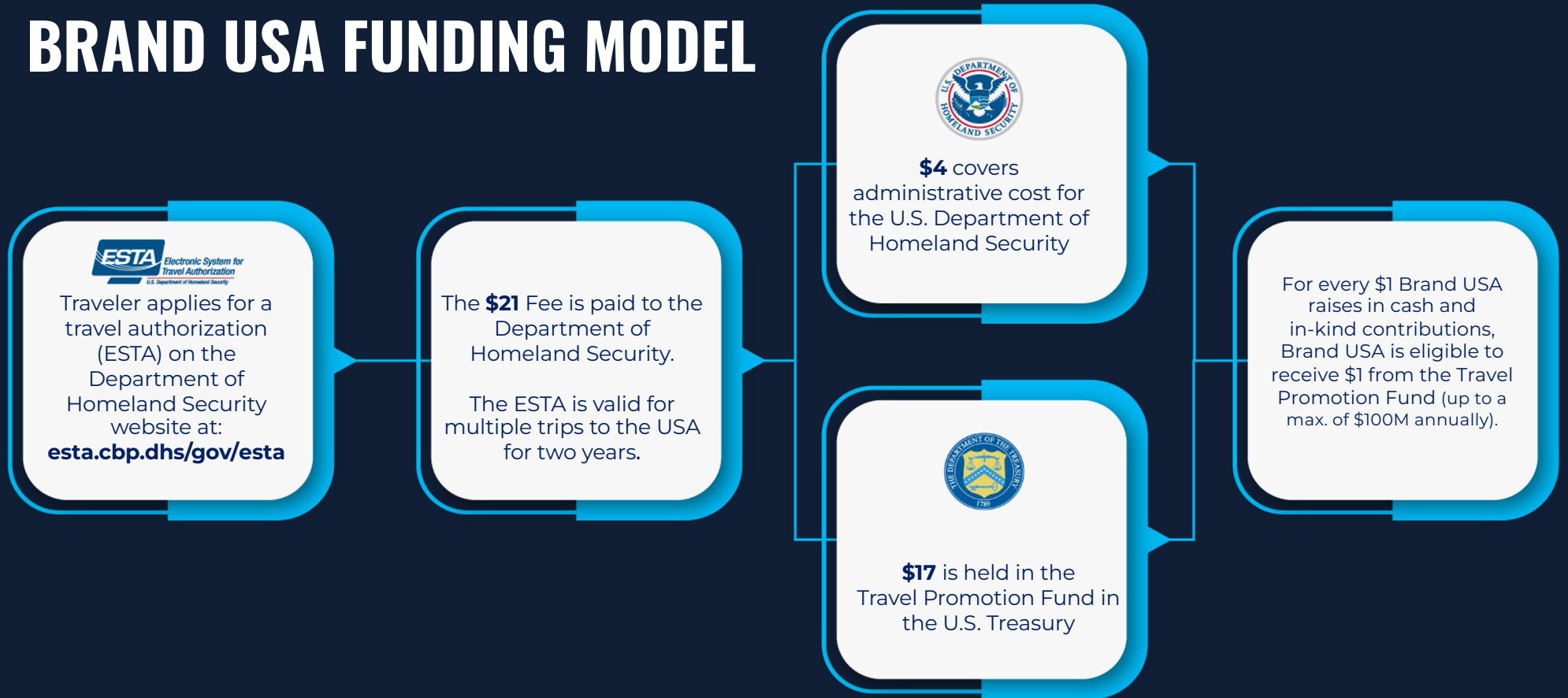


ADVOCACY



POLICY

BRAND USA FUNDING MODEL



An aerial night photograph of a large festival or fair. The scene is filled with vibrant, multi-colored lights in shades of blue, purple, pink, and green. In the upper portion of the image, a massive display of fireworks bursts in the dark sky, with large plumes of pink and purple smoke. Below the fireworks, a dense crowd of people is visible, illuminated by the festival's lights. Various structures, including what appears to be a large illuminated tent or pavilion, are scattered throughout the festival grounds. The overall atmosphere is festive and celebratory.

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UNITED STATES VISITATION SNAPSHOT

68.3 MILLION INTERNATIONAL ARRIVALS IN 2025

Down 6% (4.1M) vs 2024



+6%

1.0 MILLION MORE
VISITORS FROM MEXICO



-21%

4.2 MILLION FEWER
VISITORS FROM CANADA



-2%

870K FEWER
OVERSEAS VISITORS



2025 SPEND PER VISITOR INCREASES DESPITE LOWER VOLUME

\$250B

TOTAL SPENDING FROM
INTERNATIONAL
VISITORS TO THE USA

-1% YOY

\$686M

AVERAGE DAILY
SPENDING

\$3,600

AVERAGE SPEND PER
INTERNATIONAL VISITOR

+5% YOY

An overhead view of a business meeting around a wooden table. A man in a light blue shirt is pointing at a laptop screen displaying a dashboard with various charts and graphs. Other participants are looking at documents and a tablet. The scene is professional and collaborative.

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2026 YTD & FORECAST



OVERSEAS ARRIVALS SHOW EARLY SIGNS OF STABILIZATION

Following sustained declines in 2025, early 2026 results are leveling off, with performance varying by market.



5.3M

OVERSEAS VISITORS



+0%

FLAT YOY



+2%

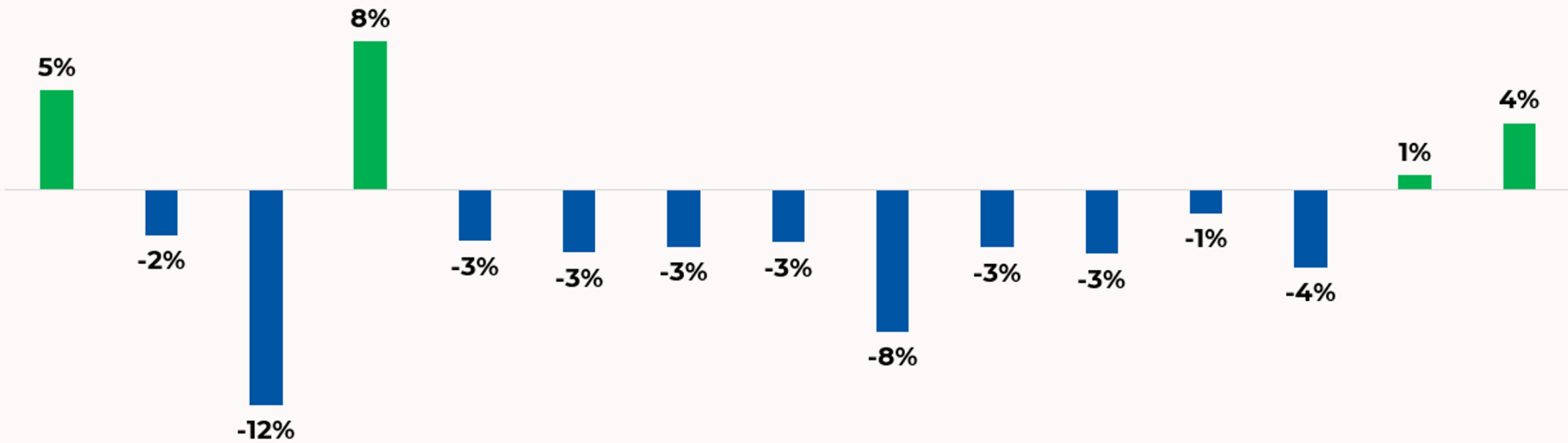
TOP 20 MARKETS YOY

Source: U.S. Department of Commerce/NTTO, March 2026

FIRST MONTH OF GROWTH AFTER EXTENDED DECLINES

February 2026 marked the first return to growth after a sustained decline, with March continuing the positive year-over-year trend.

Overseas Arrivals – YOY% Change by Month

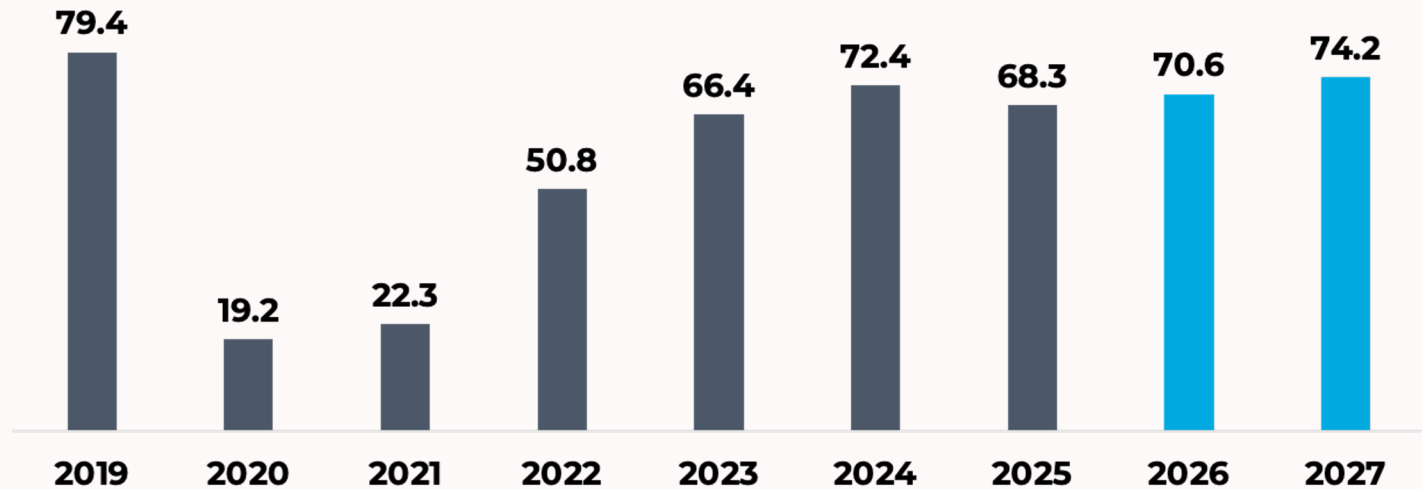


Jan 25 Feb 25 Mar 25 Apr 25 May 25 Jun 25 Jul 25 Aug 25 Sep 25 Oct 25 Nov 25 Dec 25 Jan 26 Feb 26 Mar 26

VISITATION GROWTH EXPECTED IN 2026

International visitation is projected to reach approximately 70.6 million in 2026, representing +3% YoY growth (+2.3M visitors).

International Arrivals (Millions)



Source: U.S. Department of Commerce/NTTO, January 2026; Tourism Economics, April 2026, forecast in millions

GROWTH EXPECTED ACROSS MOST KEY MARKETS

Nine of the top ten inbound markets are projected to grow in 2026, with growth ranging from 3% to 6%.

Market	2026 Forecast	YOY % Change
Mexico	18,532,950	3%
Canada	17,029,610	6%
United Kingdom	4,192,979	3%
Japan	2,041,417	4%
India	1,988,707	-3%
Brazil	1,988,510	4%
Germany	1,831,956	3%
South Korea	1,738,290	6%
France	1,650,137	4%
China	1,639,936	5%
Total International	70,597,260	3%



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AIRLIFT & ACCESS



SEAT CAPACITY TO THE USA REMAINS STABLE IN 2026

Total international seat capacity to the U.S. remains flat year-over-year in 2026.

Non-Stop Seat Capacity		
Market	Jan – Dec 2026	Δ YOY
Mexico	24,329,598	-4%
Canada	18,396,680	-1%
United Kingdom	12,439,833	-3%
Dominican Republic	6,553,504	+2%
Germany	6,454,079	-2%
Japan	6,213,394	-2%
France	5,603,294	+2%
South Korea	4,339,362	-1%
Italy	4,098,362	+9%
Colombia	3,545,380	+3%
Total International	160,882,391	0%

NON-STOP CONNECTIVITY AT RECORD LEVELS

Following strong growth through 2024 and 2025, nonstop international seat capacity remains at elevated levels in 2026.

30

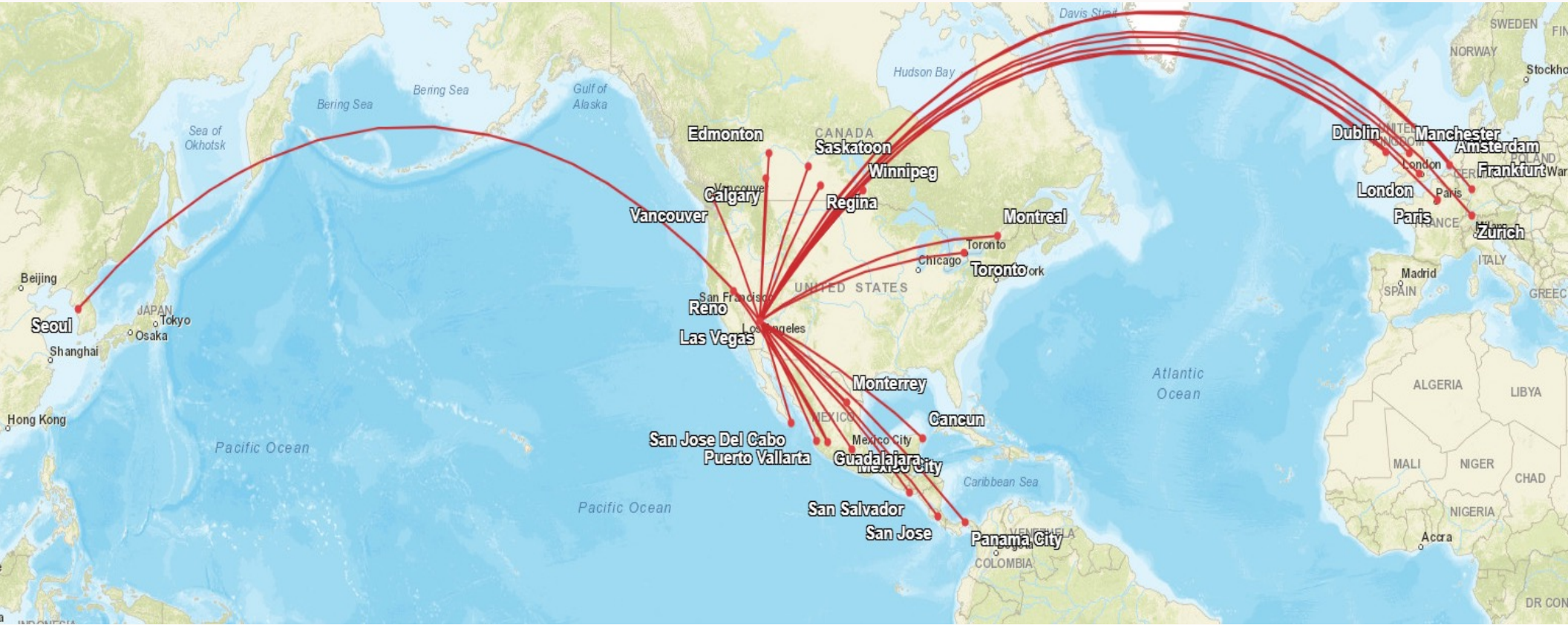
ORIGIN AIRPORTS

17

ORIGIN COUNTRIES

2

INTERNATIONAL
AIRPORTS





U.S. REMAINS TOP DESTINATION GLOBALLY

#1

OVERALL

Top destination likely to be visited among international travelers (11-market average)

#1

DESTINATION

Most likely destination to visit in **Brazil, Canada, and Mexico**

#1

LONG HAUL DESTINATION

Highest-ranked long-haul destination in **France, Germany, Japan, and The UK**

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Travel Nevada in Action



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NEVADA

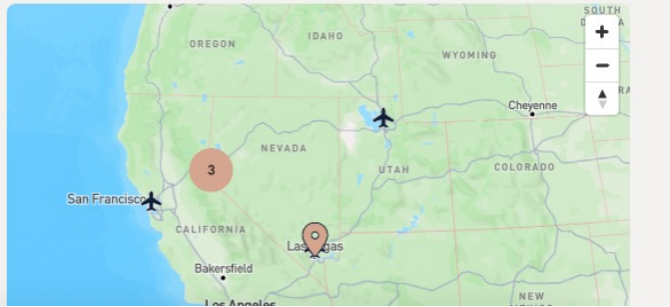
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Earn Miles when you book a flight or hotel.

Ends June 16, 2025. Terms apply.

BOOK NOW



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Go beyond the neon lights and explore the heart of Nevada. Book your flight or hotel in Nevada through AIR MILES® Travel to earn.

*Terms apply.

LEARN MORE



Get a little out there

Explore the desert hot spots like Hoover Dam and Valley of Fire or cruise the Extraterrestrial Highway for otherworldly sights.

Routes for every type of adventure

Nevada road trips are where memories are made. See ghost towns, Area 51, coveted scenic treasures, and more.



Bask in the Basque

Originally introduced to locals in the state's northern region, Basque cuisine is Nevada's signature fare.



A city with no last call

Expect late Las Vegas nights enjoying casinos and astonishing world-renowned stage shows.

BOOK NOW

Terms & Conditions



Viaja a Nevada Hasta -35%

Descubre Nevada: Una experiencia única en el Desierto

Reserve ahora

Nevada no es lo que imaginas, es mucho más... Ver más



Tú y 22 personas más

8 comentarios 1 vez compartido

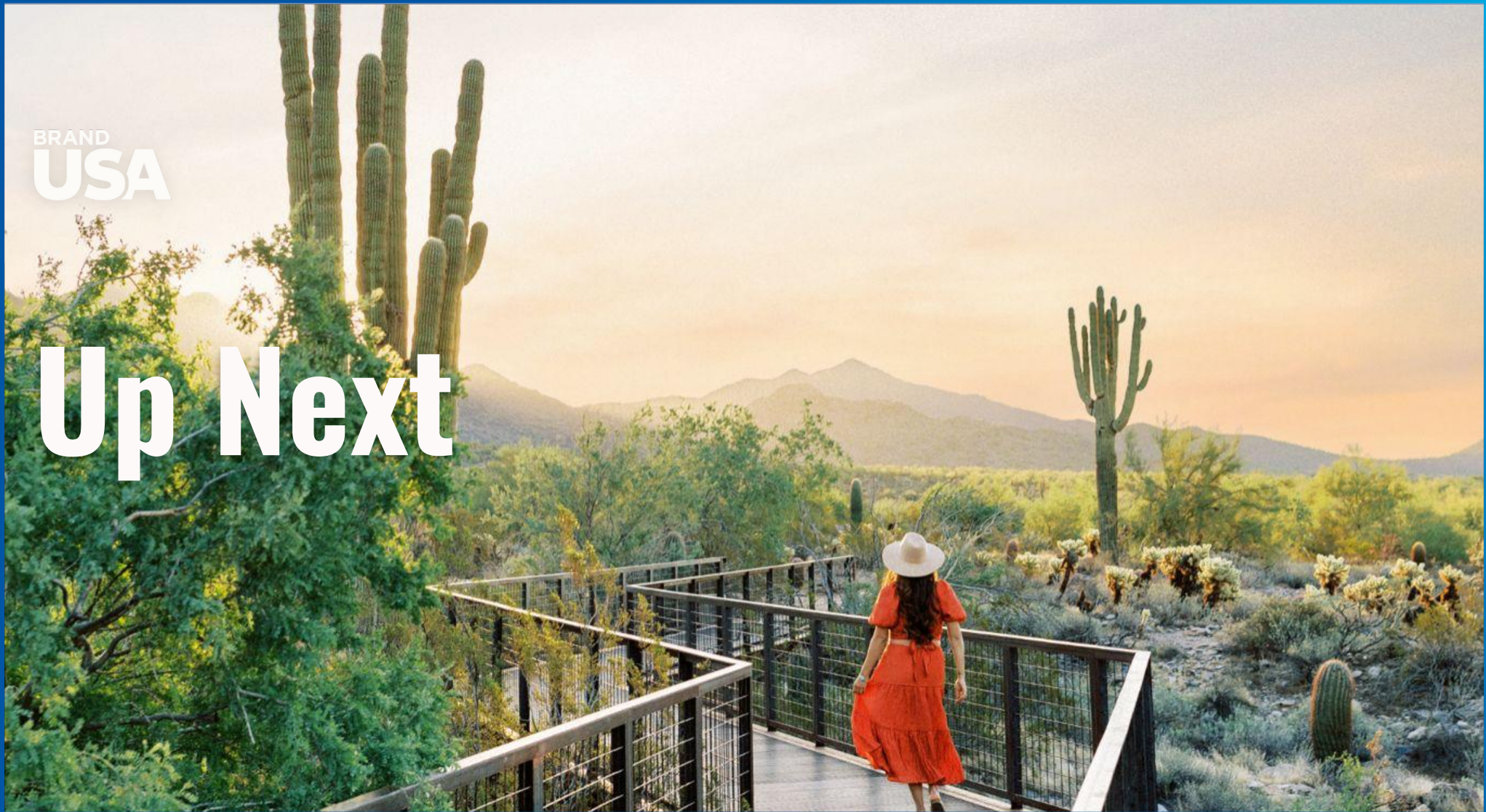
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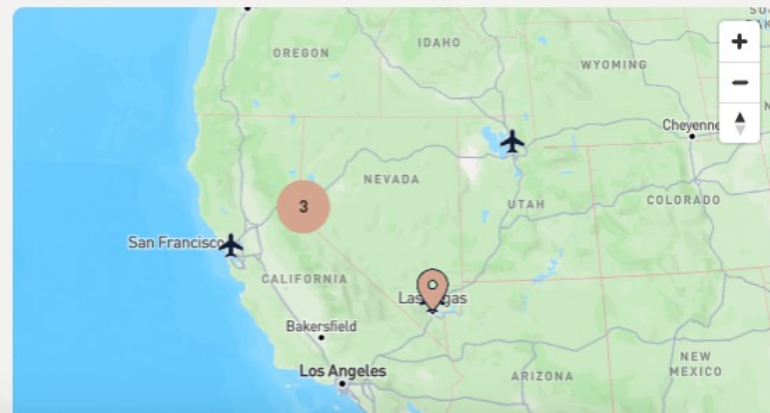
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ENCHANTING ADVENTURES & ENTERTAINMENT





NEVADA THE BOLD

CUSTOM OPPORTUNITIES

Brand USA, together with Travel Nevada, is creating custom campaign opportunities that engage audiences across diverse media channels and inspire travel intent at every stage of the journey. This collaboration leads feature destinations with one unified voice in key target markets, using a full-funnel approach to build awareness with international travelers and drive meaningful results for communities throughout Nevada.

TARGET AUDIENCE

Consumers

KEY BENEFITS

-  Strategically aligned with Brand USA's target audiences to reach high-value international travelers who are motivated by meaningful experiences and personal fulfillment.
-  Wider mention of top OTA media channels enables more strategic market activation—prioritizing platforms with the largest reach and engagement in markets with the highest travel potential.
-  Campaigns are integrated with Brand USA's America The Beautiful campaign, with creative and messaging alignment.

ACTIVATE

DRIVE THE JOURNEY

Campaigns that take travelers from consideration to booking. These full-funnel campaigns connect partners with ready-to-buy travelers across booking platforms, building on the awareness and interest already created upstream to drive real results.

CAMPAIGN DETAILS

IN-MARKET DATES

Fall 2026

DESTINATION SELECTION BY

August 15, 2026

PRODUCTION TIME

8-10 weeks prior to campaign start

CAMPAIGN LENGTH

45-60 days, varies by vendor

BRAND USA & TRAVEL NEVADA CUSTOM OPPORTUNITIES

CONSUMER WEBSITE PROMOTION & CONTENT								
Campaign Level	Native or Display Core Impressions	Number of Carousel Tiles	Carousel Impressions Per	Total Estimated Impressions*	Destination Landing Page Refresh or New	Number of Thematic Selections	Number of Thematic Article Features	Thematic Onsite Promotion
4	1M or 1.1M	N/A	N/A	1M or 1.1M	1	N/A	N/A	N/A

*Estimated Minimum Impressions based on Native and Carousel totals; vary by market and tactic

Linking Strategy:

- Native or display tactics drive to Destination Landing Page on VisitTheUSA.com

OPTIMIZED AUDIENCE CAMPAIGN							
Campaign Level	Native Impressions	Number of Carousel Unit Tiles	Carousel Impressions	Content Integration	Kayak Impressions	Booking.com Impressions	Total Estimated Impressions
State Opportunity	920,000	2	5,450,000 (2,720,000)	Custom Destination Landing Page	1,720,000	1,500,000	9,590,000
City/Region Opportunity	460,000	1	2,720,000	State Landing Page Search Tab	N/A	N/A	3,180,000

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THANK YOU

