

A wide-angle, high-angle photograph of a river winding through a deep, layered canyon. The rock walls are reddish-brown and show distinct horizontal strata. The river is a deep blue-green color. In the foreground, a person wearing a green hat and a dark tank top is sitting on a rock ledge, looking out over the canyon. The sky is bright blue with scattered white clouds.

BRAND
USA

MARKET INTELLIGENCE UNPACKED

Brand USA Research Webinar

December 2025

PRESENTERS



Chelsea Benitez

Senior Director,
Research & Analytics



Jonas Onkelinx

Senior Manager,
Research & Insights

What We'll Cover Today:

- **U.S. Visitation Snapshot:**
An overview of how inbound travel is performing this year and what we expect for the year ahead.
- **Airlift & Access:**
Key updates on airline capacity and what they mean for international travel.
- **Market Intelligence:**
An in-depth look at traveler motivations, past behavior, and future demand.

A wide-angle landscape photograph capturing a sunset over a valley. The sky is filled with large, billowing clouds in shades of orange, pink, and blue. Below the horizon, a river winds through a valley with rolling hills. In the foreground, two people are standing on a rocky outcrop, looking out over the scene. The overall mood is serene and majestic.

BRAND
USA

UNITED STATES VISITATION SNAPSHOT

YEAR-TO-DATE ARRIVALS (JAN-SEP) ARE DOWN 5%

51.2 million arrivals YTD is 2.9 million below Jan-Sep 2024



+10%

1.2 MILLION MORE
MEXICAN VISITORS



-22%

3.5 MILLION FEWER
CANADIAN VISITORS



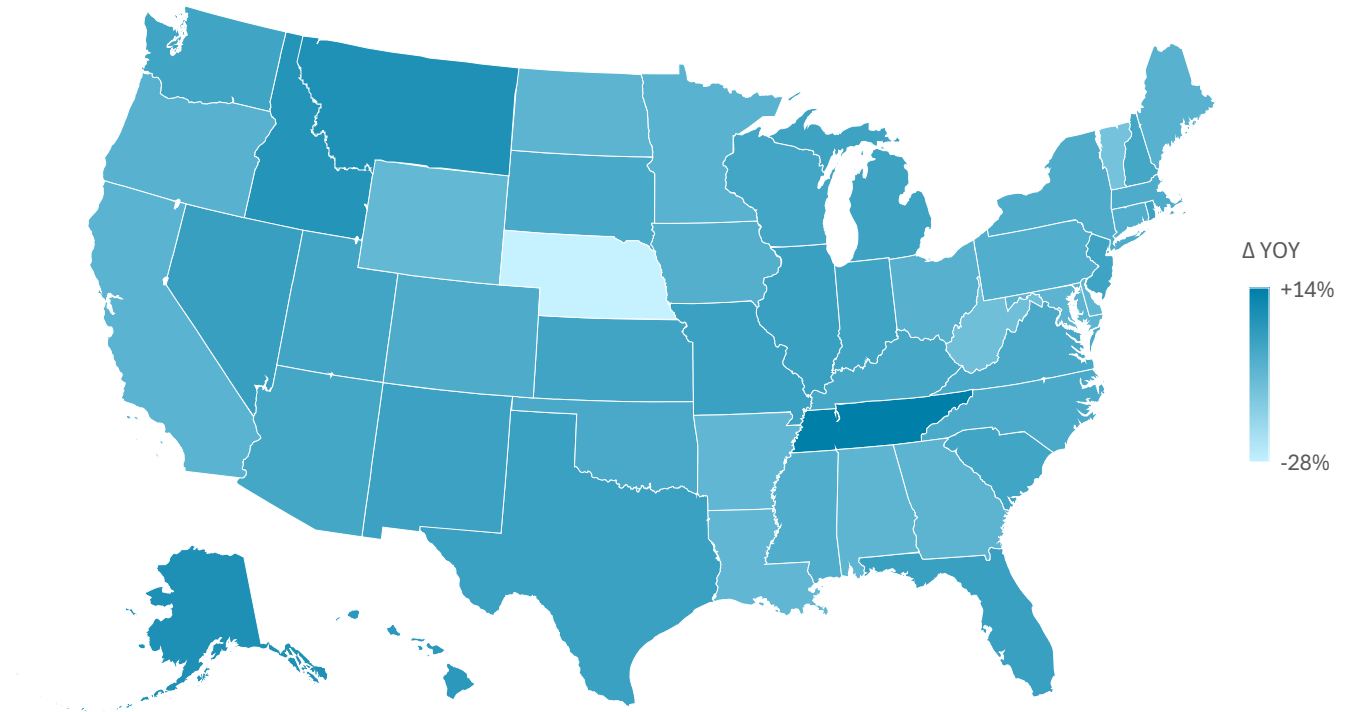
-2%

640K FEWER
OVERSEAS VISITORS

STATE LEVEL VISITATION TRENDS

Overseas Arrivals Growth (First Intended Address)

- Fastest growth in Puerto Rico (+26%)
- Tennessee is the fastest growing state (+14%)
- 18 states and territories surpassed 2024 arrivals (Jan-Oct)
- Top 5 by volume: FL, NY, CA, TX, HI
- Top 15 remained unchanged
- CO, MI, AZ, TN, CT, PR, ME, and WY rank higher than in 2024





2025 YTD OVERSEAS ARRIVALS

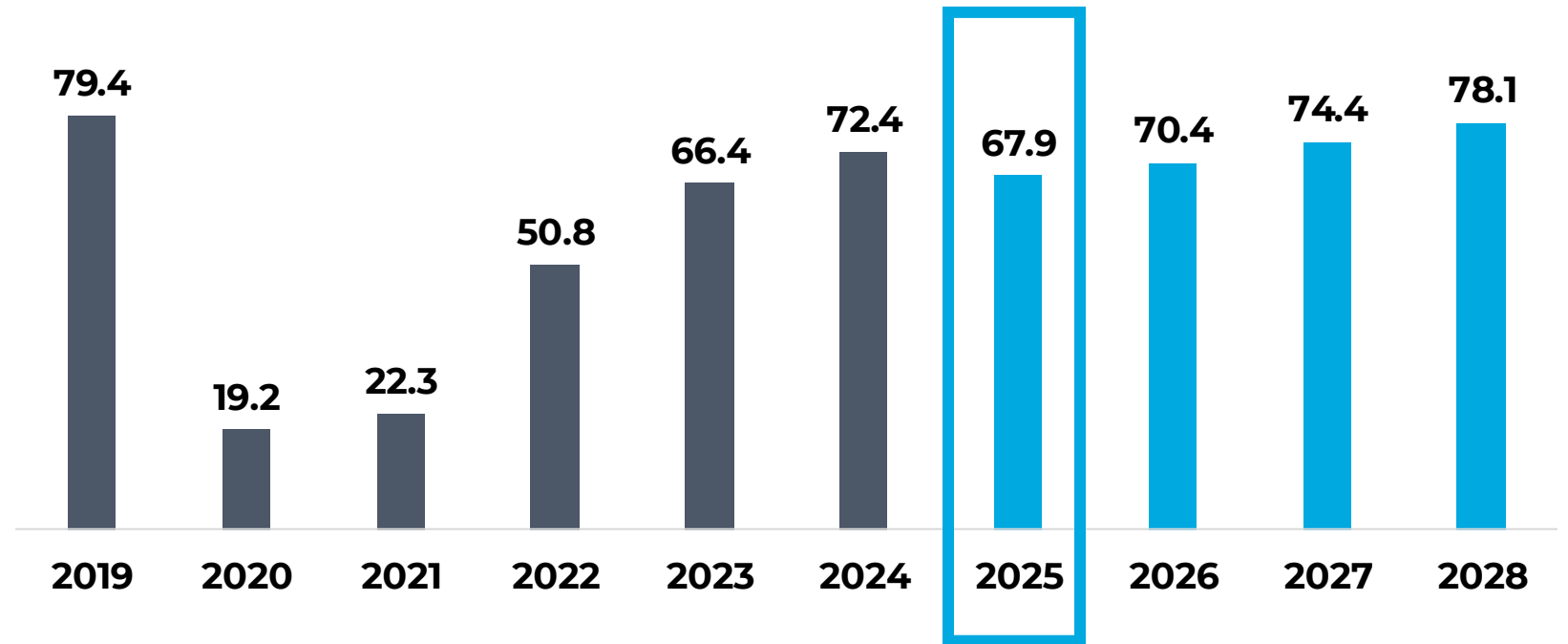
January through November overseas arrivals are down 3% year-over-year

Jan-Nov	Arrivals	YOY Change
United Kingdom	3,738,962	+1%
India	1,916,256	-5%
Japan	1,786,671	+6%
Brazil	1,689,292	+0%
Germany	1,635,390	-12%
South Korea	1,486,047	-5%
France	1,458,336	-7%
China	1,448,667	-3%
Italy	1,064,835	+5%
Colombia	956,989	+3%
Other Overseas	13,899,705	-3%
Total Overseas	31,081,150	-3%

U.S. INTERNATIONAL VISITATION FORECAST

Tourism Economics forecasts 67.9 million inbound international visitors in 2025, -6% from 2024.

After early-year declines, the outlook has improved since March, with more than 2 million visitors added back to the forecast.



YEAR-TO-DATE TRAVEL & TOURISM SPENDING (JAN-SEP)

+1%

INCREASE VS. 2024

\$188B

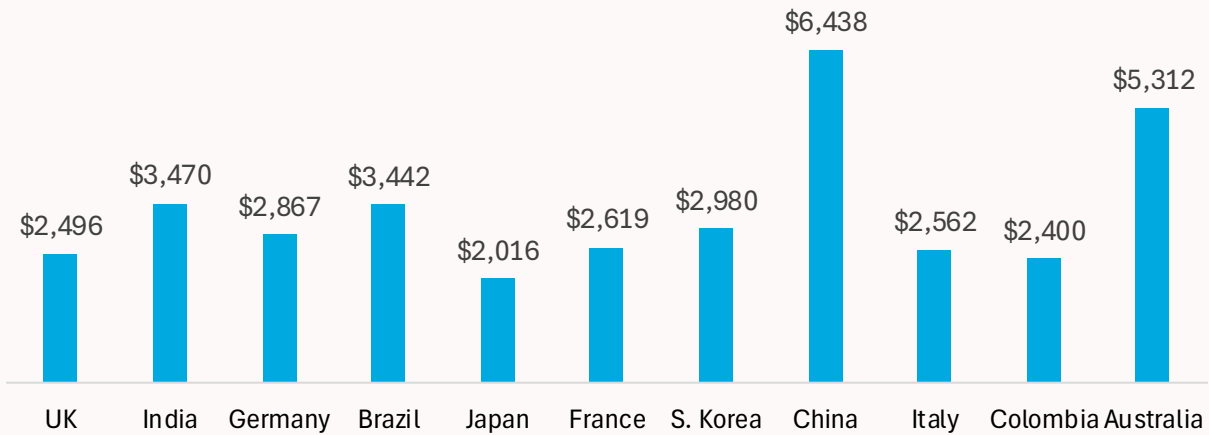
TOTAL SPENDING
THROUGH SEPTEMBER

\$689M

AVERAGE DAILY SPENDING

SPEND PER LEISURE TRAVELER

Spending excluding airfare, top Overseas Markets, 2024



BRAND
USA

AIRLIFT & ACCESS



RECORD USA NON-STOP SEAT CAPACITY & CONNECTIVITY

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

268

ORIGIN AIRPORTS

104

ORIGIN COUNTRIES

161M

NON-STOP SEATS



BRAND
USA

KEY FINDINGS: VISITATION & AIRLIFT

KEY FINDINGS

Visitation & Airlift

YTD Visitation

- Overseas visitation outperforms North America
- 8 top 20 markets are up YOY
- Argentina (#13) is the fastest growing market (+15%)
- 34 top 100 markets surpassed 2019 levels
- Record visitation from 21 markets, including Colombia (#9) and Italy (#10)
- Forecast: +4% in 2026 and +6% in 2027

Airlift

- Record inbound capacity
- Sustained growth in 2026
- 54 new routes launching in 2026

BRAND
USA

MARKET INTELLIGENCE



METHODOLOGY

Annual Brand USA Market Intelligence
Study on international travel behaviors,
motivations, and destination perceptions.

- **Sample:** ~1,000 active leisure travelers per market across 18 international markets (n=18,115)
- **Fielding Dates:** March 01 – June 25, 2025
- **Markets Surveyed:**

APAC	Europe	North America	South America
Australia	France	Canada	Argentina
China	Germany	Mexico	Brazil
India	Ireland		Chile
Japan	Italy		Colombia
S. Korea	Netherlands		
	Spain		
	U.K.		



WHAT DRIVES DESTINATION CHOICE?

RELAXATION AND LEARNING SHAPE DESTINATION CHOICES

Travelers prioritize rest, cultural learning, and unique attractions when choosing destinations placing less emphasis on staying within familiar comfort zones.



REST & RELAXATION



**LEARNING ABOUT
OTHER CULTURES**



UNIQUE ATTRACTIONS

CULTURE, CLEANLINESS, AND CLIMATE SHAPE TRAVEL PREFERENCES

Destination decisions are rooted in cultural appeal, cleanliness, and climate — supported by interest in scenery, iconic attractions, and affordability.



LOCAL CULTURE



CLEANLINESS



CLIMATE & WEATHER

SAFETY, CLEANLINESS, AND COST ARE THE MOST DISCOURAGING FACTORS FOR TRAVELERS

Travelers are most discouraged by concerns around personal safety, destination cleanliness, and high prices—highlighting how foundational comfort and confidence are when choosing where to travel.



**PERSONAL SAFETY
CONCERNS**



UNCLEANLINESS



HIGH PRICES



RECENT TRAVEL BEHAVIOR

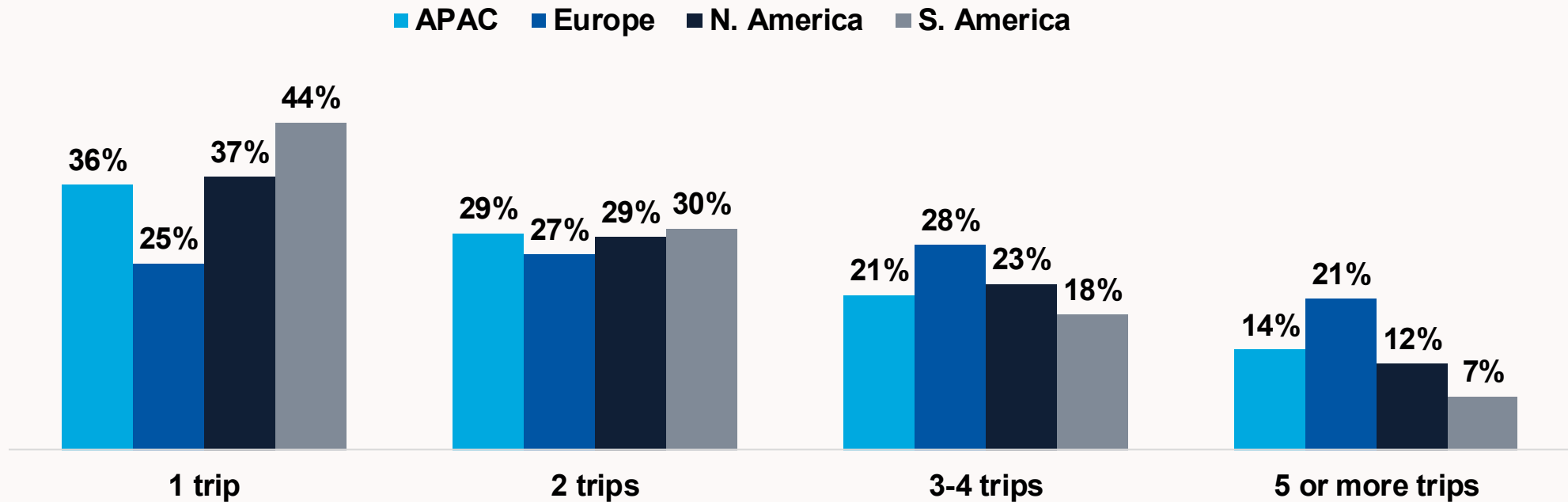
RECENT TRAVEL PATTERNS REVEAL STRONG GLOBAL MOBILITY — BUT WITH MEANINGFUL REGIONAL DIFFERENCES THAT SHAPE HOW FAR, HOW OFTEN, AND WHY TRAVELERS EXPLORE INTERNATIONALLY.



LEISURE TRIP FREQUENCY DIFFERS ACROSS REGIONS

International trip frequency varies across regions, with Europeans traveling more often and South Americans tending toward fewer long-haul trips.

Number of International Overnight Leisure Trips in the Past Two Years



THE UNITED STATES WAS THE MOST VISITED INTERNATIONAL DESTINATION GLOBALLY

Among survey respondents, the United States was the most visited international destination in the past two years—ranking #1 in APAC, North America, and South America, and as the top long-haul choice in Europe.

Rank	Total Respondents	APAC	Europe	N. America	S. America
1	United States	United States	Spain	United States	United States
2	Spain	Japan	France	Spain	Spain
3	France	France	Italy	UK	Brazil
4	Italy	Singapore	United States	France	Argentina
5	UK	UK	UK	Mexico	France
6	Germany	Thailand	Greece	Italy	Italy
7	Japan	Italy	Germany	Canada	Mexico
8	Portugal	Germany	Portugal	Germany	Portugal
9	Greece	Australia	Turkey	Japan	Chile
10	Canada	Hong Kong	Canada	Colombia	Peru

Q: What countries have you visited during your international overnight leisure trip(s) you have taken since April 2023?

Base: Total respondents, n=18,115 Source: Brand USA 2025 Market Intelligence Survey

JOY, RELAXATION, AND CONNECTION DRIVE TRAVEL MOTIVATIONS

Travelers are primarily motivated by the desire to have fun, unwind, and create meaningful memories with loved ones—highlighting the emotional value at the heart of international leisure travel.



**TREAT MYSELF &
HAVE FUN**



**RELAX, REDUCE
STRESS & RECHARGE**



**CREATE MEMORIES WITH
MY LOVED ONES**



LOOKING AHEAD TO PLANNED TRAVEL

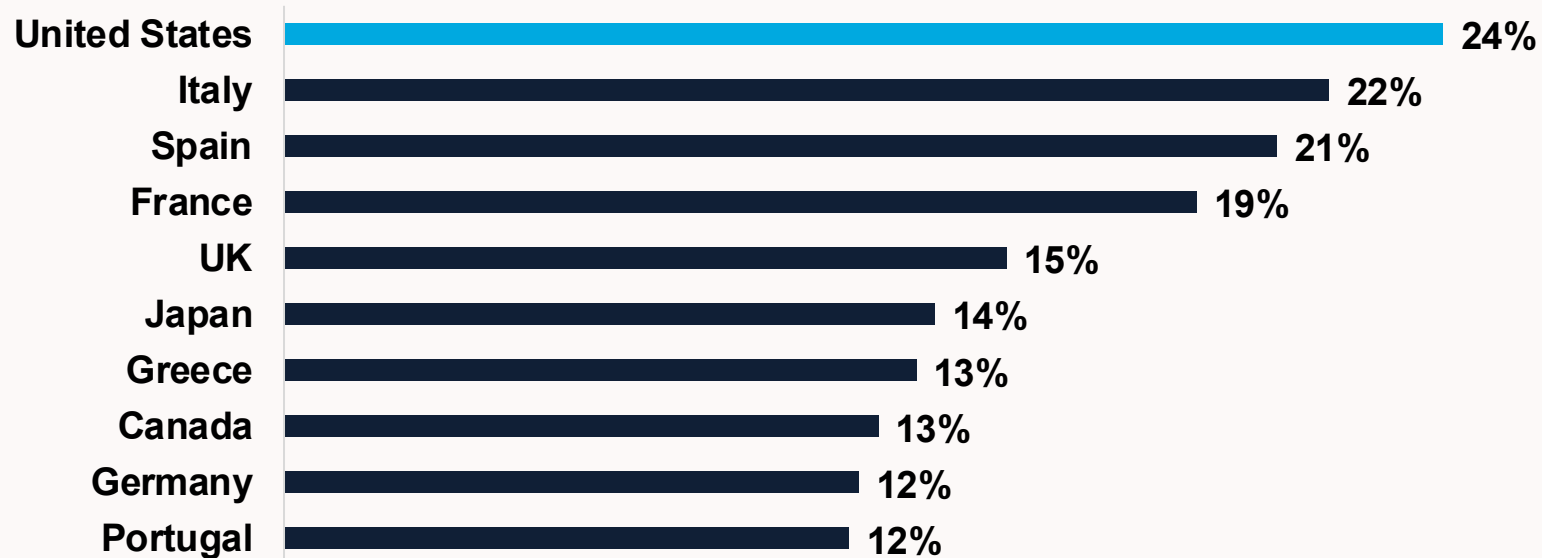
**TRAVELERS PLAN MEANINGFUL, MULTI-STOP TRIPS
WITH PARTNERS AND FAMILIES — WITH THE
U.S. EMERGING AS A LEADING DESTINATION
FOR THESE EXPERIENCES.**



THE UNITED STATES LEADS GLOBAL TRAVEL INTENT FOR THE NEXT YEAR

Travelers worldwide are most likely to choose the United States for an international leisure trip in the next 12 months—reinforcing strong repeat-travel potential for the U.S.

Countries Most Likely to Visit in the Next 12 Months



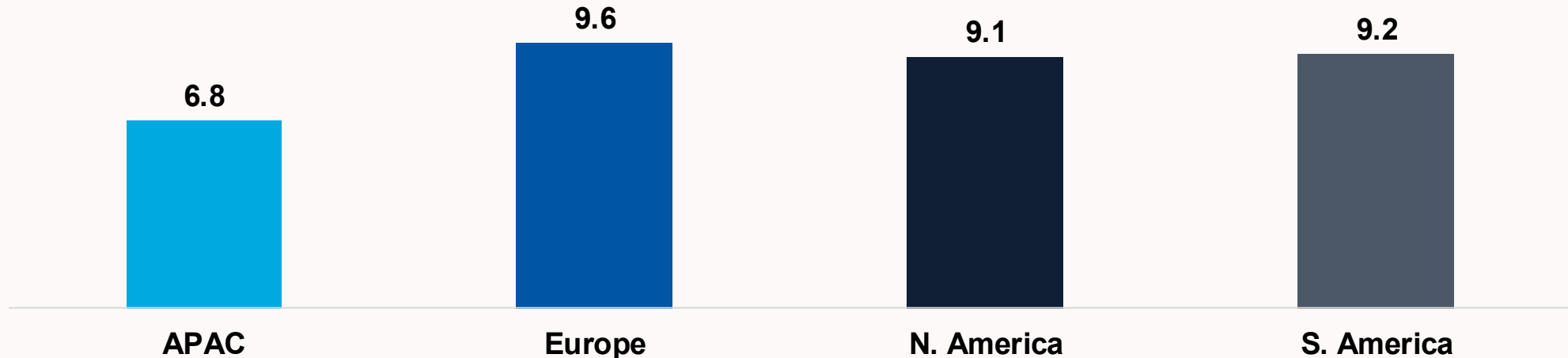
Q: Which countries will/would you MOST like to visit on an intercontinental overnight leisure trip in the next 12 months?

Base: Total respondents, n=18,115 Source: Brand USA 2025 Market Intelligence Survey

LENGTH OF STAY DIFFERS ACROSS REGIONS

Travelers expect to spend nearly nine nights on their next international leisure trip, with longer stays planned in Europe and the Americas.

Length of Stay on Next International Overnight Leisure Trip (Nights)



Q: For how many nights do you plan to stay on your next overnight leisure trip?

Base: Respondents likely to take an overnight leisure trip in the next 12 months, n=15,718

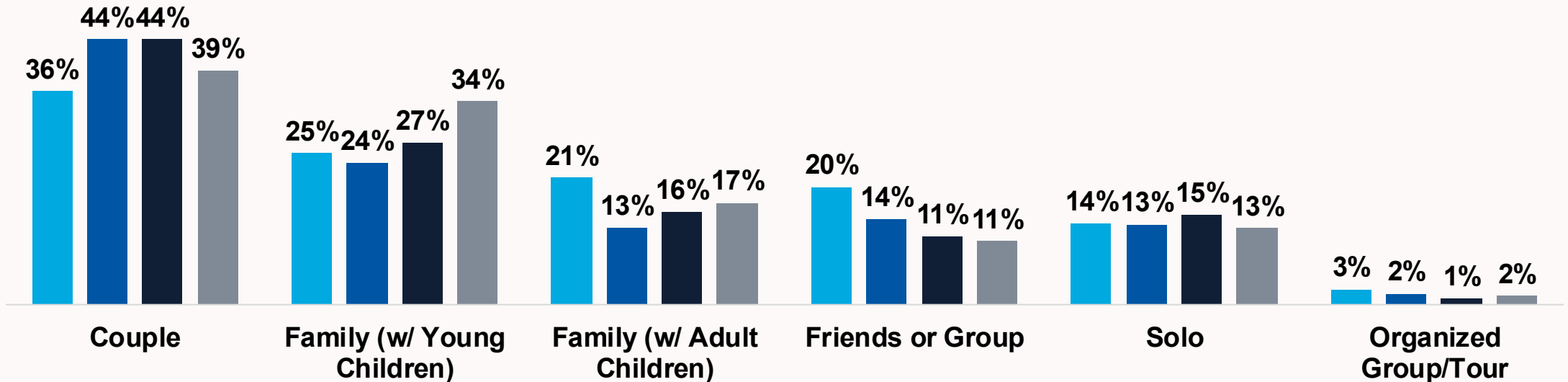
Source: Brand USA 2025 Market Intelligence Survey

FUTURE INTERNATIONAL TRAVEL IS A FAMILY AFFAIR

Couples make up the largest share of future international travelers, followed by families with children of all ages—highlighting the strong role of family-oriented travel across regions.

Travel Party on Next International Overnight Leisure Trip

■ APAC ■ Europe ■ N. America ■ S. America



Q: Who will travel with you on your overnight leisure trip?

Base: Respondents likely to take an overnight leisure trip in the next 12 months, n=17,553

Source: Brand USA 2025 Market Intelligence Survey



HOW TRAVELERS VIEW THE UNITED STATES

**THE UNITED STATES STANDS OUT FOR ITS ENERGY,
DIVERSITY, AND ICONIC EXPERIENCES — YET
PERCEPTIONS AROUND COST AND
FRIENDLINESS SHOW CLEAR OPPORTUNITIES
TO DEEPEN GLOBAL AFFINITY.**



THE UNITED STATES IS SEEN AS DIVERSE & EXCITING – BUT ALSO ARROGANT

Travelers most often describe the U.S. as diverse, exciting, and vibrant, but negative perceptions also stand out.



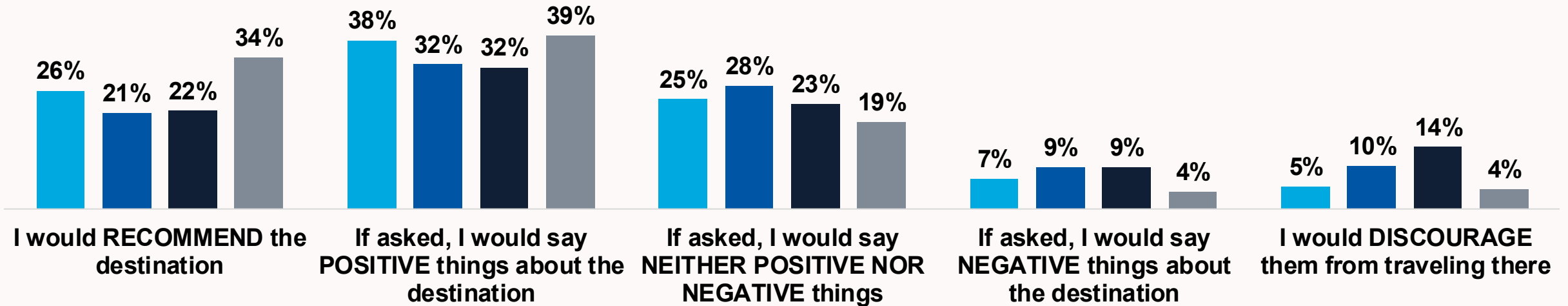
Q: Based on your perception, even if you have never visited, please select which of the following characteristics best describes the United States. **Base:** Total respondents, n=18,115 **Source:** Brand USA 2025 Market Intelligence Survey

POSITIVE PERCEPTIONS OF THE UNITED STATES OUTWEIGH NEGATIVE SENTIMENTS WORLDWIDE

Positive sentiment toward the U.S. outweighs negative sentiment in every region, though travelers in Europe and North America express more neutrality and caution than those in APAC and South America.

Attitude Towards the United States

■ APAC ■ Europe ■ N. America ■ S. America



Q: If a friend or relative were discussing a future overnight leisure trip to the United States in the next 12 months, which would best describe your attitude towards this destination? **Base:** Total respondents, n=18,115 **Source:** Brand USA 2025 Market Intelligence Survey

UNITED STATES ATTRIBUTES: STRENGTHS & CHALLENGES



STRENGTHS

Leisure Attractions:

Travelers rate the U.S. highly for entertainment, dining, and nightlife options.

Iconic Attractions & Landmarks:

Historic sites, museums, and one-of-a-kind attractions are major draws for global travelers.

Natural Features & Landscapes:

Mountains, lakes, and diverse scenery are among the U.S.'s strongest perceived assets.



CHALLENGES

Affordability:

Affordability ranks lowest among all attributes, with many travelers perceiving the U.S. as an expensive destination.

Health & Wellness Offerings:

Wellness experiences are rated below other destination attributes and lag behind global expectations.

Friendliness of Locals:

Perceptions of local friendliness lag behind key strengths.

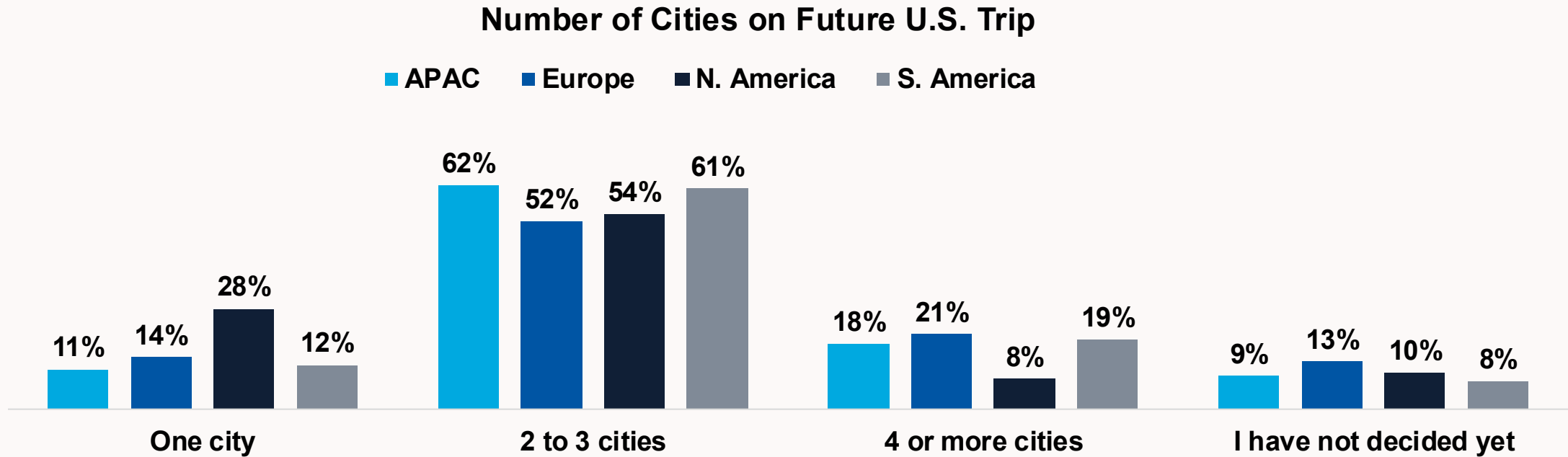
TOP U.S. DESTINATIONS APPEAL BROADLY ACROSS GLOBAL TRAVELERS

From California and Florida to Hawaii and New York, globally recognized destinations remain top contenders across every region.

Rank	Total Respondents	APAC	Europe	N. America	S. America
1	California	California	California	California	Florida
2	Florida	Hawaii	Florida	Florida	California
3	Hawaii	Washington	New York	Hawaii	Washington, D.C.
4	New York	Florida	Hawaii	New York	Hawaii
5	Washington	New York	Washington	Nevada	New York
6	Washington, D.C.	Texas	Washington, D.C.	Texas	Puerto Rico
7	Texas	Washington, D.C.	Texas	Washington	Washington
8	Alaska	Alaska	Colorado	Arizona	Texas
9	Colorado	Mississippi	Alaska	Colorado	Colorado
10	Arizona	Michigan	Nevada	Alaska	Nevada

MOST GLOBAL TRAVELERS PLAN MULTI-STOP TRIPS TO THE UNITED STATES

Most international travelers plan to visit multiple U.S. cities—especially 2 to 3—underscoring broad interest in dispersal and multi-stop travel across all world regions.



Q: How many U.S. cities do you plan to visit on a future overnight leisure trip to the United States?

Base: Respondents likely to visit the United States, n=16,541 Source: Brand USA 2025 Market Intelligence Survey

TRAVELERS SEEK DISTINCTIVE AND CULTURAL U.S. EXPERIENCES

Travelers planning U.S. trips most often include destinations with unique attractions and cultural or historic sites—reinforcing the U.S. position as a place for memorable and authentic experiences.

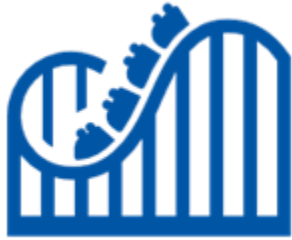
Destination Types on Future U.S. Trip



Q: When considering an overnight leisure trip to the United States, which of the following types of destinations would you include in your travel plans? **Base:** Respondents likely to visit the United States, n=16,541 **Source:** Brand USA 2025 Market Intelligence Survey

U.S. ACTIVITIES REFLECT BOTH FUN AND CULTURAL DISCOVERY

A blend of entertainment, cuisine, and exploration defines what travelers want most from a U.S. trip.



**ATTRACTIONS &
ENTERTAINMENT**



**FOOD & CULINARY
EXPERIENCES**

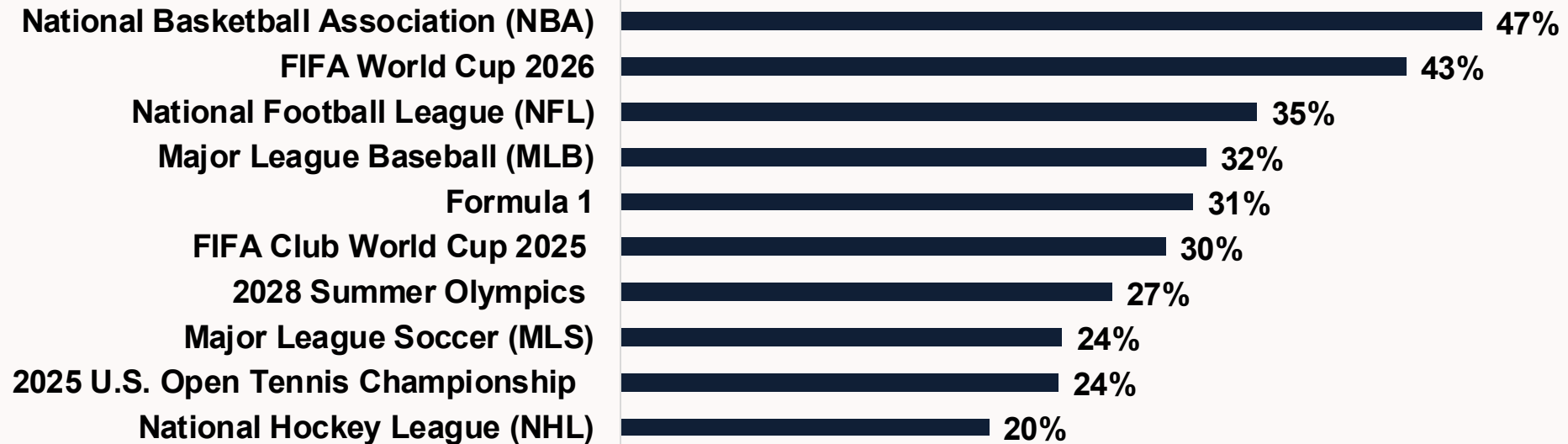


SHOPPING

GLOBAL TRAVELERS ARE EAGER TO EXPERIENCE U.S. SPORTS CULTURE

From the NBA to the NFL and international competitions like the FIFA World Cup, travelers show strong intent to attend live sporting events during future U.S. trips.

Top 10 Sporting Events Likely to Attend on Future U.S. Trip



Q: Which of the following sports events do you plan to attend during your future overnight leisure trip to the United States?

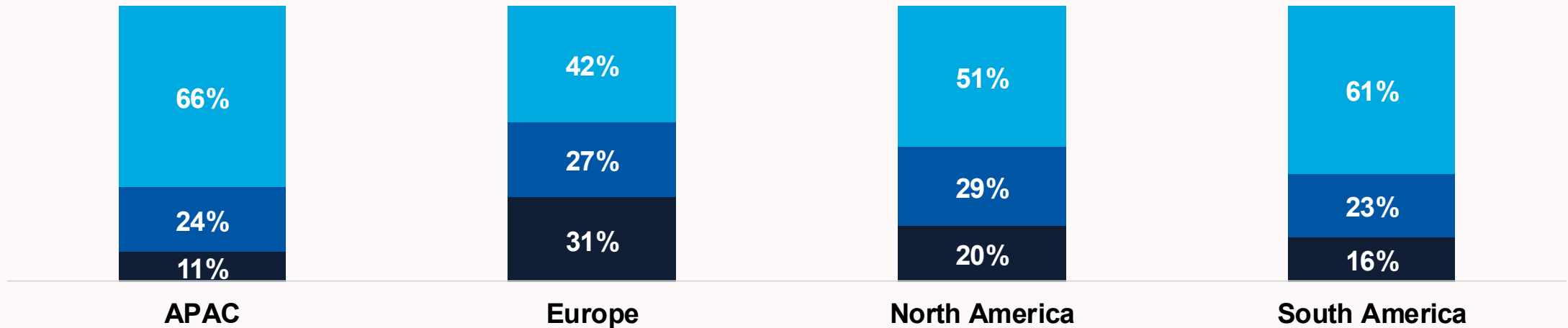
Base: Respondents likely to visit the USA that are interested in sports activities, N=2,049 Source: Brand USA 2025 Market Intelligence Survey

SPORTS EVENTS PLAY A SIGNIFICANT ROLE IN DRIVING U.S. TRAVEL INTEREST

While influence varies by region, professional sports consistently contribute to travelers' enthusiasm for visiting the United States.

Influence of Professional Sports Games

■ Not very/not at all influential ■ Somewhat influential ■ Extremely/very influential



A large stadium at night, filled with spectators. The field is illuminated by bright lights, and several red laser beams are projected across the sky. The stadium is packed with fans, and the atmosphere is vibrant. The text 'BRAND USA' is visible in the top left corner.

BRAND
USA

KEY FINDINGS: MARKET INTELLIGENCE

KEY FINDINGS

Global Travel Landscape

- **Travelers seek trips that deliver emotional value** — centered on relaxation, cultural enrichment, and meaningful shared experiences.
- **Safety, cleanliness, and affordability remain decisive factors**, influencing whether destinations stay in or fall out of consideration.
- Among surveyed travelers, **the United States stands out as both the most visited and the most desired international destination**, demonstrating strong global appeal.

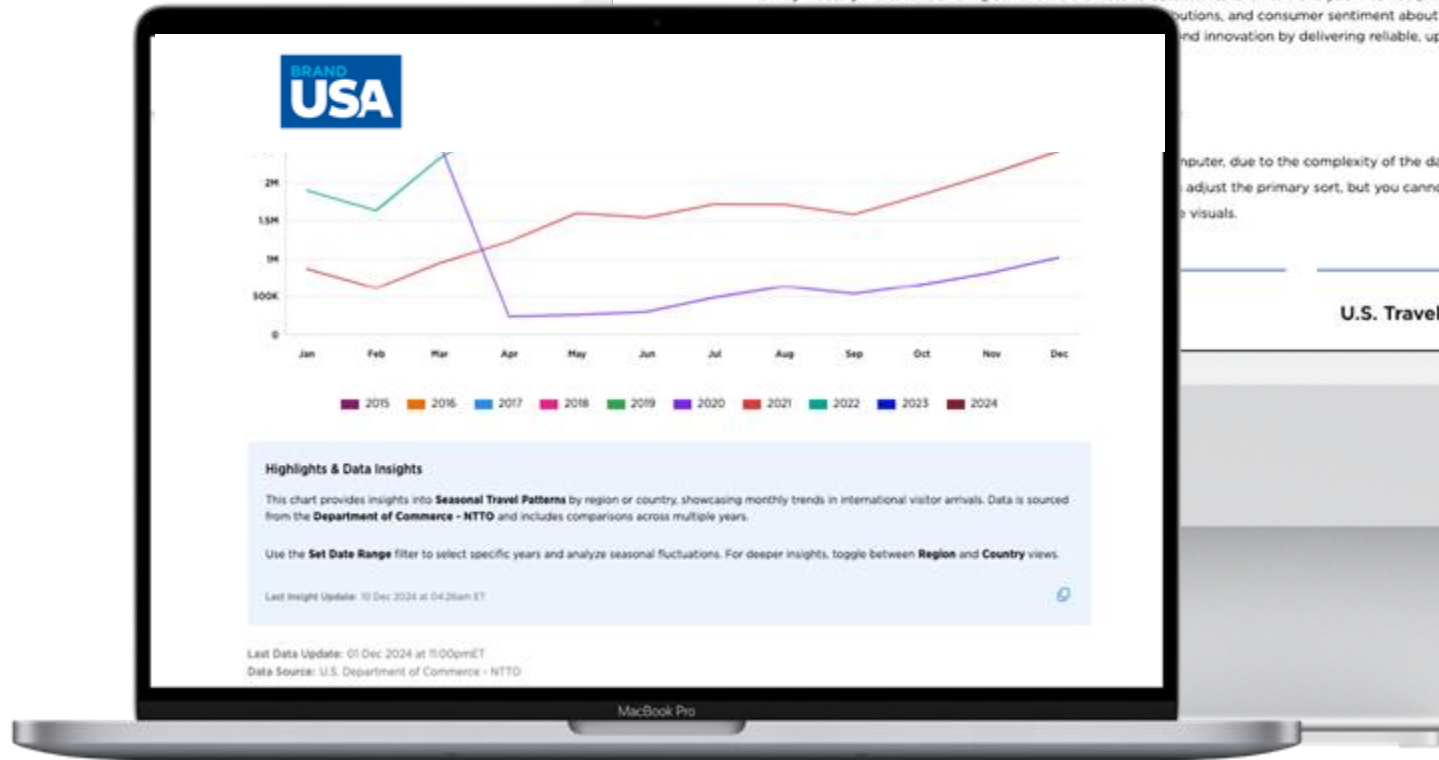
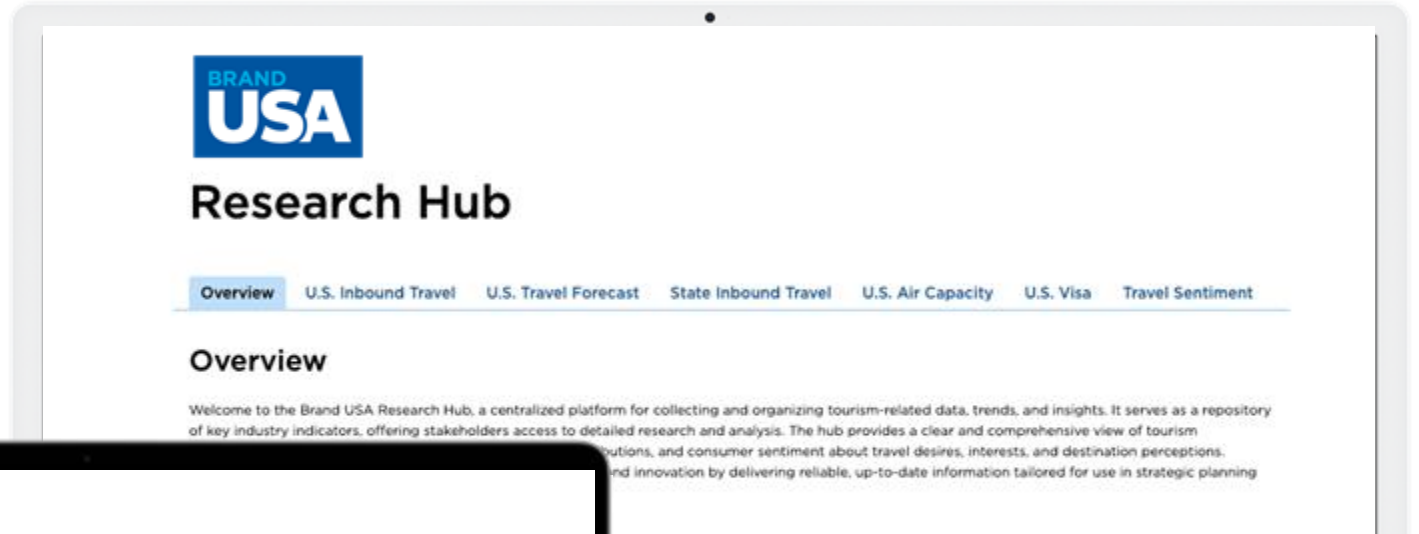
KEY FINDINGS

U.S. Positioning & Demand Drivers

- **Planned trips to the United States are often multi-stop and family-oriented**, creating strong opportunities for dispersal and multigenerational appeal.
- **Perceptions of the U.S. remain strongly positive overall**, driven by excitement and cultural diversity — though cost, cleanliness, and friendliness continue to shape hesitation.
- **Sports, culture, and iconic attractions are powerful demand drivers**, positioning the U.S. well for a landmark decade of major global events.



ACCESSING BRAND USA INSIGHTS



BRAND
USA

THANK YOU

CONSUMER

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

[!\[\]\(9b4000408f3699de3a705e848e6ae947_img.jpg\)](#) [!\[\]\(7bcfe11fa9b766ea760ef408e799588c_img.jpg\)](#) [!\[\]\(0cda0ee968ed5242e73125aeea1b7f86_img.jpg\)](#) [!\[\]\(1723ddd1baf612226291c5f981418f71_img.jpg\)](#) [@VisitTheUSA](#)

INDUSTRY

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

[!\[\]\(7d2c5f9e82a618e76a637ab66cb71793_img.jpg\)](#) [@BrandUSA](#)