



FORT MYERS ANNUAL STAKEHOLDER MEETING

FORT MYERS ANNUAL Stakeholder Meeting

November 12, 2025



FRED DIXON

President &
Chief Executive Officer

BRAND USA





Brand USA drives legitimate inbound travel to the United States to strengthen the U.S. economy, bolster exports, create quality jobs, and build community prosperity.

BRAND USA'S MARKETING EFFORTS (FY24)

\$6B

spending

80K

jobs supported
each year

\$1.7B

Federal, state
and local taxes

\$12.8B

total economic
impact



BRAND USA'S MARKETING EFFORTS (FY13-24)

\$34.7B

spending

40.3K

jobs supported
each year

\$9.96B

Federal, state
and local taxes

\$75.7B

total economic
impact

A scenic sunset over a body of water. The sun is a bright, glowing orb in the upper right, casting a shimmering reflection on the water's surface. In the middle ground, a person stands on a small boat, silhouetted against the sunset, holding a fishing rod. To the right, a wooden pier extends into the water. The left side of the image is framed by dark, leafy branches. The entire scene is set against a clear, hazy sky.

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STATE OF THE INDUSTRY



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U.S. INBOUND VISITATION

2025 YTD & FORECAST

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

From January through July 2025, the U.S. welcomed **38.8 million international visitors** — a 4.0% decrease compared to the same period in 2024.



+12%

1.1 MILLION MORE
VISITORS FROM MEXICO



-20%

2.4 MILLION FEWER
VISITORS FROM CANADA



-2%

303K FEWER
OVERSEAS VISITORS

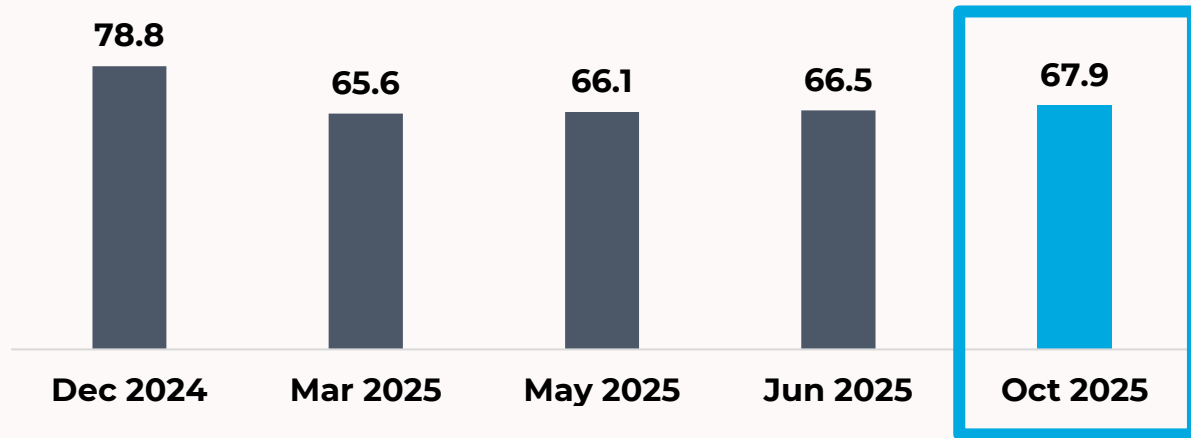
2025 INTERNATIONAL VISITATION FORECAST EVOLUTION

Tourism Economics' 2025 visitation outlook has evolved significantly this year.

The forecast dropped from 78.8 million visitors (+9%) in December 2024 to 65.6 million (–9%) in March 2025.

Since then, projections have steadily improved, reaching 67.9 million (–6%) in October, about 2 million more visitors than projected in March .

2025 International Visitation Forecast



2025 INTERNATIONAL VISITATION FORECAST

Outlook amongst the top 10 markets is mixed.

Top 10 Markets	2024 Actual	2025 Forecast	YOY % Change
Mexico	16,989,950	17,919,500	+5%
Canada	20,241,120	15,746,260	-22%
United Kingdom	4,037,120	4,094,156	+1%
India	2,190,345	2,074,306	-5%
Japan	1,843,880	1,937,379	+5%
Brazil	1,910,260	1,933,037	+1%
Germany	1,994,790	1,782,281	-11%
France	1,706,080	1,592,392	-7%
China	1,625,960	1,555,350	-4%
South Korea	1,700,120	1,535,303	-10%
Total Top 10	54,241,649	50,171,989	-8%
TOTAL INTERNATIONAL	72,390,320	67,865,690	-6%

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AVIATION UPDATE



RECORD USA NON-STOP SEAT CAPACITY AND CONNECTIVITY

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

268

ORIGIN AIRPORTS

104

ORIGIN COUNTRIES

162M

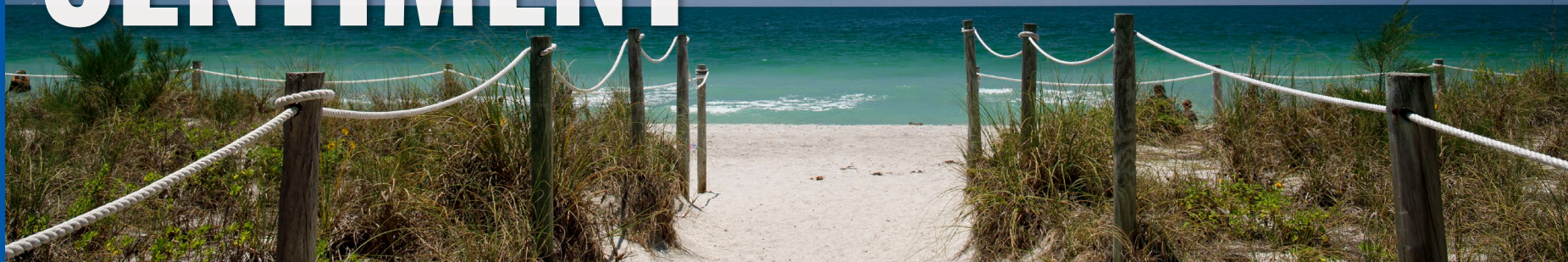
NON-STOP SEATS

2025 NON-STOP SEAT CAPACITY TO THE USA

Top 10 Markets by Non-Stop Seat Capacity			
Market	2024	2025	YOY % Change
Mexico	24,783,860	25,305,866	+2%
Canada	19,388,541	18,612,277	-4%
United Kingdom	13,112,841	12,865,526	-2%
Germany	6,527,156	6,571,773	+1%
Dominican Republic	6,134,277	6,437,487	+5%
Japan	6,218,222	6,326,311	+2%
France	5,459,630	5,506,684	+1%
South Korea	4,124,879	4,382,833	+6%
Italy	3,408,770	3,778,861	+11%
Netherlands	3,533,854	3,526,950	-0%

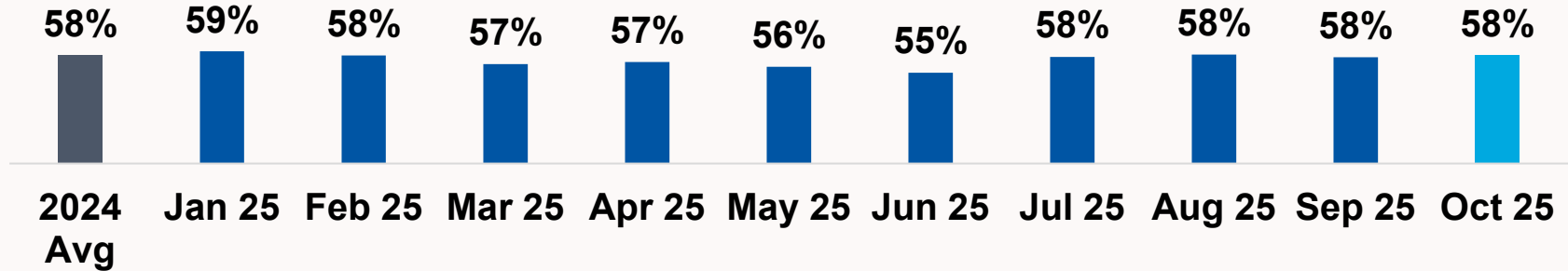
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CONSUMER SENTIMENT



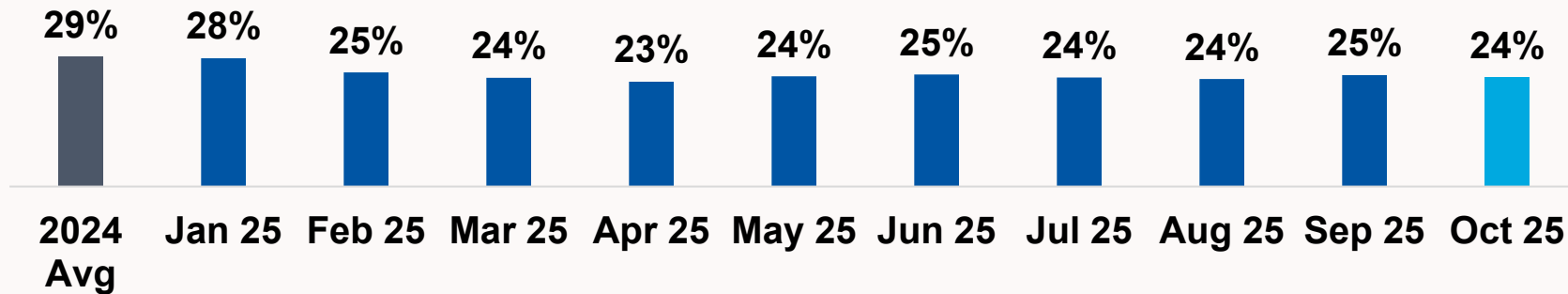
GLOBAL LEISURE TRAVEL INTENT HOLDS STEADY

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



USA TRAVEL INTENT STABILIZES

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



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

Top Destinations Considered on Next International Leisure Trip

#1 Overall

DESTINATION LIKELY TO
VISIT GLOBALLY

11 MARKET AVERAGE

#1

DESTINATION LIKELY TO
VISIT IN

BRAZIL, CANADA, AND MEXICO

#1 Long Haul

DESTINATION LIKELY TO
VISIT IN

ARGENTINA, FRANCE, GERMANY,
JAPAN AND THE U.K.

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, October 2025

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AMERICA THE BEAUTIFUL



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.

CAMPAIGN OBJECTIVES

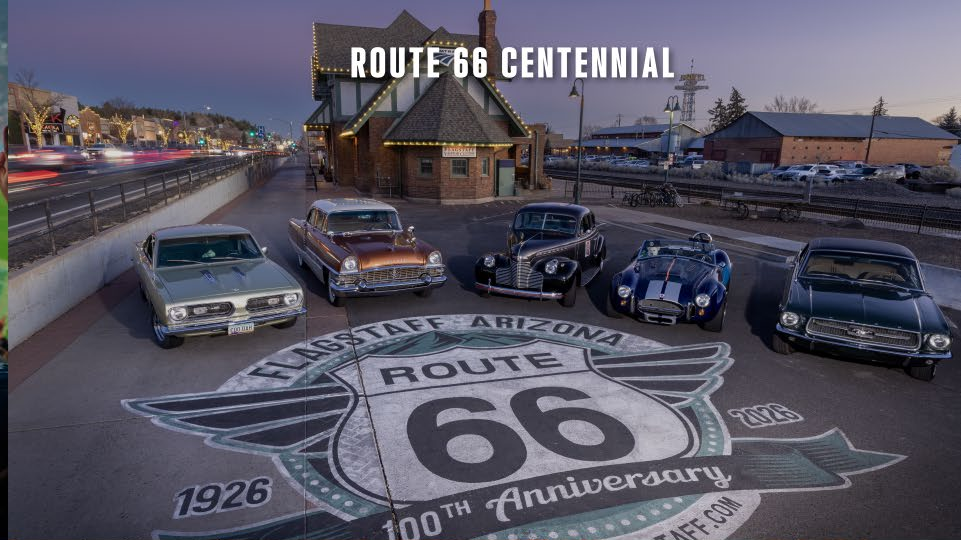
- Drive direct **ECONOMIC IMPACT** for the American economy from international visitors, supporting American businesses and jobs.
- Emphasize **HIGH VALUE TRAVELERS** who will infuse more spending into the American economy.
- **BREAK THROUGH MEDIA FILTERS** by tapping into Americana and nostalgia.
- Generate **EXCITEMENT** to visit the U.S. from travelers who **LOVE** America's people, and culture.
- Leverage the energy from **ICONIC EVENTS**



2026 WORLD CUP



ROUTE 66 CENTENNIAL



AMERICA 250



2028 SUMMER OLYMPICS



AMERICA THE BEAUTIFUL

Get travel ideas

Show me incredible views

Find bucket-list restaurants

Build my family road trip

See top arts destinations

ROAD TRIPS

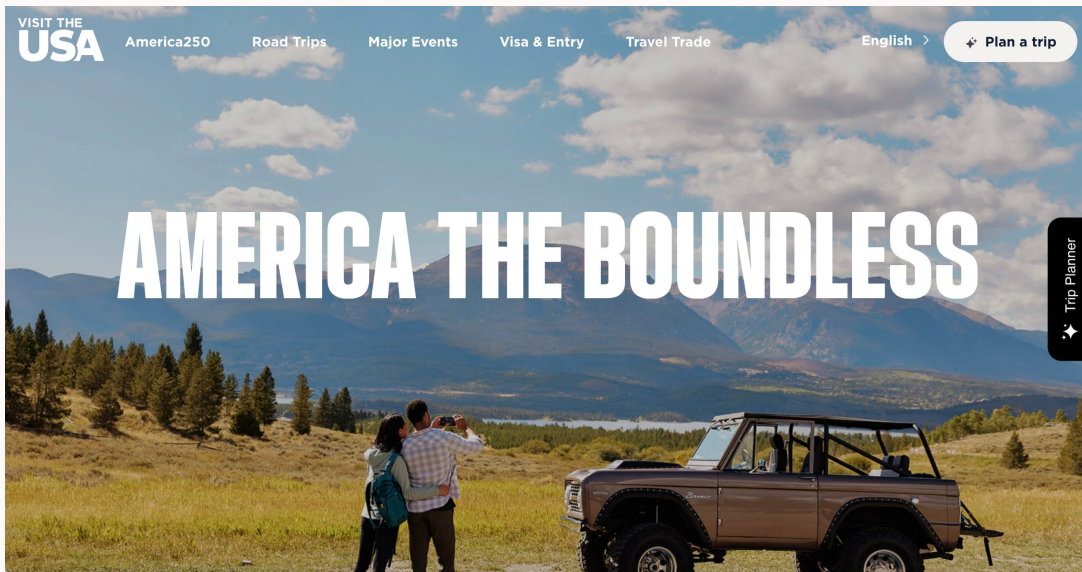
CAMPAIGN SITE STRATEGY

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.





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OPPORTUNITIES FOR ENGAGEMENT

STORYTELLING PILLARS

AMERICA THE BEAUTIFUL



PR EDITORIAL CALENDAR



LUXURY TRAVEL

Luxury Offerings
in the USA



AMERICA 250

America 250 Series



WELLNESS

Restorative Experiences
in the USA



ARTS & CULTURE

USA Through Gardens



OUTDOORS

Outdoor Adventures
in the USA



WHAT'S NEW

What's New
Spring/Summer

EMAIL NEW STORY IDEAS AND PRESS RELEASES TO PRESS@THEBRANDUSA.COM

MARKET-FOCUSED PARTNER INTEGRATED OPPORTUNITIES

THIRD PARTY ALIGNMENT (MARKET-FOCUSED)



UPCOMING BRAND USA EVENTS & WEBINARS

Nov. 18, 2025	Brand USA Board of Directors Meeting
Jan. 12-16, 2026	2026 Mexico Sales Mission <i>(registration closed)</i>
Jan. 18-23, 2026	Brand USA Travel Week India 2026 <i>(registration closed)</i>
Feb 18-19, 2026	2026 New Zealand Expos
Feb. 26, 2026	2026 Australia B2B Day
Mar. 15-19, 2026	Brand USA Travel Week South America 2026
Apr. 20-24, 2026	2026 Southeast Asia Sales Mission
Sept. 28 – Oct. 1, 2026	Brand USA Travel Week U.K. & Europe 2026
Oct. 26-28, 2026	Canada Connect 2026



scan for more event information

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PARTNERSHIP BENEFITS



SUN, FUN AND FANTASY

Miami to Orlando	3 hours 40 minutes / 380km
Orlando to St. Augustine	1 hour 45 minutes / 170km
St. Augustine to Tampa	3 hours 10 minutes / 290km
Tampa to Fort Myers	2 hours / 210km
Fort Myers to Key Largo	3 hours 40 minutes / 330km
Key Largo to Key West	2 hours / 160km
Key West to Miami	3 hours 30 minutes / 260km



TAMPA/ST. PETERSBURG TO FORT MYERS/CAPTIVA AND SANIBEL ISLANDS

⊗ = 0 miles / 0km ● = 2 hours / 210km

Stop in Sarasota, where you can enjoy culture, beaches and great shopping. At The Ringling, an art museum founded by circus magnate John Ringling, see world-class artwork, be fascinated in the Circus Museum and tour the Venetian Gothic-style Ca' d'Zan mansion. Continue south to Fort Myers, the perfect location if you are looking for an active and sporty beach experience. For a more laid-back atmosphere, the beautiful white sands of the barrier islands of Sanibel and Captiva are the perfect destinations for you. Swim in warm waters or kayak in the J.N. "Ding" Darling National Wildlife Refuge on Sanibel to see alligators, birds and other wildlife.

Accommodation: Fort Myers/Captiva and Sanibel Island

FORT MYERS/CAPTIVA AND SANIBEL ISLANDS TO KEY LARGO

⊗ = 0 miles / 0km ● = 3 hours 40 minutes / 330km

Travel south to Naples, known for its art galleries, chic boutiques, fine dining and beaches. Continue to Everglades National Park, a wetland habitat that provides refuge for numerous rare and endangered species such as the American crocodile and the Florida panther. Join a kayak or canoe tour or "swamp hike" to see manatees, alligators, white-tailed deer and myriad species of wild birds. If you are limited for time, companies outside of the park offer airport rides through the watery wilderness. A short drive away is Key Largo, the first in the chain of islands in the Florida Keys, which is home to the world's largest artificial reef, the sunken USS Spiegel Grove, the John Pennekamp Coral Reef Underwater State Park and the African Queen. The clear waters of the Florida Keys National Marine Sanctuary offer unrivaled experiences for divers and snorkelers or glass-bottom boating for the less adventurous. Alternatively, sip a cocktail while enjoying the spectacular sunsets. Take extra days here to relax and absorb the ocean views.

Accommodation: Key Largo



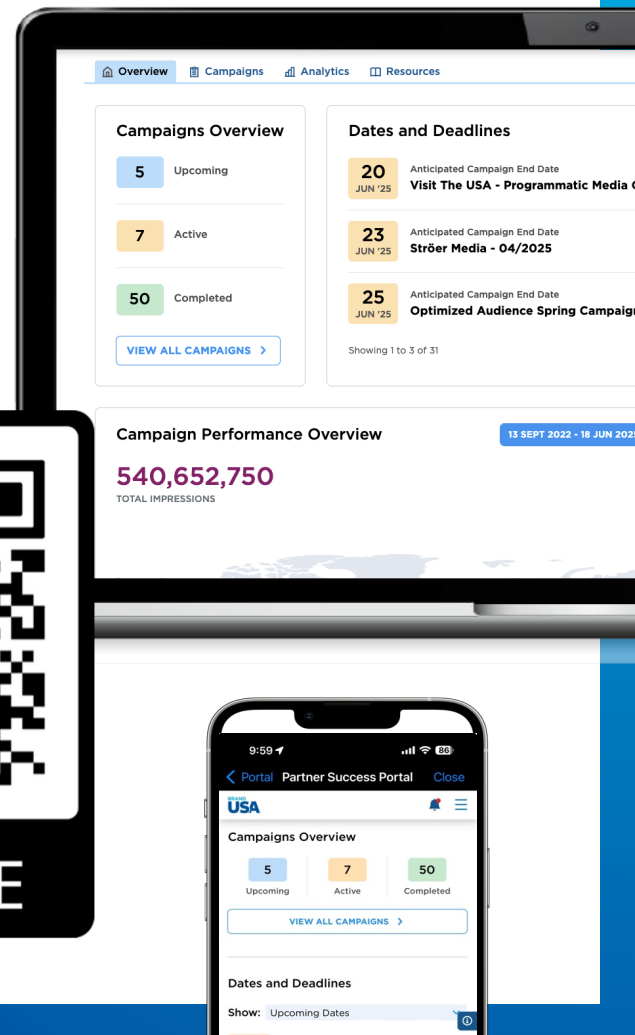


THE PARTNER SUCCESS PORTAL

A best-in-class resource center for partners, equipped with all the essential tools to foster collaboration and achieve shared success.



SCAN ME



**LET'S KEEP THE
CONVERSATION GOING**

Brand USA is here to help support your goals and explore what's next together!

**Reach out and connect with your
Partner Engagement Manager:**



CHELSEA SULLIVAN KAISER

Senior Manager, Partner Engagement

ckaiser@thebrandusa.com



THANK YOU

CONSUMER

AmericaTheBeautiful.com

@ VisitTheUSA

INDUSTRY

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