



FY26

# BUSINESS PLAN



Lake Willoughby, Vermont



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**ABOUT THIS REPORT** Brand USA's FY26 business plan contains the organization's targets, activities, and resources for the fiscal year from October 1, 2025 - September 30, 2026.

# ABOUT BRAND USA

Brand USA drives legitimate inbound travel to the United States to strengthen the economy, bolster exports, and sustain quality jobs. As the authoritative voice of USA travel experiences, Brand USA showcases what makes America great as a travel destination through strategic advertising, always-on communications, focused engagement with leading sales and distribution networks, and clear information about visa and entry policies.

Brand USA works with communities and businesses throughout the United States to maximize the economic benefits of the international visitor economy. International travel to the United States generated \$226 billion in U.S. exports in 2023, contributing significantly to an overall \$2.3 trillion industry that employs nearly 10 million Americans.

# LETTER FROM CEO

In the fierce competition for high-spending global travelers, Brand USA's mission is clear: drive legitimate inbound travel to strengthen America's economy, bolster exports, and sustain quality jobs.

Our FY26 business plan positions us to win this global competition through focused deployment of resources and strategic interventions across the entire traveler journey from travel trade engagement to consumer marketing. This is a role that only Brand USA and its private industry partnerships can fill.

The foundation of our FY26 approach is *America The Beautiful*, a new, organization-wide platform designed for this moment. The campaign elements transcend media clutter by leveraging the enduring appeal of Americana and the world's most aspirational destinations to inspire global audiences. The platform's new AI-first digital hub will key in on how international travelers are increasingly discovering and planning trips through personalized and conversational tools.

Marquee moments over the next year will capture unprecedented global attention—the 2026 FIFA World Cup, America's 250th Anniversary, and the Route 66 Centennial. These events provide unique, extraordinary windows to showcase what makes America great as a travel destination and drive economic impact across the country.

This plan and everything we do is oriented toward generating outsized returns for the American people. Our data-driven market prioritization model allows us to focus resources where we can move the needle most effectively.

We believe we have the potential to deliver as much as \$3.75 billion in directly attributable U.S. travel and tourism export revenues in FY26, helping drive new federal tax receipts that reduce the budget deficit, sustain quality jobs, and contribute to overall GDP.

The comprehensive approach laid out in this plan—spanning global advertising, AI-enhanced digital experiences, travel trade engagement, industry stakeholder plug-ins, and strategic partnerships—ensures that when high-spending travelers dream of their next adventure, the USA rises to the top of their consideration set. We're building an ecosystem that connects that inspiration to booking, leveraging cutting-edge technology and deep market insights to win travelers that are highly sought after.

As the trusted unifier between public and private sectors, we stand ready to maximize America's competitive advantage in the global travel marketplace. The plan ahead is ambitious, data-driven, and designed for impact.

**Let's get to work.**



**FRED DIXON**

*President and Chief Executive Officer*

FY26

# MARKETING PLAN

*Dolly Sods Wilderness, West Virginia*

**Brand USA executes marketing and promotional efforts according to three fundamental considerations, now significantly evolved for FY26 to navigate a dynamic global landscape and rapidly changing traveler behaviors.**

- A comprehensive market prioritization model aligns resources with market potential and high-spending, persuadable audiences.
- In-depth research and continuous insights provide real-time understanding of evolving traveler behaviors, shaping overall campaign messaging and market-specific activities.
- Strategic interventions across the traveler journey create a surround-sound environment and convert consumer interest into traveler behavior. *America the Beautiful* will target high-value travelers through customized messaging, a targeted paid media strategy, and a reimagined digital hub for personalized planning. This will be complemented by “always-on” global communications and focused engagement with leading sales and distribution networks to ensure America receives prime shelf placement.

**Brand USA will make sure America doesn't just compete but win, capturing a disproportionate share of the high-yield market in a limited number of places where we can move the needle. This effort fills a gap that only Brand USA can address.**

# AMERICA THE BEAUTIFUL

## THE UNIFYING PLATFORM

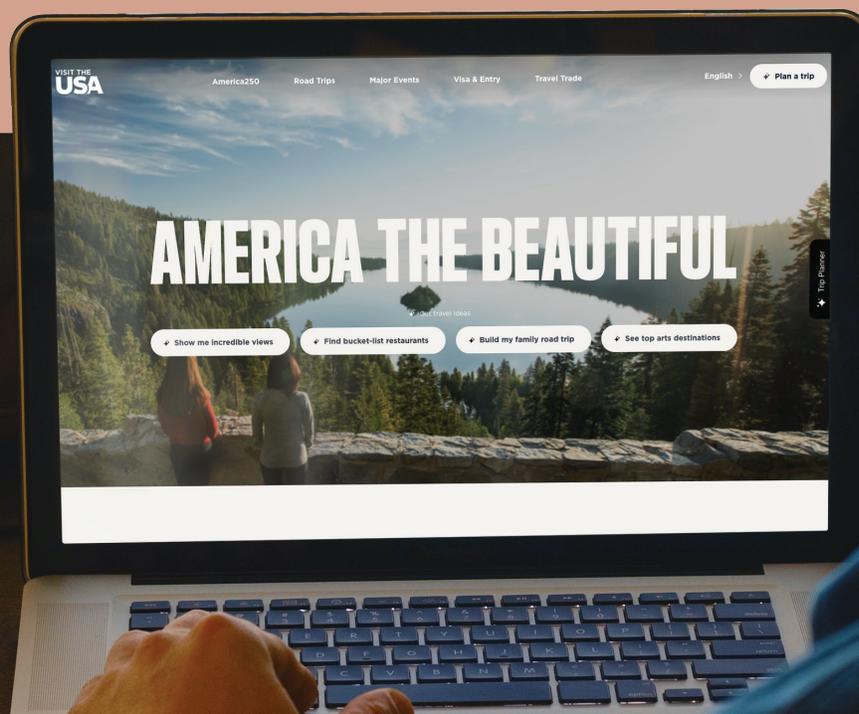
Brand USA's FY26 marketing activities are anchored by *America The Beautiful*, a new, organization-wide platform designed to meet the current moment in travel. *America The Beautiful* serves as a rallying cry for U.S. travel, directly leveraging marquee moments to create a powerful and relevant message.

The campaign is calibrated to drive direct economic impact and entice high-value travelers, transcending media clutter by using Americana and nostalgia to inspire, while capitalizing on iconic global events.

Brand USA's approach resonates emotionally and behaviorally with global audiences. Visitors come not just to passively see America, but for the unexpected moments and human encounters that leave lasting impressions. Travelers seek to “feel America”—from city energy to small-town warmth—craving authentic engagement with locals, cultures, and stories. The campaign's tone is characterized by optimism, confidence, energy, and humble pride that emphasizes openness and passion for connecting with visitors.

### THE CORE MESSAGE:

*“This country isn’t meant to be just visited, but to be felt.”*





# 72%

POSITIVE ADVERTISING RATING



Houma, Louisiana



Orlando, Florida



Seattle, Washington

## PROVEN IMPACT AND EFFECTIVENESS

Creative testing confirmed an overwhelmingly positive reception, with 72% rating the advertising positively.

### STRONG EMOTIONAL RESPONSE:



## AUDIENCES AND SEGMENTS

**Primary Audience:** Prospective travelers who are open to visiting, have yet to decide, and are more interested in the personal fulfillment of travel than media narratives.

**Amplified Audience (High-Value Travelers):** Individuals with both the interest and economic means to visit the United States. These travelers are drawn to exclusivity and social currency, motivated by once-in-a-lifetime experiences, live events, and product variety.

**Key Audience Segments:** Content is tailored to four segments reflecting specific travel motivations: outdoor, family, luxury, and arts and culture.

## MARQUEE MOMENTS BRING UNIQUE OPPORTUNITIES

The United States will host several significant global events in 2026. These are windows of time in which the country will garner an extraordinary amount of global attention that could influence consumer perceptions and generate more demand. They are important moments for the country and for the U.S. travel and tourism industry.

Brand USA will capitalize on these unique opportunities by highlighting American greatness and showcasing our nation's people and traditions; creating thematic content about the wide variety of U.S. travel experiences in and around host cities; and leveraging partnerships and interactive mapping to entice visitors to stay longer, spend more money, and visit additional destinations throughout the country.

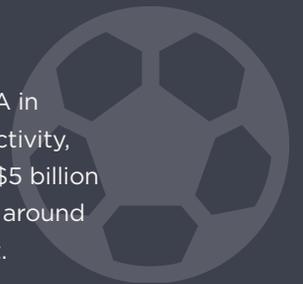
### AMERICA 250

The 250th anniversary of the Declaration of Independence represents a significant opportunity to highlight American legacy and local commemorations. Brand USA is creating a significant amount of America 250 content for an all-new consumer website that will integrate travel industry partners and using the moment for global earned media, amplifying a wide variety of U.S. travel experiences.



### 2026 WORLD CUP

The FIFA World Cup is the most significant focal point for global attention, with all eyes on the USA in summer of 2026. An expanded tournament, higher-capacity stadiums, greater international connectivity, and a more prominent brand will all help the United States eclipse the 3.5 million visiting fans and \$5 billion economic impact that Qatar saw in 2022. Destinations will be featured in editorial content themed around sporting events, aligning with Brand USA's content strategy and capitalizing on this major moment.



### ROUTE 66 CENTENNIAL

Road-trip experiences are a stand-out differentiator and a preferred trip type for the United States, reinforcing our position as a versatile destination with broad global appeal. The 100th anniversary of this quint-essential route across the USA is an opportunity to deliver this story in new and compelling ways, driving visitors to the eight states around Route 66 and celebrating the broader idea of American road trips.



As a trusted unifier between the public and private sectors, Brand USA is uniquely positioned to maximize the impact of these moments. We are working directly with the federal government, including serving on the White House FIFA World Cup Task Force, amplifying America 250's marketing efforts overseas, and collaborating with the U.S. Department of Transportation to promote their "Great American Road Trip."

# MARKET SELECTION

Brand USA’s marketing efforts for FY26 are guided by a comprehensive market selection and prioritization model developed by its in-house research team. This model provides a tiered framework that takes a surgical, data-driven approach to align market potential with feasibility.

## THE MODEL UTILIZES TWO DISTINCT SETS OF INDICATORS TO EVALUATE EACH MARKET

Broad, country-level indicators reflecting general conditions for overall outbound travel

- Economic strength
- Technology infrastructure
- Openness

U.S. inbound travel factors affecting each market’s connection with the USA

- Airlift
- Market access
- Travel spending

Brand USA prioritizes markets with large, high-spending, and persuadable travel audiences. The evaluation process also considers factors such as geopolitical resilience, economic stability, and visitation potential, while maintaining flexibility to adapt as global conditions evolve.

Finally, markets are categorized into two tiers. Tier 1 markets consist of those with significant upside for visitation and that have demonstrated resilience in the current landscape. The strategy for these markets is to focus resources on maximizing their potential for increased visitation and engagement. Tier 2 markets include Mexico and Canada. The strategy for these markets involves more targeted communications, given the sheer volume of visitors they contribute to the United States. This approach aims for efficient and impactful engagement tailored to their high-volume visitor profiles.

TIER 1 MARKETS			TIER 2 MARKETS	
 Argentina	 Germany	 South Korea	 Canada	
 Australia	 India	 UK	 Mexico	
 Brazil	 Ireland			
 France	 Japan			

Beyond these tiers, Brand USA will allocate up to 5% of its FY26 budget for additional markets for the purposes of long-term market development and as a hedge against major global shifts during the year that necessitate reallocation of resources.

# INTEGRATED MARKETING ECOSYSTEM

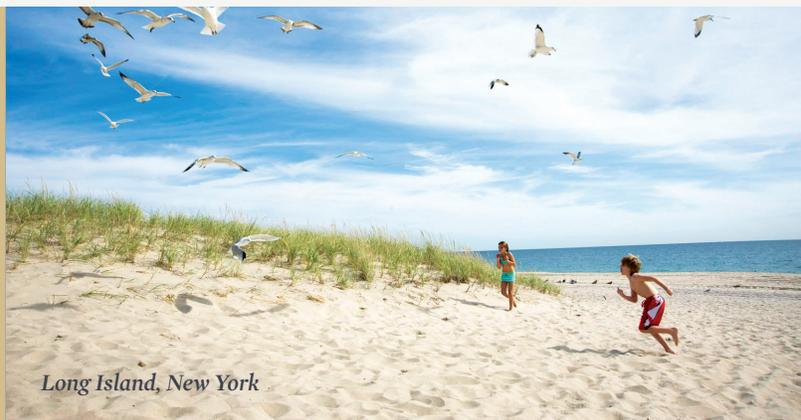
## BRAND AND AWARENESS BUILDING

### GLOBAL ADVERTISING AGENCY

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Brand marketing initiatives capture the imagination by weaving a unified tapestry of America's breathtaking landscapes, vibrant cities, and rich cultural heritage.

*The United States holds a distinct position as a modern destination uniquely blending urban vibrancy with rural charm, setting it apart from historic European competitors.*



### PAID MEDIA APPROACH

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Brand USA emphasizes upper-funnel activities for awareness and consideration while supporting the entire consumer journey. Primary channels include connected TV/over-the-top and online video across all markets, with secondary channels like paid social deployed based on market sentiment. Data-driven performance optimization occurs during key travel planning windows to maximize impact and efficiency.

## PR AND EARNED MEDIA

Brand USA employs an “always-on” strategy to proliferate positive storytelling and protect the organization’s reputation. This approach reaches consumers through trusted daily media and prompts strong U.S. travel considerations, moving them along the traveler journey while helping industry stakeholders reach new customers.

Brand USA drives strategic exposure across international markets through key travel, lifestyle, and trade publications. Efforts align with *America The Beautiful* storytelling pillars:

- **Marquee Moments**  
America 250, FIFA World Cup, Route 66 Centennial
- **Thematic Content**  
Wellness, Arts & Culture, Family Travel
- **New Openings and Route Launches**  
from international markets

Brand USA will continue to generate more than 4,500 stories annually, with over 17,000 partner mentions—including through the Visiting Journalist Program, which showcases the best of the USA.

## SOCIAL MEDIA AND CONTENT CREATORS

Collaborations with influential content creators deliver authentic, personal storytelling integrated with broader brand campaigns. These partnerships are optimized based on analytics and follower engagement, ensuring content resonates with target audiences while maintaining an authentic voice and perspective.



# DIGITAL EXPERIENCE AND ENGAGEMENT

## CENTRAL HUB

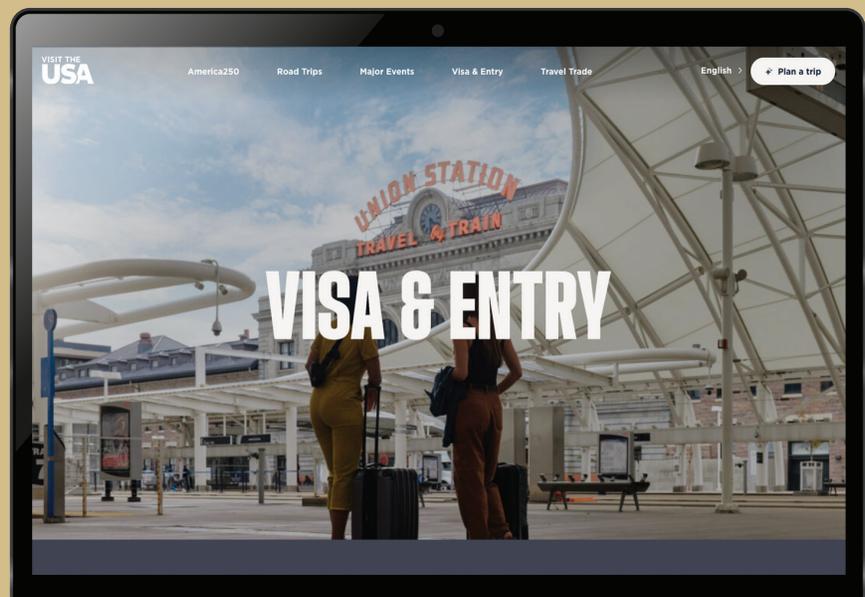
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Brand USA launched AmericaTheBeautiful.com as an all-new, brand-level platform designed to unify storytelling, elevate partner impact, and connect with consumers in a smarter, more resonant way. This platform is the central hub for all inspirational content and marketing efforts, building upon the success of the long-standing VisitTheUSA.com. Both VisitTheUSA.com and AmericaTheBeautiful.com URLs will point to this new online experience.

The reimaged website serves as a dynamic, campaign-aligned platform designed for both the consumer journey and partner collaboration. The site also features AI translations with a native linguist overview and interactive mapping to enhance connectivity and understanding and to drive dispersal beyond major cities.

### KEY FEATURES INCLUDE:

- An AI itinerary-planning tool for personalized exploration
- A “Places to Go” section spotlighting what’s new
- Hidden gems
- Signature experiences
- Thematic content around traveler passions aligned with major moments



## CONTENT STRATEGY

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*America The Beautiful* content is designed to drive awareness of experiences, simplify the planning process, and educate visitors for a more seamless travel experience. A multipronged messaging framework delivers inspiration at the top of the funnel, interest-based messaging for individual audience segments, informational content about entry and exit requirements, and partner-specific efforts focused on conversion and bookings. All content strategy and PR efforts align with the *America The Beautiful* framework.

## AI INTEGRATION AND PERSONALIZATION

AmericaTheBeautiful.com pioneers the use of artificial intelligence to transform how international travelers discover and plan their USA experiences. The integration of Mindtrip's AI technology enables dynamic, conversational trip planning that adapts to individual preferences and travel styles. Rather than navigating static pages or conducting traditional searches, visitors engage in natural dialogue that understands context and provides increasingly personalized recommendations.

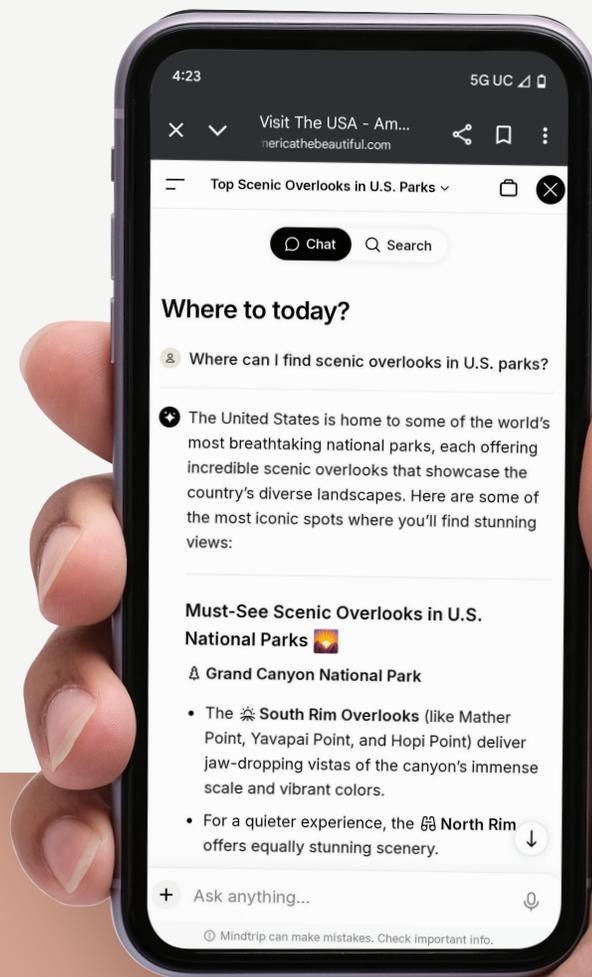
This future-forward website includes AI-driven translations that maintain cultural nuance across languages, contextual content recommendations based on browsing behavior, and custom prompts that appear throughout the site to inspire exploration of relevant experiences. This intelligent personalization ensures each site visitor receives a tailored journey that aligns with their interests, whether they're seeking outdoor adventures, family experiences, luxury escapes, or cultural immersion.

## DATA AND INSIGHTS GENERATION

First-party data from AI interactions and digital engagement provides continuous insights into traveler preferences and behaviors. This data informs content creation, partner opportunities, and strategic adjustments to maximize impact across all marketing activities.

Brand USA will analyze conversation patterns and frequently asked questions to identify content gaps and emerging travel interests.

*Industry stakeholders also benefit from real-time insights on which destinations and experiences generate the most interest during crucial decision-making moments.*



# INTEGRATED MARKETING ECOSYSTEM

## DISTRIBUTION AND CONVERSION

### TRAVEL TRADE ENGAGEMENT

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Many international travelers rely heavily on the travel trade and online travel agencies, particularly for overseas and long-haul travel. These channels provide added peace of mind, destination expertise, perceived value, and a one-stop shop for vacation needs—especially crucial when consumers seek reassurance. Brand USA’s global network of in-market representatives drives sales of U.S. travel experiences through workshops, toolkits, contests, an online training program, and a variety of other ways of activating tour operators and travel agencies in-market.

### TOUR OPERATOR AND OTA PARTNERSHIPS

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Brand USA collaborates with key tour operators on cooperative marketing campaigns to drive business to a wide variety of destinations and experiences throughout the USA. These tactical campaigns integrate platforms like Expedia, Booking, Kayak, and Agoda to convert inspiration into bookings.



## **B-TO-B FACILITATION**

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Brand USA provides U.S. destinations and businesses with direct access to global travel buyers through signature events and sales missions. These missions connect industry stakeholders with travel trade professionals, commercial decision makers, and valuable media channels.

Brand USA Travel Week UK & Europe has become the U.S. travel industry's flagship European marketplace and will continue to innovate in thought leadership and market access. New in FY26 is the expansion of the Travel Week franchise, as the former India mission adds a C-Suite immersion and the South America mission debuts a new format in Rio de Janeiro.

These flagship events will be complemented by regional missions in Australia, Canada, Japan, Mexico, South Korea, and Southeast Asia, as well as thematic travel trade shows in luxury (ILTM Cannes) and business meetings and events (IMEX Frankfurt).

## **TRAVEL TRADE ACTIVATION AND PRODUCT INNOVATION**

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Brand USA activates the global travel trade through immersive experiences and innovative product development, expanding both seller capability and availability of bookable U.S. travel products.

Product development refers to increasing the breadth of travel products available in a market. Key Brand USA programs include Road Trips USA, which curates and distributes multi-state themed itineraries for inbound receptive operators and international tour operators. Destination Immersions are large-scale, collaborative tours developed in partnership with airlines and destinations. These programs bring groups of qualified travel agents to experience multiple destinations through parallel, curated itineraries. In addition, Product Immersions are smaller, high-impact tours designed for product managers and decision-makers at tour operators. They offer focused, in-depth exposure to specific products or regions with strong potential for integration into future programs.



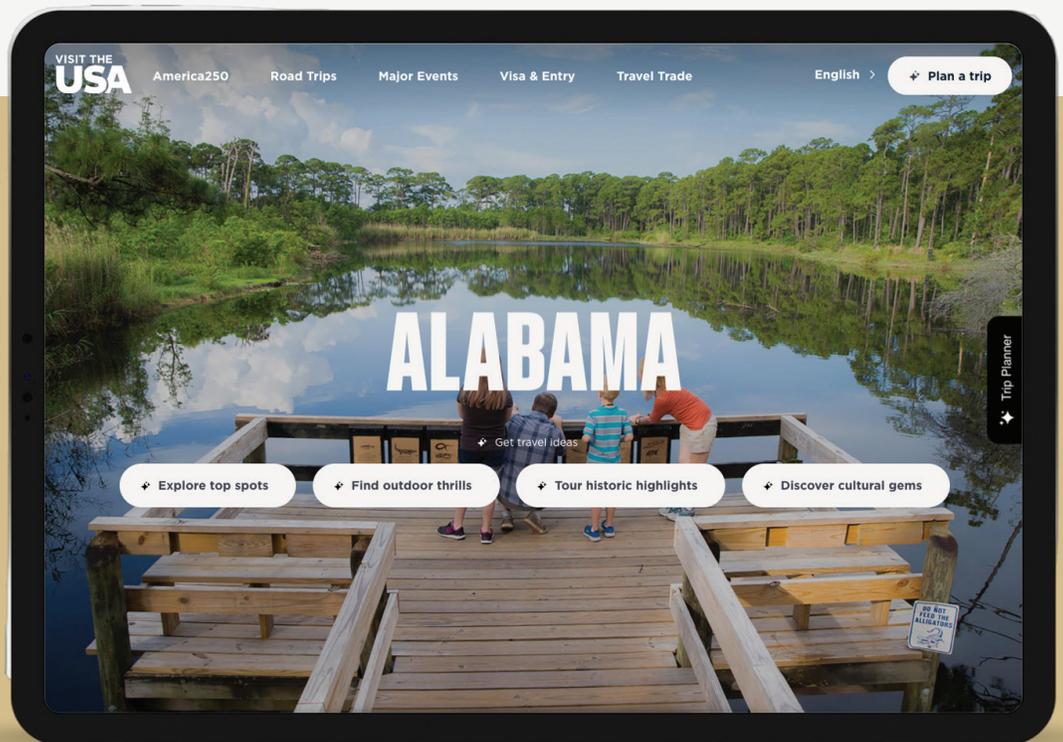
# PARTNER INTEGRATION

Brand USA's partner integration framework provides multiple pathways for stakeholders to reach international travelers, serving as the connective thread that weaves together and amplifies wide-ranging U.S. travel experiences through *America The Beautiful*.

**Owned Channel Integration:** Partners feature prominently on AmericaTheBeautiful.com through destination spotlights, thematic content aligned with traveler passions, and customized media amplification.

## MULTI-MARKET CAMPAIGNS

- **Optimized Audience Campaigns:** Full-funnel, direct-to-consumer programs are deployed during key planning windows, delivering partner-specific KPIs including reach, engagement, and attributable bookings. These data-driven campaigns now drive traffic directly to AmericaTheBeautiful.com and feature an updated mix of booking partners (Expedia, Booking, Kayak, Agoda) with Tourism Economics insights.
- **Global Communications:** Partners collaborate through editorial content submission for global press releases, hosting visiting journalists, and participating in signature events like Travel Week India.



# MARKET-SPECIFIC PROGRAMS

- **Europe:** Hays Travel, Travelbag (UK); CANUSA (Germany); Voyage Privé (France - new luxury program)
- **APAC:** Helloworld (Australia); Hindustan Times (India)
- **Americas:** Travelweek Canada, Air Miles Loyalty Program (Canada); Price Travel (Mexico)

# MULTI-YEAR STRATEGIC INITIATIVES

## ARTIFICIAL INTELLIGENCE

For the United States to win the competition for high-spending global travelers into the future, it is imperative for the U.S. travel industry to embrace the transformative power of artificial intelligence. Brand USA's AI strategy encompasses three pillars designed to enhance competitiveness and adapt to the rapidly evolving digital travel landscape:

**Operational Excellence:** Brand USA harnesses AI internally for data-driven decision-making and operational efficiency. AI-powered analytics generate valuable first-party data from consumer interactions, enabling gap analysis to identify unmet traveler needs, and reveal emerging trends through pattern recognition.

**Industry Capacity Building:** As a leader in destination marketing, Brand USA helps U.S. travel industry stakeholders navigate the AI transformation. This includes educating partners on AI adoption strategies, sharing insights from consumer AI interactions to inform product development, and ensuring partners understand how to optimize their content for AI discovery to enhance their international competitiveness.



**Enhanced Discovery and Booking for Global Audiences:** Brand USA makes the United States more accessible and bookable for international consumers, travel trade professionals, and business event planners through AI-enabled experiences. Brand USA is preparing for an AI-agent future by structuring destination content for optimal AI parsing, ensuring U.S. experiences are prominently featured when AI assistants make travel recommendations or complete bookings on behalf of users.

## BUSINESS EVENTS

The meetings and events industry, often referred to as the MICE sector (meetings, incentives, conferences, and exhibitions), has a significant economic impact on local economies. Large, organized groups drive outsized demand for hospitality services and local businesses. The rise in recent years of blended business and leisure travel (“bleisure”) provides additional impetus for destinations to target these high-impact events.

While Brand USA primarily targets the much larger and more diffuse leisure market, there may be an emergent role in meetings and events travel. For example, Brand USA organizes the USA Pavilion at IMEX Frankfurt, Germany, where the global meetings, events, and incentive travel industry comes together for the largest show of its kind in Europe. This collaboration allows more U.S. destinations to connect with thousands of global meeting planners and attract their business. Brand USA also connects industry stakeholders with overseas business event planners throughout the year, supports national efforts to host major events, and communicates U.S. visa policies for organized groups. Brand USA will continue to refine a value proposition for travel industry stakeholders in the MICE space.



FY26

# ECONOMIC IMPACT

*St. Pete Clearwater, Florida*

Drive

**\$3.75 BILLION**

in U.S. travel and tourism export revenues, representing an aggregate

**25:1 RETURN**

on investment and

Generating at least

**\$580 MILLION**

in new federal tax receipts, reducing the federal budget deficit

Supporting more than

**47,000**

additional American jobs

Generating a total economic output of

**\$8 BILLION**

These results will be independently calculated on official data from the Department of Commerce by a third-party assessor. This best-in-class approach uses a transparent econometric analysis that is validated and refined by market surveys and mobile device tracking.

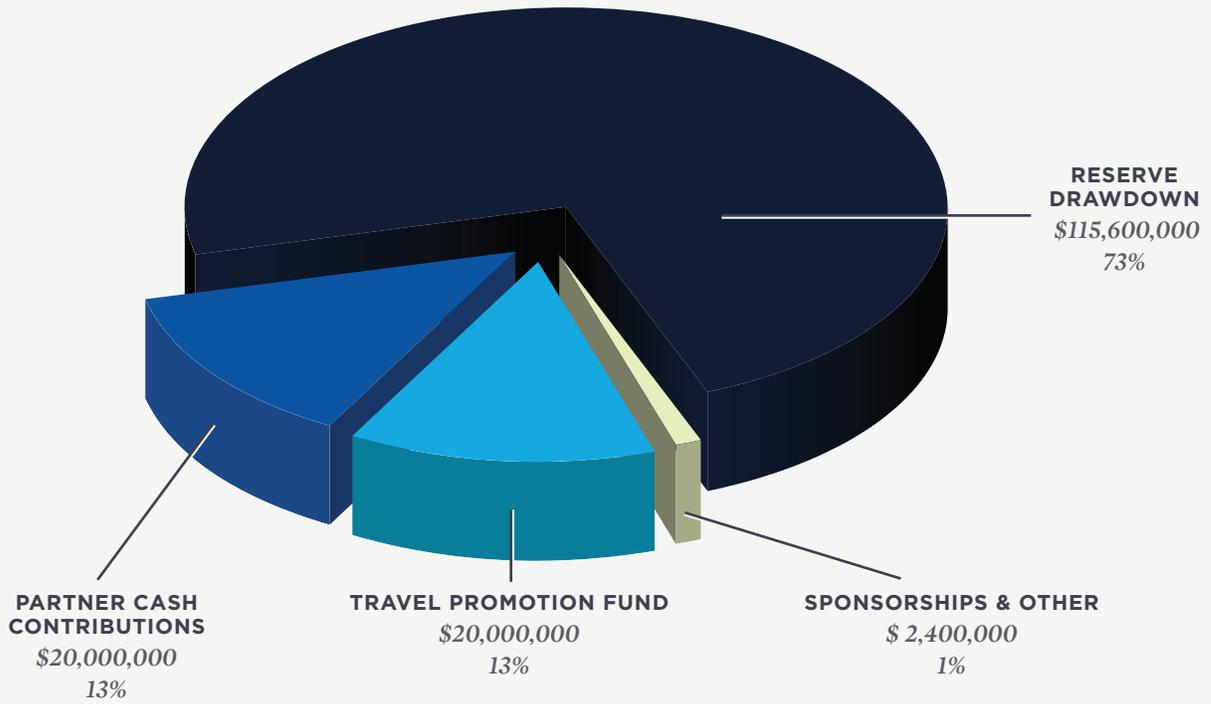
FY26

# BUDGET

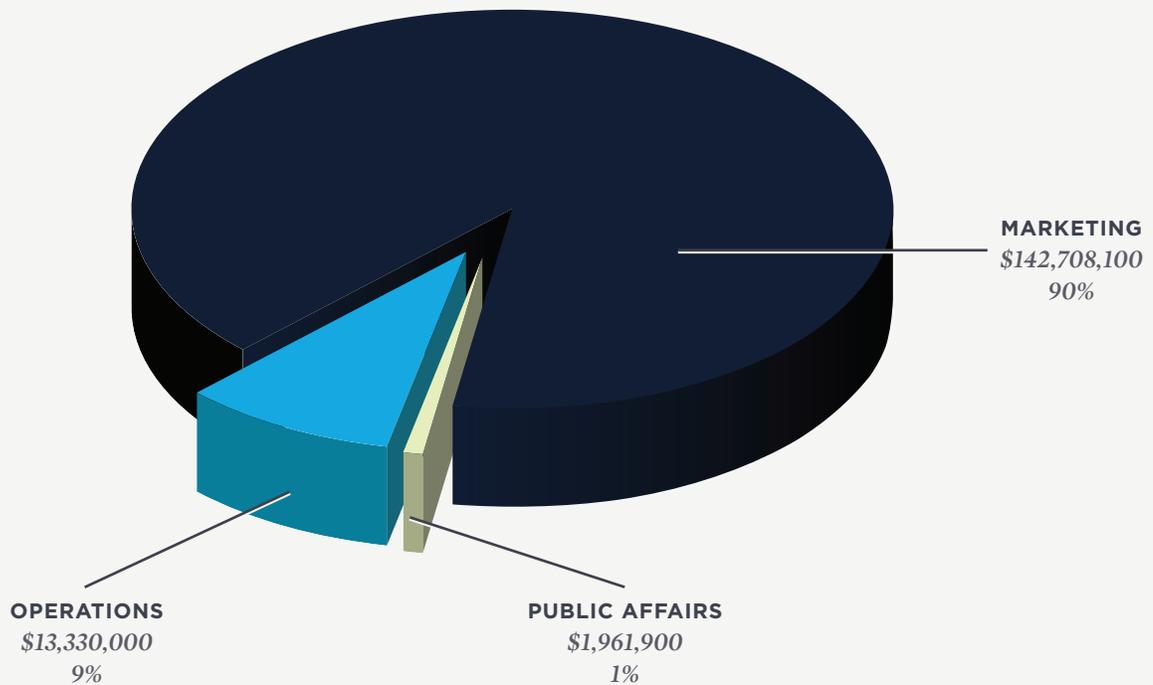


*Canyonlands National Park, Utah*

# TOPLINE REVENUE BUDGET



# TOPLINE EXPENSE BUDGET



# PROSPECTIVE EXPENDITURES ABOVE \$450,000\*

VENDORS	DESCRIPTION	CONTRACT RANGE
Amsterdam	2026 European Travel Week Venue	\$700,000 - \$800,000
ARM Digital	Digital Media Campaign	\$500,000 - \$600,000
Avia Representatives - Japan	Japan Trade Representation and Public Relations	\$750,000 - \$1,000,000
Avia Representatives - SE Asia	Southeast Asia Trade Representation and Public Relations	\$450,000 - \$600,000
Big Village	Global Research	\$450,000 - \$900,000
Brainlabs	Digital Media Campaign	\$600,000 - \$750,000
Edelman Korea	Korean Trade Representation and Public Relations	\$800,000 - \$1,000,000
Edelman Public Relations	Global Social Media and Public Relations	\$1,500,000 - \$2,000,000
etc.venues County Hall	2025 European Travel Week Venue	\$600,000 - \$700,000
Gate 7	Australia Trade Representation and Public Relations	\$800,000 - \$1,000,000
Insomniac Designs	Digital Development	\$450,000 - \$600,000
Interamerican Network	Brazil Trade Representation and Public Relations	\$600,000 - \$750,000
Interface Tourism Spain	Spain Trade Representation and Public Relations	\$500,000 - \$700,000
JCDecaux	Out of Home Media	\$450,000
Lieb Management	Germany, Switzerland, and Austria Trade Representation and Public Relations	\$600,000 - \$900,000
Miles Partnership	Partner Programming and Digital Development	\$2,500,000 - \$3,000,000
MMGY Global	UK, Ireland, France, and Italy Trade Representation and Public Relations	\$2,500,000 - \$3,500,000
R&R Partners	Creative and Global Media Planning and Buying Services	\$4,000,000 - \$6,000,000
R&R Partners	Global Multimedia Advertising Campaign	\$16,000,000
Sales Internacional	Mexico Trade Representation	\$450,000 - \$600,000
Sartha Global Marketing	India Trade Representation and Public Relations	\$500,000 - \$750,000
Televisa	Multi-Media Advertising	\$870,000

\* Note: The prospective budget Brand USA develops in advance of the fiscal year represents forecast expenses in broad categories. At the time the budget is submitted to the Department of Commerce, some budgeted expenditures correspond to specific vendors or RFPs in process, while others may be predictable based on experience. Where there is no specific contract in place, we include an estimate or range based on prior years or budgeted figures. However, the nature of destination marketing dictates Brand USA does not know in advance the majority of the specific vendor-deployments that will be made throughout the year, even if topline budget levels are set by market, channel, etc. Each year, the annual report we produce against the prior fiscal year provides an in-depth accounting of our activities, expenditures, and results.

# SENIOR LEADERSHIP



**FRED DIXON**  
*President and Chief Executive Officer*



**MONICA LOPEZ**  
*Chief of Staff and Culture*



**DONALD F. RICHARDSON, CPA**  
*Chief Financial Officer*



**AARON WODIN-SCHWARTZ**  
*Chief Public Affairs Officer*



**ANGIE BRIGGS**  
*Senior Vice President, Industry Partnerships and Engagement and Chief Development Officer*



**LEAH CHANDLER, CDME**  
*Chief Marketing Officer*



**JAKE CONTE**  
*Senior Vice President, General Council*



**CHRIS HEYWOOD**  
*Senior Vice President, Public Relations and Chief Communications Officer*



**JANETTE ROUSH**  
*Senior Vice President, Innovation and Chief AI Officer*



**MALCOLM SMITH**  
*Senior Vice President, Global Markets and Chief Trade and Product Development Officer*

# CONNECT WITH US

## COMPANY INFORMATION

 [TheBrandUSA.com](https://TheBrandUSA.com)

 [Facebook.com/TheBrandUSA](https://Facebook.com/TheBrandUSA)

 [Linkedin.com/Company/BrandUSA](https://Linkedin.com/Company/BrandUSA)

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## EXCEPTIONAL AND UNEXPECTED TRAVEL EXPERIENCES

 [VisitTheUSA.com](https://VisitTheUSA.com)

 [VisitTheUSA](https://TikTok.com/VisitTheUSA)

 [Facebook.com/VisitTheUSA](https://Facebook.com/VisitTheUSA)

 [YouTube.com/VisitTheUSA](https://YouTube.com/VisitTheUSA)

 [@VisitTheUSA](https://Instagram.com/VisitTheUSA)