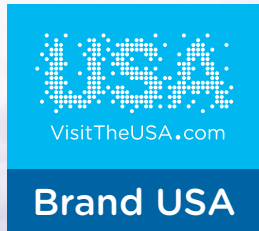


FY2024

OBJECTIVES AND BUSINESS PLAN



MONUMENT VALLEY, ARIZONA



NEW RIVER GORGE,
WEST VIRGINIA

BRAND USA

THE DESTINATION MARKETING
ORGANIZATION FOR THE UNITED STATES

Brand USA is the public-private partnership created by the Travel Promotion Act to market the USA to the world. We are responsible for:

Attracting an additional
8 MILLION
visitors to
the USA



Bringing an additional
\$26.4 BILLION
in visitor
spend in the
past 10 years



Delivering
\$7.6 BILLION
in federal,
state, and
local tax
receipts

Driving
\$58 BILLION
in total
economic
impact to
the USA



Supporting an
additional
37,000
jobs per year



TOGETHER, we are
marketing the diverse and
limitless travel experiences
in the USA.

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WHO WE ARE

WE EXIST TO (VISION)

Enrich lives by welcoming the world to travel to the USA

THEREFORE WE (MISSION)

Create community prosperity through partnership, leadership, and travel inspiration

WE DELIVER FOR

The U.S. travel industry and the communities of the USA

AND DO IT ALL WITH (VALUES)

ACCOUNTABILITY
We strive to be our best in and out of work to deliver results.

COLLABORATION
We are stronger when we come together.

COURAGE
We are bold and take smart risks.

INCLUSIVITY
We are inclusive and welcoming to all.

PARTNERSHIP
We add and create value in our relationships.

SITUATIONAL OVERVIEW



MEMPHIS, TENNESSEE

SITUATIONAL OVERVIEW

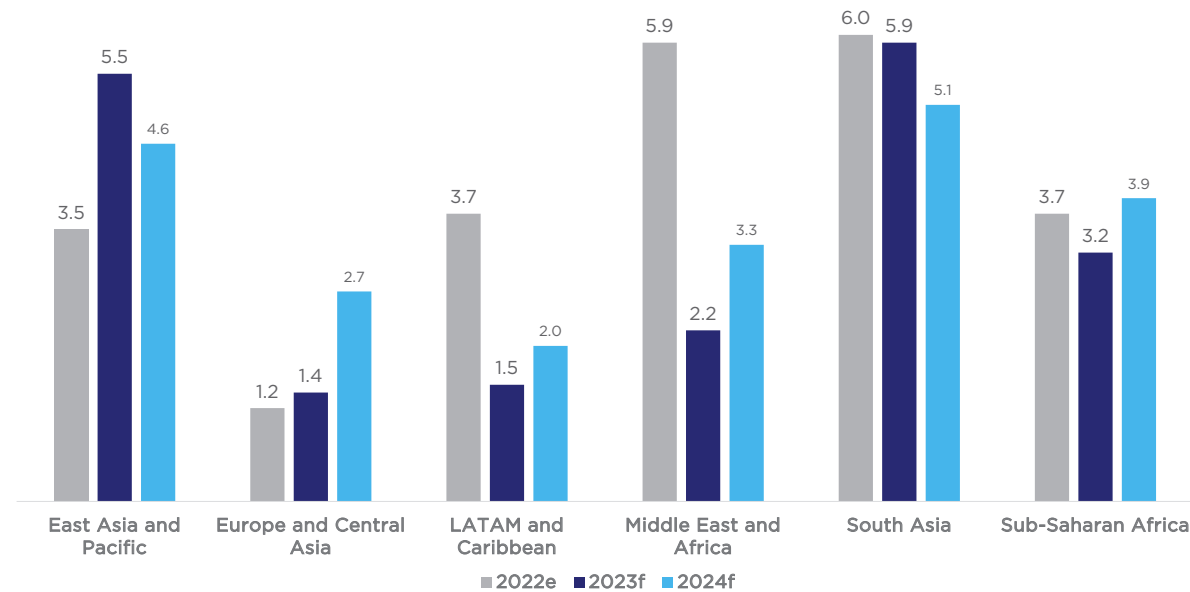
GLOBAL OUTLOOK

GLOBAL ECONOMIC OUTLOOK

The global economy has experienced significant improvements over the past couple of years following the COVID-19 pandemic. While these improvements have been crucial in restoring economic stability and fostering recovery, the future trajectory of the global economy remains uncertain. Projections from the World Bank show a deceleration in global growth during the latter half of 2023, with growth projected to reach 2.1% for 2023, compared to 3.1% in 2022.

The slowdown in 2023 will be the third-weakest pace of expansion in nearly three decades, overshadowed only by the 2009 and 2020 global recessions. The slowdown can be attributed to several factors: geopolitical tensions, inflation, tighter monetary and fiscal policies implemented to curb high inflation, and lingering pandemic-related effects continuing to impact economic activity. A modest recovery is anticipated in 2024, with growth projected to reach 2.4%.

GLOBAL GDP % GROWTH FORECAST



Source: World Bank, June 2023
e = estimate f = forecast

While the global economic outlook is uncertain, projections for GDP growth over the next couple of years varies by region. Growth is expected in the East Asia and Pacific and South Asia regions, likely due to China's reopening and improved prospects in key country economies in those regions. The Latin America and the Caribbean region, the Middle East and North Africa regions, and the Sub-Saharan Africa regions are likely to experience more moderate growth.

Even with somewhat positive projections, the escalation of borrowing costs in advanced economies has the potential to dampen economic activity and trigger financial dislocations in the more vulnerable emerging markets and developing economies. The possibility of more widespread banking turmoil and tighter monetary policies could result in an even more pronounced attenuation of global growth.

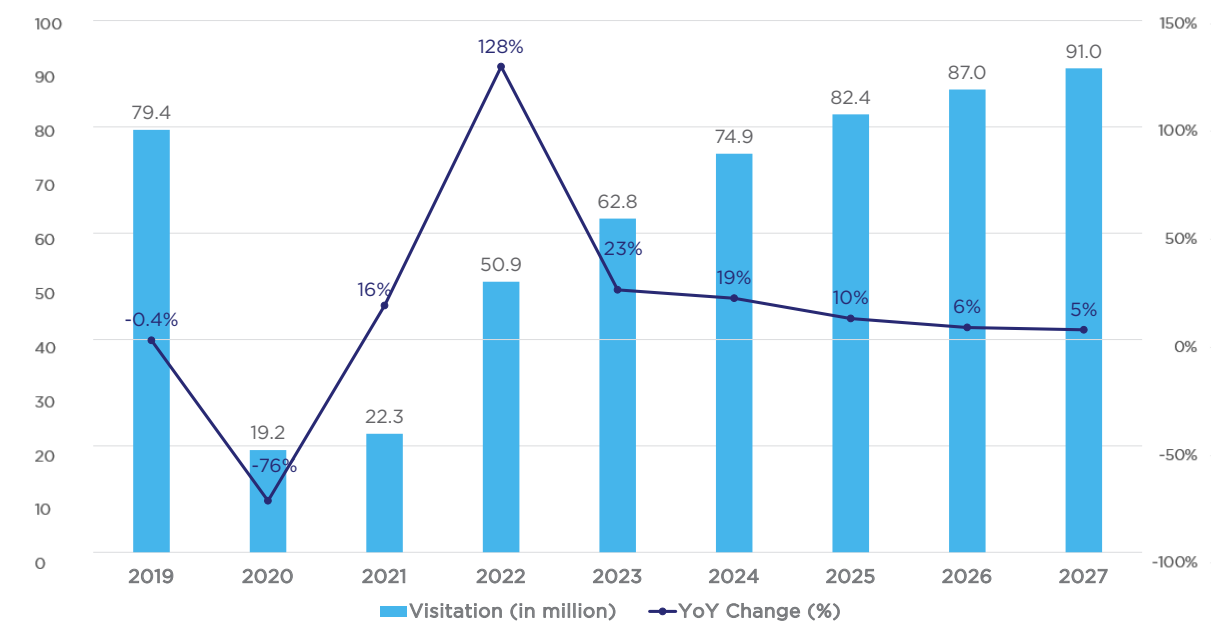


STATE OF INBOUND INTERNATIONAL TRAVEL

Global international travel is gradually approaching pre-pandemic levels, driven primarily by leisure travelers with pandemic savings to spend and a pent-up demand for travel. As the travel and tourism industry enters its third year of post-pandemic recovery, it is important

to acknowledge the robust rebound of international travel that has already occurred. Inbound visitation to the USA experienced a remarkable growth rate of nearly 130% year-over-year in 2022, driven mostly by pandemic induced pent-up demand for travel.

INTERNATIONAL ARRIVALS TO THE USA



Source: U.S. Department of Commerce/NTTO, February 2023



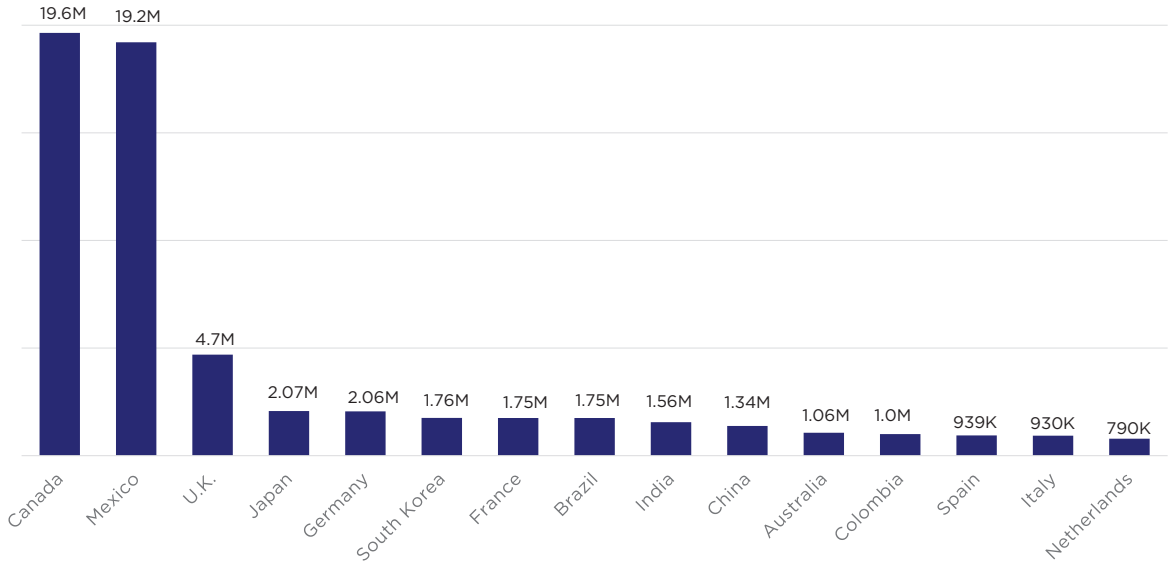
AUSTIN, TEXAS

Forecasts show that total international travel to the United States will reach 79% of 2019 levels by the end of 2023, reflecting a 23% increase from the year prior. Looking to the year ahead, the National Travel and Tourism Office (NTTO) forecast a 19% growth in 2024. This growth will be primarily driven by visitation from Canada and Mexico, which collectively account for nearly 52% of the total international arrivals to the United States. Additionally, key source markets (the U.K., Japan, China, South Korea, Brazil, Germany, France, and India) will provide 23% of the overall inbound travel to the United States and account for 47% of all overseas arrivals.

In 2024, several key markets will surpass pre-pandemic levels. Based on a forecast from NTTO, Mexico and India are projected to surpass 2019 visitation levels and Germany is expected to reach the visitation levels recorded in 2019. Asian countries are experiencing a slower recovery due to border opening delays, slower rebound in air capacity, and cultural aversion to risk. Japan, China, and South Korea are predicted to maintain their positions within the top 10 inbound markets, but not reach 2019 visitation numbers until 2025 or 2026.

Overall international arrivals to the United States are forecast to eclipse pre-pandemic levels—sometimes dubbed “full recovery”—by the end of 2025.

2024 USA INBOUND TRAVEL PROJECTIONS: TOP 15 MARKETS



Source: Tourism Economics, June 2023



WILLIS CREEK SLOT CANYON, UTAH

NATIONAL TRAVEL AND TOURISM STRATEGY

The 2022 National Travel and Tourism Strategy was released by U.S. Secretary of Commerce Gina M. Raimondo on behalf of the Tourism Policy Council. The new strategy focuses the full efforts of the federal government to promote the United States as a premier destination grounded in the breadth and diversity of our communities, and to foster a sector that drives economic growth, creates good jobs, and bolsters conservation and sustainability. Drawing on engagement and capabilities from across the federal government,

the strategy aims to support broad-based economic growth in travel and tourism across the United States, its territories, and the District of Columbia.

The federal government will work to implement the strategy in partnership with Brand USA and other private sector entities, aiming toward an ambitious **five-year goal** of increasing U.S. jobs by attracting and welcoming **90 million international visitors, who will spend \$279 billion, annually by 2027.**

The National Travel and Tourism Strategy goal of reaching 90 million annual international visitors in 2027 requires a compound annual growth rate of over 12% from 2022 through 2027. Current projections from the NTTO and Tourism Economics both suggest that the United States is on track to meet this goal.

The National Travel and Tourism Strategy supports growth and competitiveness for an industry that makes the United States the global leader in revenue from international travel and tourism. The strategy follows a four-point approach:

1. PROMOTING THE UNITED STATES AS A TRAVEL DESTINATION

Leverage existing programs and assets to promote the United States to international visitors and broaden marketing efforts to encourage visitation to underserved communities.

2. FACILITATING TRAVEL TO AND WITHIN THE UNITED STATES

Reduce barriers to trade in travel services and make it safer and more efficient for visitors to enter and travel within the United States.

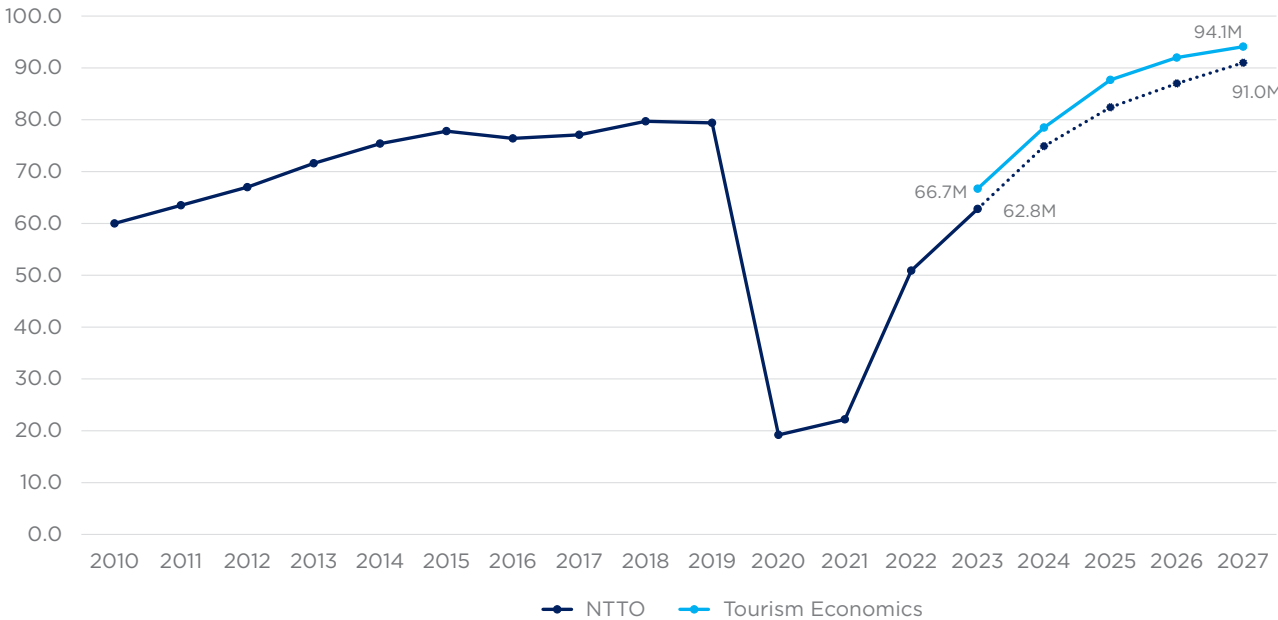
3. ENSURING DIVERSE, INCLUSIVE, AND ACCESSIBLE TOURISM EXPERIENCES

Extend the benefits of travel and tourism by supporting the development of diverse tourism products, focusing on underserved communities and populations. Address the financial and workplace needs of travel and tourism businesses, supporting destination communities as they grow their tourism economies. Deliver world-class experiences and customer service at federal lands and waters that showcase the nation's assets while protecting them for future generations.

4. FOSTERING RESILIENT AND SUSTAINABLE TRAVEL AND TOURISM

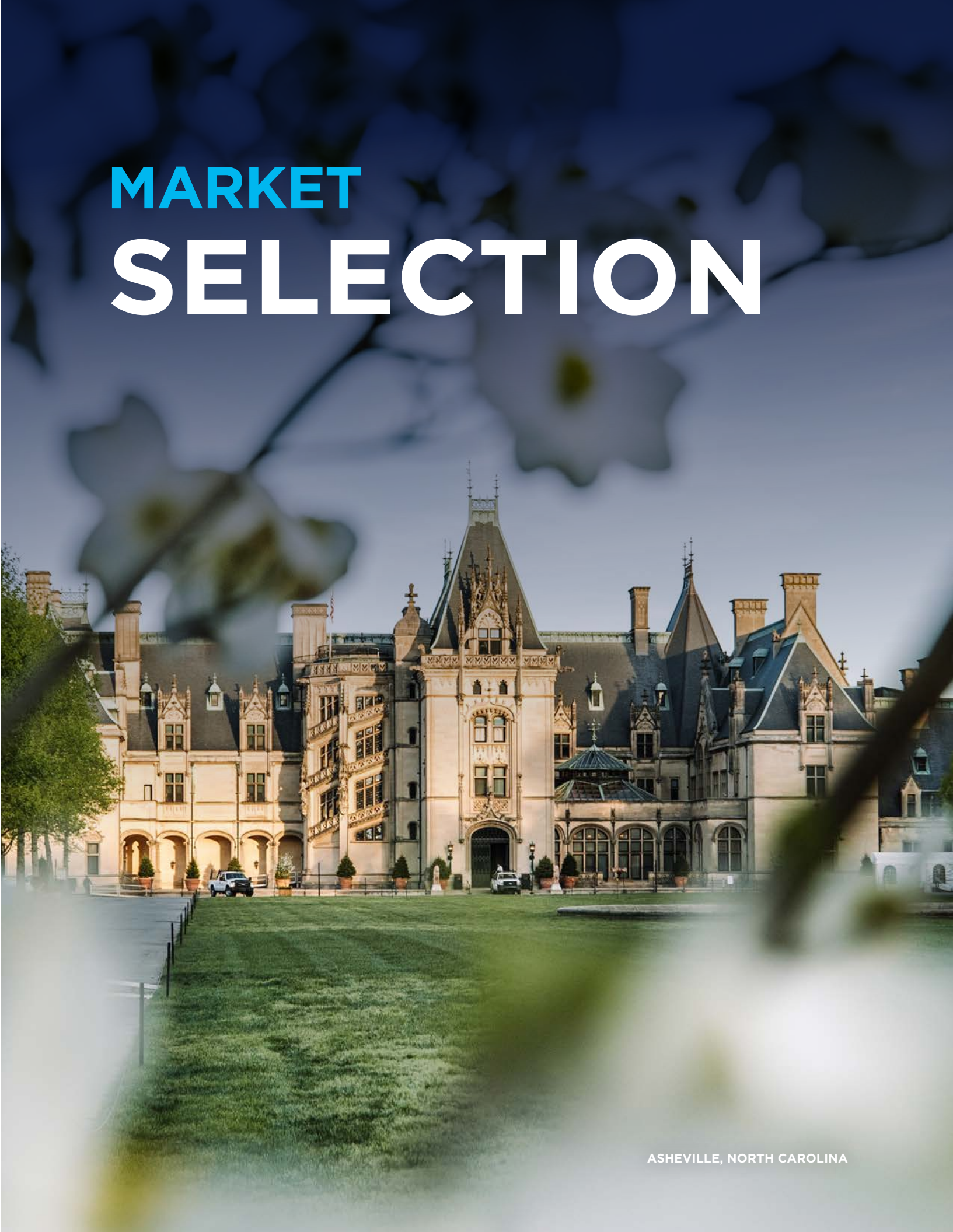
Reduce travel and tourism's contributions to climate change and build a travel and tourism sector that is resilient to natural disasters, public health threats, and the impacts of climate change. Build a sustainable sector that integrates protecting natural resources, supporting the tourism economy, and ensuring equitable development.

USA TOTAL INBOUND VISITATION



Source: NTTO and Tourism Economics
Visitation in millions

MARKET SELECTION



ASHEVILLE, NORTH CAROLINA

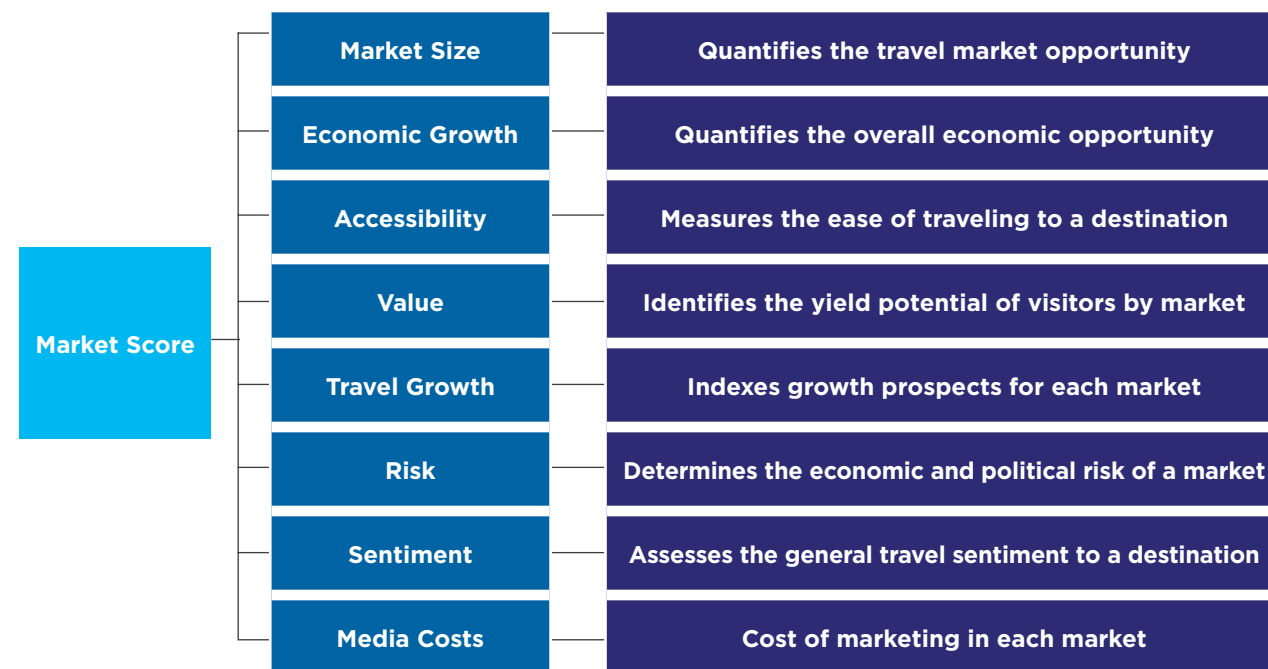
WHERE WE MARKET

Brand USA focuses resources on markets, target populations, and media channels to optimize performance against the mission of growing international arrivals to the USA and ensuring the benefits of spend accrue to communities throughout the country. In order to put resources to their best and highest use, while supporting the ultimate goals of the National Travel and Tourism Strategy, Brand USA takes a holistic analysis of the opportunities across existing target markets and potential new markets.

Brand USA has partnered with Tourism Economics to develop a market selection model and build a standardized scorecard to guide market prioritization

and resource allocation to achieve results in the short- and longer-term. The current model includes 32 indicators to quantify travel market size, spending power, outbound travel, growth prospects, ROI, and potential responsiveness to travel promotion. These indicators are aggregated to a total market score, which is used as a primary input to determine spending allocation. To maximize the model's utility, important indicators like country-specific inbound arrivals to the USA receive higher weighting within the framework.

The schematic below illustrates the indicator categories in the international market scorecard:



The market selection model is the initial step in creating Brand USA's marketing plans. The market scores drive discussions around market prioritization and market-specific resource allocations. Additional important factors are taken into consideration that are not part of the existing model but are critical to

the development of Brand USA's annual marketing approach. These factors include considerations such as Brand USA representation in-country, existing marketing or partner initiatives (consumer marketing campaigns and co-op initiatives), and the status of the travel trade in market.

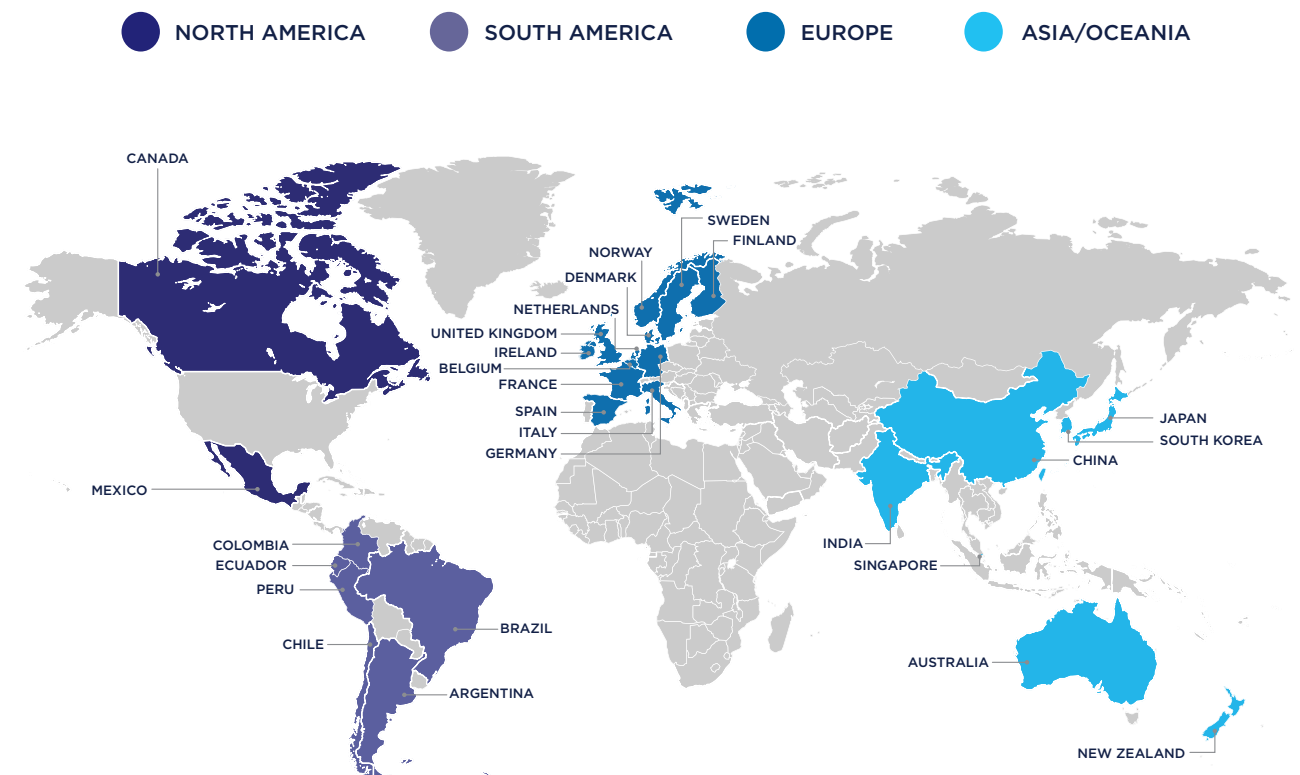


VERSAILLES, KENTUCKY

FY2024 FOCUS MARKETS

Brand USA will engage in varying levels of marketing activities across 17 market regions. While these market regions provide the greatest opportunity to deliver visitors and spend, we will also explore the potential to drive visitation from emerging market regions. Throughout the year, Brand USA will monitor market

dynamics, economic conditions, emerging trends, and shifts in traveler behaviors and preferences. Regular reviews and adjustments to the market prioritization and allocation strategies allow Brand USA to remain strategically agile, responsive to changes in the industry, and proactive to capitalize on emerging opportunities.



FY2024 OBJECTIVES

PICTURED ROCKS NATIONAL LAKESHORE, MICHIGAN

FY2024

OBJECTIVES

With the final remnants of the pandemic receding, FY2024 will be a year to look beyond recovery. The new National Travel and Tourism Strategy focuses on fostering a sector that drives economic growth, creates good jobs, and bolsters conservation and sustainability. The national strategy specifically calls out Brand USA's important role in promoting the USA as a top travel destination, an especially important mechanism to increase international visitation to the USA.

Brand USA's FY2024 objectives speak to how our organization will support the goals of the national strategy. For example, incremental impact on international arrivals to, and spend within the

United States is a direct contribution towards reaching 90 million visitors and \$279 million in spend. However, work on improving perceptions of the destination and increasing desirability to visit is crucial to sustain success in delivering that visitation and spending over time.

Objectives related to inclusion of the broad swath of travel industry participants also supports the national strategy pillar to broaden marketing efforts to encourage visitation to underserved communities. Overall, these objectives support the National Travel and Tourism Strategy and help set the foundation for the long-term future of the industry.



CAPE HENLOPEN, DELAWARE

ORGANIZATIONAL OBJECTIVES	GOALS
Establish and maintain the USA as the preferred global travel destination	Create innovative global marketing programs to inspire and sustain visitation
Contribute to community prosperity by driving international visits and spend	Build a foundation for long-term growth of the U.S. visitor economy
Lead and engage stakeholders of the U.S. travel industry	Develop valuable programs for stakeholders to support international travel efforts
Maintain excellent organizational integrity and reputation, setting the standard for the global travel industry	Evolve Brand USA for the future and grow our culture and team

STRATEGIES	KPIs
<ul style="list-style-type: none">Build positive global brand perceptionIncrease marketing effectiveness on intent to visit / desirability	<ul style="list-style-type: none">3% increase in overall brand perception of the USA as a travel destination (macro) ; 6% increase in brand perception from those exposed to Brand USA marketing activities (org)3% YoY growth in travel intent (macro); 5% increase in travel intent for those exposed to Brand USA advertising (org)
<ul style="list-style-type: none">Grow visitation from key international marketsIncrease visitor spend through growing frequency of visits, extending length of stay, and/or pursuing affluent travelersDrive traveler dispersal to destinations across the U.S.Expand Brand USA’s presence in markets with the greatest opportunities for growth	<ul style="list-style-type: none">18% YoY international visitor growth from Brand USA Core markets (macro); 30% YoY increase in incremental visitation attributable to Brand USA (org)17% YoY growth in visitor spend (macro); 35% YoY visitor spend attributable to Brand USA activities (org)Include a minimum of 180 “beyond the gateway” destinations within Brand USA marketing effortsA minimum of 5% of Brand USA media budget invested in growth markets
<ul style="list-style-type: none">Nurture existing collaborative partnershipsExpand opportunities for partner engagementMaintain financial contributions from partnersEngage and promote a diverse base of U.S. stakeholders and create opportunities throughout the travel industry for underrepresented groups	<ul style="list-style-type: none">Maintain 90% partner sentiment that Brand USA provides value to their organization; Maintain annual partner retention rate of over 90%300 unique stakeholder participants across all programsFulfill the \$50MM cash contribution requirementEstablish a benchmark for Brand USA’s support / promotion of minority-owned, small, and rural businesses
<ul style="list-style-type: none">Maintain top standards that protect our public integrityBuild positive awareness of Brand USA within the global travel industry	<ul style="list-style-type: none">Achieve 100% compliance and a clean audit10% increase in overall positive earned media impressions for Brand USA mentions in U.S. or Global Travel Trade or business publications

FY2024 MARKETING PLAN

SAN ANTONIO, TEXAS

FY2024 MARKETING PLAN

TRAVELER JOURNEY

The traveler path to purchase is more dynamic and more complex than ever before. Initial travel inspiration can come from anywhere - advertising, films and TV, social media content, or word-of-mouth recommendations. Today, travelers consume a lot of travel content and utilize many different resources as they narrow down their destination selection during their path to purchase, making it necessary for travel brands seeking influence to be omnipresent.

Understanding each stage of the traveler journey is crucial for businesses in the travel industry. Travel brands that recognize the needs, motivations, and behaviors of travelers at each stage of their journey will be in the best position to attract and persuade travelers to purchase. The traveler journey can be outlined in six key stages.



BRANDING & INSPIRATION

The initial stage where travelers start thinking about a trip. During this stage, most travelers are not set on a specific destination, creating opportunities for destination brand influence. Compelling destination content, beautiful imagery, travel advertisements, and promotions are highly influential in moving travelers further into the path to purchase.

EDUCATION

In this stage, travelers begin exploring various sources of travel content as they gather ideas and begin learning about destinations and the experiences they might want to have on their trip. Their destination consideration set shrinks as they narrow down the potential options.

SPOKANE RIVER, WASHINGTON



WEST YELLOWSTONE,
MONTANA

SHOPPING

Once travelers have narrowed down their options, they move forward with planning and pricing out their trip. During the shopping phase, travelers seek detailed information about destinations, accommodations, transportation options, attractions, and activities. They compare prices, read reviews, and consider factors like proximity, convenience, and the overall value of the experience. Online travel platforms, travel review websites, and consultations with travel experts play a critical role in providing comprehensive information to help travelers make informed decisions.

VISITING

The core stage of the traveler journey is the travel experience itself. Travelers embark on their journey, explore their chosen destination(s), immerse themselves in the local culture, dine in local restaurants, and engage in various activities and experiences.

To ensure the United States remains a top travel destination, Brand USA primarily engages with travelers across every pre-travel stage of this journey either directly or through partnerships with other travel companies. Understanding traveler behaviors, Oxford needs, and preferences at each stage of the path to purchase is crucial to effectively grow the visitor economy in the USA.

In today's fragmented and competitive global consumer media landscape, it is imperative for Brand USA to establish a strong brand presence and remain top of mind throughout the inspiration, dreaming, shopping, and booking phases of the

BOOKING

Travelers begin shaping their final trip itinerary in the booking phase. They select their preferred flights and accommodations, and make reservations. Online travel agencies, airline websites, hotel booking platforms, and other travel providers play a crucial role in facilitating this stage, providing seamless booking experiences and offering a range of options.

RELIVING & SHARING

After returning from their trip, travelers reflect on their experiences and often share them with others. They may write reviews on travel platforms, share photos and stories on social media, and recommend destinations and accommodations to friends and family. This stage contributes to the cycle of inspiration for future travelers, helping to shape their path to purchase.

traveler journey. By aligning our marketing efforts to each critical phase of the traveler journey, Brand USA can differentiate itself in the competitive landscape, stand out among the multitude of choices, and deploy traveler-focused messaging that resonates with international consumers.

Brand USA will employ a multi-channel approach, leveraging data-driven insights to develop content, collaborate with media and in-country trade partners, and optimize our messaging. The following plan outlines Brand USA's core marketing initiatives that are aligned to each phase of the traveler consumer journey.



LAKE COUNTY, OREGON

CORE ACTIVITIES

Brand USA creates innovative global marketing programs that inspire visitation to the United States. We reach potential travelers in key source markets around the world through consumer-centered strategic marketing campaigns and always-on marketing efforts, by educating and engaging with the in-market travel trade, and with partner marketing initiatives that facilitate opportunities for U.S. travel industry businesses to reach qualified audiences in markets that are most important to them.

CONSUMER MARKETING

Brand USA's global consumer marketing efforts create a powerful platform to drive international visitation to the USA. Our investments in consumer marketing activities enhance the brand perception of the USA as a travel destination, raise awareness about many lesser-known destinations and experiences in the United States, and drive visitation desirability. Through direct-to-consumer marketing initiatives like always-on content and social media marketing, targeted advertising campaigns, and captivating storytelling, Brand USA is able to reach the right people, with the right message, at the right time to influence their travel decisions.

TRAVEL TRADE ENGAGEMENT

Engaging with the travel trade is a vital marketing activity to grow international visitation to the USA. Travel agencies, tour operators, and travel consortia

act as a crucial intermediary between Brand USA and potential visitors. Through partnerships with in-country travel trade, Brand USA facilitates educational training sessions, creates cooperative marketing programs that drive U.S. trip sales, communicates U.S. travel policy, and facilitates business connections between local travel trade and U.S. tourism businesses. Actively building and maintaining relationships with travel trade professionals in markets that deliver the majority of inbound travelers to the USA and in emerging markets where the USA has the most potential to increase market share is a core pillar of Brand USA's marketing strategy.

PARTNERSHIP MARKETING

The U.S. travel industry comprises a vast network of stakeholders supported by Brand USA's international marketing initiatives. In the simplest form, Brand USA's partnership marketing efforts help align organizations across the travel industry and foster a collective effort in promoting the country to potential visitors.

To effectively drive global traveler inspiration, Brand USA will implement a comprehensive marketing plan designed to captivate and engage potential visitors at each stage in the traveler journey.

Now let's take a look at Brand USA's approach to consumer outreach, travel trade engagement, and partnership marketing efforts through each of the pre-travel phases of the traveler journey.

ORGAN MOUNTAINS,
NEW MEXICO

ACTIVITIES ALIGNED TO THE TRAVELER JOURNEY

Our brand marketing campaigns will drive reach and top-of-mind awareness. We will elevate consumer perception of the USA, reach them during key planning windows, and pique their curiosity and interest in visiting the USA. These efforts aim to increase desirability and travel intent, even if consumers are not actively considering a trip at the time they see our campaign.

Brand USA targets consumers in key source markets around the world through media placements on digital, social, broadcast, print, and out-of-home. The media mix, campaign timing, messaging, and imagery are tailored to consumer proclivities, consumption habits, and cost efficiencies within each market.

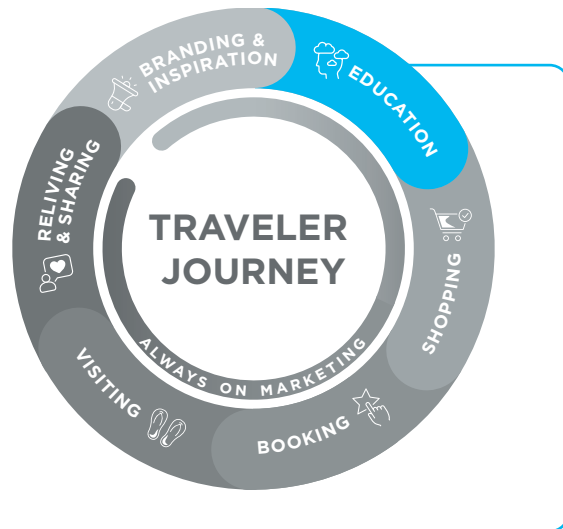
BRAND MARKETING AND GLOBAL ADVERTISING

Brand USA will undergo a comprehensive consumer brand refresh in order to strengthen the brand presence of the USA as a travel destination. This work will begin with research on how travelers in our core inbound markets feel about the USA and insights into their travel preferences and behaviors, leading into the development of our brand positioning (how we will communicate our unique value proposition to global travelers), followed by a refresh of our brand identity (the visual look, feel, and tone of our brand), and finally the development of creative assets, brand guidelines and an international toolkit, and a launch campaign. The goal of this effort is to enhance our competitive positioning by improving global brand perception of the USA as a travel destination especially given the recent increase in competitive destination promotion.

Our brand marketing campaigns will drive reach and top of mind awareness. We will elevate consumer perception of the USA, reach them during key planning windows, and pique their curiosity and interest in visiting the USA. These efforts aim to increase desirability and travel intent, even if consumers are not actively considering a trip at the time they see our campaign.



EDUCATION

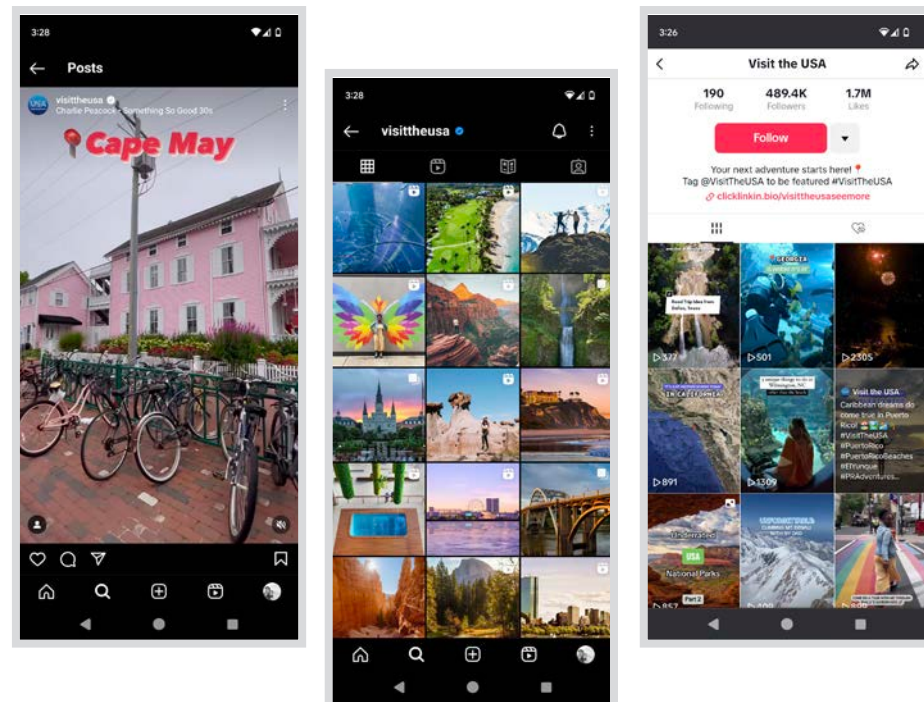


- Social Media & Content Creator Marketing
- United Stories
- Content Marketing
- Digital & Print Magazine
- Earned Media
- Cooperative Marketing

SOCIAL MEDIA AND CONTENT CREATOR MARKETING

Brand USA creates and distributes inspiring and informative content to a set of global travelers where consumers spend the majority of their time online—TikTok, Facebook, Instagram, and YouTube. Ongoing social content educates prospective travelers on what the USA has to offer and serves as a consistent marketing tool to help grow brand affinity. Through community managers in 11 key source markets—Australia, Brazil, Canada, China, Colombia, France, Germany, India, Mexico, South Korea, and the U.K.—we regularly engage with consumers, listen and gain timely insights about travel experiences and brand perceptions, and then develop relevant and meaningful social content to maximize impact.

Travelers are significantly influenced by the recommendations of people who have previous experience with a destination. Brand USA works with influential content creators to share their personal experiences traveling in the USA. These content creators are credible and have engaged audiences who seek for inspiration and information curated to their interests. Brand USA works with vetted content creators to share stories that highlight unique U.S. vacation activities and encourage multi-state trips. Content creators are an important word-of-mouth marketing tool and a cost-efficient source of user-generated content to keep our always-on social content feeling fresh.



UNITED STORIES

United Stories is a short-form content platform that helps increase traveler familiarity with a specific destination, region, or experience. This award-winning digital campaign takes viewers on the road through the eyes of influencers, storytellers, and locals as they visit hidden gems, cultural meccas, attractions, events, and points of interest throughout the country. This approach leverages authentic and compelling voices, and focuses on the real human experience of reconnecting and uniting through travel. It is an effective tool to educate prospective travelers by placing them alongside travelers as they explore lesser-known destinations.



CONTENT MARKETING

Content marketing is an incredibly powerful storytelling tool. Brand USA creates and distributes content in a variety of formats (articles, videos, audio, episodic) that inspires and educates potential travelers. Research conducted on destination selection indicates that the majority of international tourists utilize website content to inform their decisions. Prospective travelers in most markets start with search inquiries as they explore the plethora of potential travel options, which is why Brand USA prioritizes investments in search engine marketing (SEM) and search engine optimization (SEO). In FY2024 Brand USA will expand our search efforts to have an always-on presence in most key source markets.

Content on VisitTheUSA.com is available in eight languages with articles and videos added weekly. It also features a self-directed, localized language trip planner. This trip planner contains up-to-date information about events and activities for over 4,000 U.S. cities. Potential travelers can customize their own trip by date, events, and location, and share it directly from the site with family and friends.

In the coming year, we will undergo a website redevelopment project to ensure that the content we create continues to be relevant, informative, and

simplifies the travel planning process for prospective visitors. We will also create theme-based content hubs around shopping and in celebration of the 100th anniversary of the iconic Route 66.

Brand USA deploys long-form episodic content to inspire and educate potential travelers. GoUSA TV is a smart television network available in over 50 countries that provides an immersive experience around U.S. travel activities as people relax in front of their TVs. GoUSA TV streams shows featuring U.S. road trips, great outdoors adventure, urban culture, culinary delights, hidden gems, and marquee attractions about every U.S. state and territory. GoUSA TV is continually creating original programming and we will produce at least 25 new episodes this coming year in addition to expanding partnerships with local destinations who create their own original content that we can help distribute. In FY2024 we will continue to expand our distribution into other markets and grow our audience within all markets where the network is available.

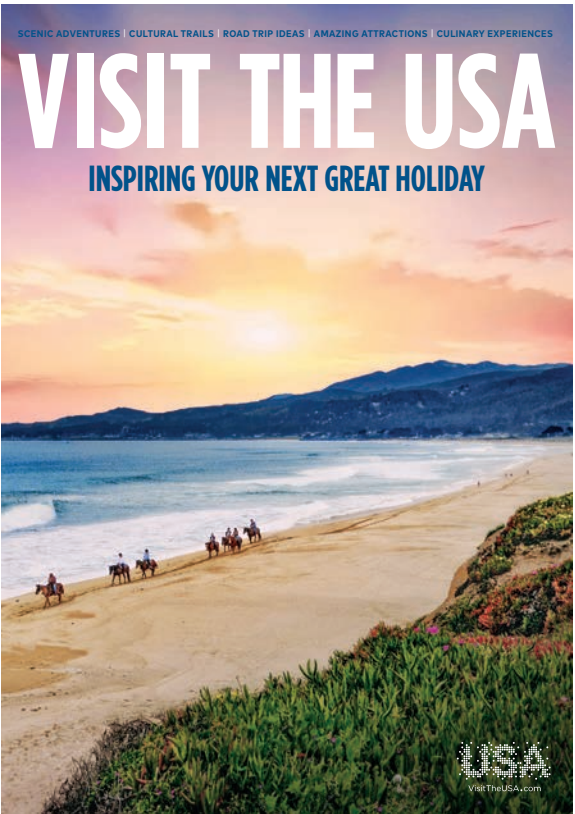
DIGITAL & PRINT MAGAZINE

Brand USA continues to create and distribute Global Inspiration Guides. This editorially driven, thematic magazine is circulated digitally and in print. This “Visit The USA” product focuses on road trip/itinerary content designed for travelers and planners. The magazine utilizes crisp destination descriptions and gorgeous photography to encourage travel dreaming. Interactive rich media units are deployed to educate and bring in a high-quality, proprietary audience. Content is localized in-language and distributed in all priority markets. It is also available through consulates and embassies, at key international travel trade events and digitally through international tour operators, and on VisitTheUSA.com. In FY2024 we will increase distribution of the inspiration guide content generating 30 million digital media impressions and circulating 125,000 print guides.

EARNED MEDIA

Earned media is a powerful and cost-effective tool that creates trust with its audience and inspires the international traveler to visit the United States. Brand USA deploys a targeted earned media strategy to gain coverage about the USA in national newspapers, consumer magazines, online platforms, and publications. Complementing paid media strategies, earned media allows Brand USA to shape and control the narrative when telling the stories of the USA. It is also hugely beneficial to domestic travel businesses looking to grow their international presence.

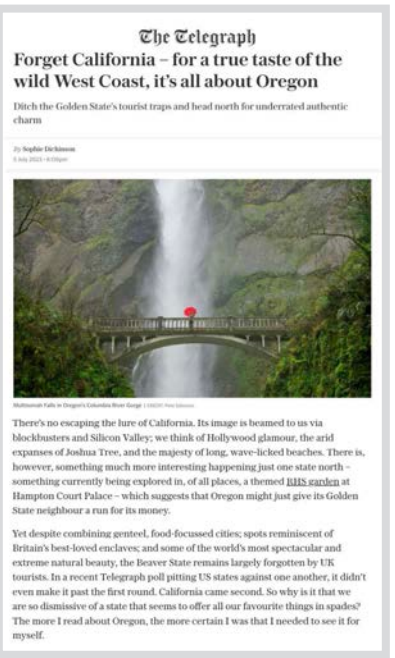
Brand USA curates storytelling pillars to reflect evolving travel trends. These pillars provide the foundation for global press releases and pitches, feature ideas, and press trips to satisfy the global media’s hunger for compelling stories that generate column inches beyond the travel pages. Brand USA develops the pillars by reviewing global trend reports and liaising with senior international editors and tier-one freelancers to gain a comprehensive understanding of the global media climate and the stories journalists and editors are excited to tell. Through these earned media initiatives, Brand USA works hand in glove with international journalists to play a crucial role in the traveler decision journey on two different levels. The first is to educate and inspire the potential traveler on the wealth of opportunities and experiences to be enjoyed across the USA, particularly in lesser-known destinations. The second is to provide consumers with an impetus to book imminently, linking coverage to new flight



routes, festivals, sporting events, and exhibitions as well as attraction openings.

In FY2024, a series of global press releases and custom pitches, based on the storytelling pillars, will continue to bring significant media attention to lesser-known destinations. We will continue to highlight diverse communities, promote small and minority-owned businesses, and showcase inclusive travel opportunities for people of all interests and abilities. Brand USA will also create and update quarterly a global journalists’ guide on “What to See and Do Across the USA” spotlighting key happenings across the country. This forms the basis of listicles, travel news items, and press trip inspiration. Brand USA will organize a minimum of four visiting international media group trips per year to destinations throughout the country.

Brand USA will also continue to facilitate relationships between international journalists and local and regional destination marketing organizations. Brand USA’s global presence and perspective allows it to match international journalists with the appropriate destination marketing organization to plan effective press trips, develop quotes for travel features, and cultivate story ideas. This important work will continue throughout FY2024 and feature all parts of the country, including rural and urban communities.



COOPERATIVE MARKETING

Cooperative marketing allows Brand USA to weave together and amplify the diverse travel experiences promoted by travel industry businesses throughout the United States in a cohesive and compelling way. Individual destinations and businesses have the best understanding of what makes them unique, and Brand USA has the channels and platforms to deliver

their messages to travelers around the world. Brand USA will develop a series of cooperative marketing programs that leverage our global marketing activities and create partner amplification opportunities to pull potential international travelers further down the path to purchase.

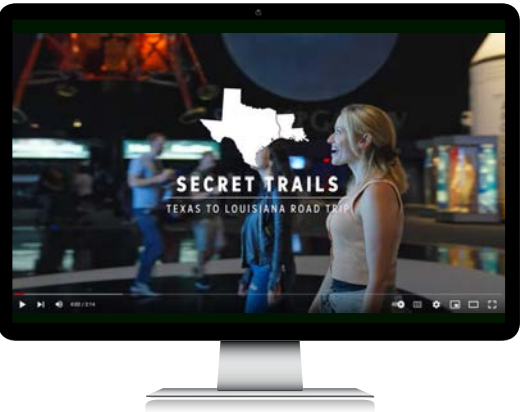
DATA-DRIVEN DISTRIBUTION

In FY2024 Brand USA will continue to build a proprietary first-party data pool. This initiative provides us with deeper audience insights to drive our overall media strategies in order to achieve more effective and targeted distribution opportunities for our partners. We will capitalize on all opportunities arising from our paid media campaigns in consumer marketing to populate consumer data into a clean room technology platform, the Adara Consortium. Once the data is anonymized through the platform, it can be utilized to drive partner program distribution, enabling us to retarget a more highly qualified audience. This approach of reaching qualified consumers more effectively will enhance various opportunities available for partners and also offer additional layers of economic impact reporting.



OPTIMIZED AUDIENCE CAMPAIGNS

The Optimized Audience Campaigns are full funnel, direct to consumer opportunities designed to drive engagement and activation during key planning periods, leveraging data and market insights for highly targeted executions. Campaigns include in-depth, partner specific KPI and performance reporting, including reach, engagement, and attributable booking metrics.



CUSTOM PARTNERSHIPS

In addition to global programs, in FY2024 Brand USA will continue to offer unique and customized partner program opportunities to reach consumers through relevant media channels globally. These customized programs bring partners together for marketing activities with global travel trade, consumer advertising, and earned media initiatives. These opportunities cover a range of markets across Europe and the Americas, and are expanding within Asia. These programs are uniquely developed based on partner needs and in-kind opportunities and often span multiple phases of the traveler journey.



SHOPPING AND BOOKING





BRAND USA TRAVEL WEEK, CEO SUMMIT, AND MEDIA FORUM U.K. & EUROPE

Brand USA Travel Week U.K. & Europe is Brand USA's premier annual trade show, bringing together U.S. destinations, attractions, and industry leaders to meet with the U.K. and European travel trade and media to build connections, showcase new products and experiences, and work with journalists to create and share news stories. Now in its fifth year, Travel Week will host buyers and media recruited from primary and secondary markets in the U.K., Ireland and mainland Europe.

Travel Week U.K. & Europe has been expanded in recent years with the addition of two concurrent events:

Brand USA CEO Summit U.K. & Europe brings together leadership from destinations and attractions around the USA and provides an opportunity to learn best practices from peers, engage in exclusive sessions with industry leaders from aviation to media, and participate in networking opportunities.

Brand USA Media Forum U.K. & Europe offers U.S. exhibitors the opportunity to conduct pre-scheduled, matchmade meetings with consumer and trade media to share the latest destination stories and seed press trips, as well as enrichment and networking opportunities similar to Travel Week.

New to Travel Week in FY2024 is the addition of the **Brand USA RTO Summit**, which brings 12 receptive tour operators (RTOs) to Travel Week to meet with buyers for up to 15 mutually matched, pre-scheduled appointments. This new program allows Brand USA to triple the number of RTOs participating in Travel Week, leveling the playing field for RTOs, opening up additional appointment books for destinations, and satisfying buyers' interest in meeting with receptives.

Together, Brand USA Travel Week, RTO Summit, CEO Summit, and Media Forum provide the industry a valuable opportunity to discuss trends, challenges, and innovations, and drive future visitation to the United States. This carefully curated, highly programmed week of industry engagement showcases the USA as a must-experience destination and strengthens the bond between U.K. and European travel trade and U.S. destinations.

COOPERATIVE MARKETING ACTIVATION PROGRAMS

Brand USA recognizes how important booking and activation metrics are for our partners to demonstrate success. For this reason, in FY2024 we will offer a number of programs that include activation KPIs such as room nights, flights, and/or booking revenue. Additionally, Brand USA has partnerships with key global media groups that offer quick-to-market, flexible opportunities to reach potential travelers seeking to book trips to the USA. With exclusive value, we further amplify our international reach with these affinity partners: Adara, Expedia, Hotelbeds, LastMinute, Sojern, and Tripadvisor.

ONLINE TRAVEL AGENCY (OTA) CAMPAIGNS

Travelers searching on OTA platforms are actively engaged in the shopping and booking phases of their travel journey. Brand USA works with OTAs to ensure that the USA is present in those influential moments. OTA campaigns are typically included as part of a larger brand advertising effort that connects messaging from inspiration to booking, but in FY2024 we will expand those efforts to entice visitors who might be exploring competitor destinations.

SALES MISSIONS AND B2B EVENTS

Brand USA coordinates and facilitates the business-to-business engagement of the U.S. tourism sector with the key travel trade in a number of core markets. We provide the forum for destinations and businesses to meet with leading in-market travel trade providers to build, strengthen, and maximize their business relationships in order to expand U.S. product offerings. For FY2024, we will offer sales missions to the following markets: Australia, Brazil, Canada, Colombia, India, and Mexico.

GLOBAL MARKETPLACE & INTERNATIONAL PAVILION

Global Marketplace is a virtual platform designed to connect the U.S. travel and tourism industry with a global network of qualified travel trade and media. The platform contains Brand USA's latest market information in a highly accessible format and facilitates one-to-one business meetings between U.S. travel organizations and international travel trade and media.

Global Marketplace was an invaluable resource while in-person meetings were not possible due to COVID. Now, with most people conducting meetings both

in-person and online, Global Marketplace is evolving to reflect those patterns and the new reality of hybrid meetings. For FY2024, Global Marketplace will continue to provide the latest educational content and market research through the International Pavilion and provide a user-friendly "one-stop shop" for exhibitors looking to expand their international presence. We will also continue to provide a platform where U.S. suppliers and international buyers can connect via Brand USA-maintained directories.



TRAVEL TRADE PARTNERSHIPS

A key objective in Brand USA's trade strategy is to create opportunities for U.S. stakeholders to engage in international B2B relationships and make informed decisions about their resource allocation for international promotion. The travel trade represents the sales channels through which international consumers access and regularly rely on booking their trips or components of a trip. These channels range from brick-and-mortar retail travel agencies to tour operators to OTAs, wholesalers, airlines, and more. Many international overseas visitors rely on trusted third parties especially for long-haul travel (travel from outside their immediate continental location) as the trade provides destination expertise, a one-stop contact for all vacation needs, a value for money price-point, and added peace of mind for what is often a multi-week vacation.

Post pandemic many markets continue to see a strong demand for travel booked via travel agents and third-party companies. The U.K.'s Association of British Travel Agents (ABTA) Travel Trends Report 2023 showed that 36% of travelers are more likely to book with a travel professional now than before the pandemic. The top reasons for booking with a travel professional were the security of a package holiday (45%), accessing up-to-date advice (38%), and good value for money (31%).

For FY2024 Brand USA's travel trade engagement strategies will combine working with international teams in 17 market regions to ensure the global travel trade communities have the content, resources, and partnerships to drive visitation to the USA and inspire, promote, and sell the United States with confidence. Effective tools to do this include:

- The USA Discovery Program, an online travel agent training program which will undergo a major platform renovation and relaunch in FY2024.
- Virtual educational webinars
- In-person agent trainings
- Trade events including film screenings of Brand USA's giant screen movies
- Product and itinerary development programs

Collaboration with key global tour operators is essential for Brand USA to maintain and strengthen its presence in the core markets. We focus on broadening and deepening the breadth of the USA product being sold in the overseas markets and employ a set of key tactics which include developing creative and integrated campaigns with top tour operators across

their platforms. These campaigns reach a highly targeted international consumer and also showcase new products and lesser-known destinations that capture the true diversity of the U.S. destination. In addition, Brand USA will work with industry partners to facilitate and coordinate the product familiarization trips for product developers and business managers at top tour operator companies.

Finally, Brand USA's groundbreaking MegaFams are back in full force. These are agent educational trips organized in conjunction with major airline and U.S. partner destinations. We host top selling agents from a selected market to experience several distinct itineraries that explore a range of both iconic U.S. destinations as well as discovering less familiar destinations. Participants then come together for a grand finale to share their stories and experiences in one location. We will host our first Canada MegaFam in FY2024.



TOURISM EXCHANGE USA

Tourism Exchange USA is a B2B digital tourism marketplace that facilitates the real-time exchange of live inventory between suppliers (tourism businesses based in the USA) and distributors (in-country tour operators, travel agencies, OTAs) for worldwide distribution. Having just launched in the USA, building supplier and distributor awareness of the marketplace is critical to its future success. In the coming year, Brand USA will help inform and educate U.S. destinations and travel businesses and in-market distributors about the benefits of the exchange with the intent to increase

utilization of the B2B product exchange. Significant focus will be placed on lesser-known destinations and minority-owned, small, and rural businesses that historically have not had affordable or feasible opportunities to promote their products to international travelers.



M.I.C.E. (MEETINGS, INCENTIVE, CONVENTIONS, AND EVENT) TRAVEL

In FY2024, Brand USA will apply resources and attention to further explore opportunities within the M.I.C.E. travel market in an effort to develop an integrated strategy to support our partners' international needs in M.I.C.E. The first step will be to develop a strategy that

elevates the USA's presence and support in key trade shows and events, as well as provide additional value to existing exhibitors and find ways to lower barriers of entry to allow new exhibitors to participate.



MARKET OBJECTIVES

In FY2024 Brand USA will deploy a global marketing strategy that has a localized approach by market. While we leverage our marketing power to be present across the most critical phases of the traveler journey, we take a market-specific strategic approach for our activities within each country. We will deploy a unique set of marketing tactics in 17 market regions to reach and persuade international travelers to travel to the USA.

We have established market objectives based on the unique opportunities in each of our key markets that together, have immense strategic potential. Local relevance is an important factor in the execution of our marketing activities, which is why we approach each market with messages that are tailored to the local languages and cultural nuances of each of our target markets.

In alignment with our overarching FY2024 business objectives, Brand USA will pursue six global market objectives in the coming year:

- 1 Increase visitation and frequency of visits.
- 2 Grow U.S. market share.
- 3 Disperse travelers to multiple destinations across the USA.
- 4 Increase traveler spend.
- 5 Strengthen the brand presence of the USA as a travel destination.
- 6 Improve perception of the USA as a travel destination.

		OBJECTIVES					
		Visitation		Spend		Perception	
MARKETS		Increase Visitation / Visit Frequency	Grow Market Share	Destination Dispersal	Increase Traveler Spend	Strengthen Brand Presence	Improve Brand Perception
North America	Canada	✓		✓			
	Mexico	✓			✓		
South America	LATAM (Argentina, Ecuador, Peru, Chile, Colombia)					✓	
	Brazil			✓	✓		
Europe	United Kingdom			✓			✓
	Ireland			✓			
	DACH Region (Germany, Switzerland, Austria)			✓			✓
	France	✓			✓		
	Spain			✓		✓	
	Italy			✓	✓		
	The Nordics (Denmark, Norway, Sweden, Finland, Iceland)		✓				
	Benelux (Belgium, Netherlands, Luxembourg)		✓				
	Australia / New Zealand			✓			✓
Asia/Pacific	South Korea	✓		✓			
	Japan			✓			✓
	India	✓			✓		
	China	✓					✓

PRIORITY MARKET SNAPSHOTS

Successful execution of a global marketing strategy requires more than repeating the same tactics across all markets. It necessitates market intelligence, data-led insights, and a customized approach in order to be relevant within each market. Brand USA regularly

conducts in-market research to monitor potential trend shifts, traveler behaviors, and identify strategic opportunities. The market snapshots below outline high-level insights, opportunities, and challenges within markets that deliver the majority of visitors to the USA.

AUSTRALIA & NEW ZEALAND

The pandemic has had a lingering impact on the Australian travel industry, stunting visitation recovery to the United States. COVID layoffs combined with an already tight labor market has led to a dichotomy of travel agent expertise - the highly experienced agents who made it through the pandemic, and a class of completely new agents with little to no experience in travel. Furthermore, product supply chains heavily impacted during the pandemic are being further disrupted by technological advances, consolidation, and diversification.

Visitation from Australia to the United States is expected to surpass pre-pandemic levels in 2025, while visitation from New Zealand to the United States will rebound one year earlier in 2024. Additionally, New Zealand's air service has fully recovered to 2019 levels, but Australian seat capacity is lagging far behind. About 60% of visitors from Australia and New Zealand only visit one state on their trips to the United States, presenting an opportunity to increase both destination dispersal and multi-destination visitation.

BRAZIL

The United States is a popular vacation destination for Brazilians and is expected to represent 28% of total Brazilian outbound travel next year. Brazilians express strong positive sentiment towards the United States, by providing high net promoter scores and with 45% of survey respondents expressing a likelihood to visit in the next 12 months.

As Brazil is not a visa waiver country, visa wait times present a challenge in this market, slowing the expectation of visitation recovery to 2025. While family vacations remain the top travel segment for Brazilians, niche travel experiences like sports, wellness, outdoors and nature, culinary, concerts, and cruising are becoming more prevalent, providing opportunities to highlight many other destination experiences across the USA.



CANADA

Inbound traffic to the United States is expected to surpass pre-pandemic levels by 2024 with over 21 million Canadians visiting the USA. The United States is a popular vacation destination and is expected to represent 59% of total Canadian outbound travel next year. However, U.S. market share of outbound Canadian travel has decreased 11 percentage points since 2000 and recent data shows that Canadians feel that they have been to the USA before and desire other international adventures. Canadian travelers are sensitive to currency exchange rates and believe that the USA has become an expensive vacation destination. There is an opportunity to play into this by emphasizing the proximity of the United States to Canadians, promoting shorter but more frequent trips for long weekends and events, and leaning into budget-conscious travelers with multi-destination road trips.

FRANCE

Visitation from France to the United States is expected to surpass pre-pandemic levels by 2025. Air service to the USA has already returned to 2019 capacity. The United States is projected to capture 11% of France's long-haul travel in 2024, slightly short of the 12% peak market share captured in 2015. Even though French travelers typically select French speaking vacation destinations due to their moderate proficiency of the English language, there is an opportunity for the USA to lean into our one-of-a-kind pop culture to pique interest and increase visitation. Over the past several years, the booking process has transitioned away from trade-supported to primarily (90%) consumer-direct, making consumer marketing a priority for this market.



KINGS RIVER FALLS, ARKANSAS



RHODE ISLAND

CHINA

Visitation from China is not expected to return for several more years. Recovery remains slow with airline seat capacity severely lagging behind other markets at 14% of 2019 levels, which equates to about 20 flights per week. Brand perception of the United States is low, with almost half of survey respondents expressing a neutral or negative attitude toward the country. Additionally, travelers are heavily influenced by news stories from the USA highlighting the need to build positive brand awareness with Chinese travelers.

GERMANY

The USA is a top long-haul destination for the German market despite a projected five percentage point dip (pp) in market share between 2022 and 2024 (from 22% to 17%). According to surveys conducted with European travelers, Germans have a lower likelihood to visit the USA compared to other origin markets in Europe likely due to the perception of the USA as an expensive vacation destination, a desire to visit other countries first, and a fairly low net promoter score.

German travelers love the sunshine and exploring the great outdoors. In the last couple of years, travel booked through specialist tour operators has increased, presenting an opportunity to promote multi-destination visits, especially with more affluent travelers. Visitation from Germany to the United States is expected to surpass pre-pandemic levels by 2025 and pre-pandemic seat capacity is expected to return fully in 2024.

INDIA

India is leading travel recovery within Asia. Visitation from India to the United States has already surpassed pre-pandemic levels. Air capacity will recover next year and connectivity will continue to increase with substantial new equipment investments made by Air India, adding several new one-stop routes to the USA through the Middle East and Europe.

Indian travelers express an extremely positive attitude towards the United States and have a high (over 30%) likelihood to visit. Indian travelers are affluent and economically optimistic, presenting an opportunity to focus on luxury travel in the United States and increase travel spend.

JAPAN

Visitation from Japan is not expected to fully recover until 2026, even though airline seat capacity will likely recover at a quicker pace. Japanese travelers are very risk averse and sensitive to price and currency exchange rate fluctuations. Likelihood to visit the United States among Japanese travelers fluctuates year over year, but the increase of low-cost carrier options from Japan to the USA will support recovery by providing more cost-effective travel options.

Japanese travelers primarily visit Hawaii and Guam, presenting an opportunity to increase awareness of and visitation to the continental United States. Perception of the United States is low, with a large number of survey respondents expressing a neutral attitude toward the country—highlighting the need to build brand perception with younger Japanese travelers. The Japanese are passionate about baseball—especially fresh off their World Baseball Classic win—and MLB game-viewing tours have become very popular among Japanese travelers.



MEXICO

The United States is an extremely popular vacation destination for Mexican travelers, with market share projections estimated at around 86% of total Mexican outbound travel in 2024. Visitation from Mexico to the United States is expected to surpass pre-pandemic levels by 2025, even though airline seat capacity is now 50% greater than what was available in 2019.

Travelers from Mexico tend to be younger, predominantly millennials and members of Generation X followed by a growing segment of Generation Z travelers. Affluent Mexican travelers splurge on luxury travel experiences and love to travel for passion points, like music and major sporting events, creating an opportunity to increase visitation frequency for specific events and experiences. However, longer visa wait times in this market may present a challenge to encourage quick trips to the USA.



UNITED KINGDOM

The U.K. is the top overseas market delivering travelers to the USA. While visitation and airline seat capacity from the U.K. to the United States are both expected to surpass pre-pandemic levels by 2024, we have seen a drop in market share of outbound U.K. travel (10pp since 2000) and a decrease in traveler intent to visit (five pp since 2019). This is likely due to brand perception challenges in this market, with data showing increased desirability to visit other places, perception that the USA has become an expensive vacation destination, and a feeling that travelers have “been there before.”

U.K. travelers desire package protection, expert advice, flexible booking and payment options, and value for money, making the U.K. travel trade a very important part of their planning and booking process. Many U.K. travelers only visit one state on their trip to the United States, creating an opportunity for Brand USA to work with in-country trade to increase destination discovery beyond what U.K. travelers expect. Peak travel times include the Easter holiday along with the summer months of July and August for family travel.

FY2024

SUMMARY BUDGET



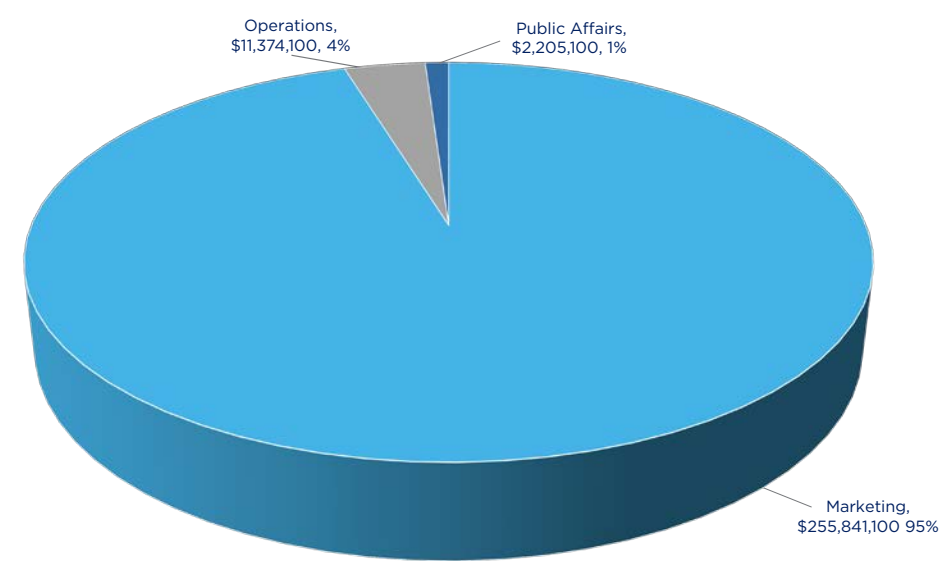
MINNEAPOLIS, MINNESOTA



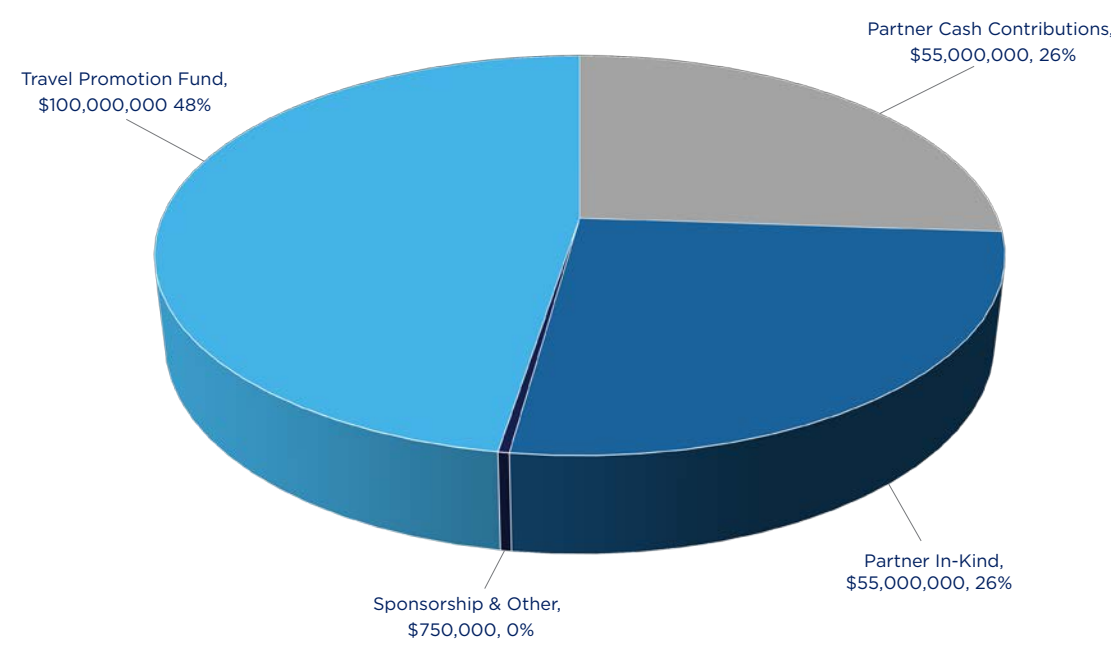
RED ROCKS AMPHITHEATRE,
DENVER, COLORADO

SUMMARY BUDGET

FY2024 EXPENSE BUDGET



FY2024 REVENUE BUDGET



BUDGET ITEMS OVER \$450,000

CONTRIBUTOR	DESCRIPTION	BOTTOM RANGE	TOP RANGE
Alchemia	In-market Mexican trade representation, event management, and public relations	\$750,000	\$1,300,000
Ariadne	Global digital, TV, OOH, and radio media	\$2,700,000	
Aviareps	In-market Brazilian and Japanese trade representation and event management	\$1,000,000	\$1,600,000
Edelman Miami	Global social media management and public relations	\$3,000,000	\$4,200,000
Etc. Venues County Hall	Event space and London activation	\$550,000	\$600,000
Euronews	Production and sponsorship of distributed content	\$800,000	
Expedia	Global digital media	\$1,350,000	
Farragut Center c/o Borger Management	Office space	\$1,200,000	
Gate 7 Pty Ltd	In-market Australian trade representation and event management	\$1,250,000	\$1,750,000
Hills Balfour Limited	European trade representation, event management, and public relations	\$2,500,000	\$3,750,000
Hylink USA	In-market Chinese trade representation, social media community management, digital development, and media planning and buying	\$750,000	\$1,500,000
LG	Global digital and connected TV advertisements	\$1,250,000	
Miles Partnership LLP	Partner engagement program support, development, and distribution of Brand USA's Inspiration Guide	\$2,000,000	\$4,000,000
R&R Partners	Global media planning and buying services	\$2,250,000	\$5,000,000
Sartha Marketing	In-market India trade representation, event management, and public relations	\$750,000	\$1,300,000
Spark	Creative branding and strategy	\$2,250,000	\$9,500,000
Tourism Exchange USA	National license	\$3,500,000	
U.S. Travel Association	IPW and ESTO presenting sponsor agreement	\$1,800,000	

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.

BRAND USA LEADERSHIP AND BOARD OF DIRECTORS

SEATTLE, WASHINGTON

BRAND USA

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BOARD OF DIRECTORS

Brand USA is governed by an 11-member Board of Directors appointed for a maximum of two consecutive three-year terms by the Secretary of Commerce in consultation with the Secretary of State and the Secretary of Homeland Security.

As required by the Travel Promotion Act as amended, all members of the board are United States citizens and are either current or former chief executive officers, chief financial officers, or chief marketing officers or have held equivalent management positions.

Members of the board have leadership expertise in specific sectors of the travel industry including: hotel accommodations; restaurant or food service; small business or retail; travel distribution services; attractions or recreation; state-level tourism offices; city-level convention and

visitor bureaus; commercial or private passenger air; land or sea transportation; and immigration law and policy. At least two members of the board are audit committee financial experts. In addition, at least five members of the board have expertise in international travel promotion or marketing broadly representing various regions of the United States.

As provided for in its charter, the Governance and Nominating Committee makes recommendations to the board for committee member appointments and selection of the board leadership, including the chair, vice chairs, secretary, and treasurer.

In accordance with the above, at time of publication the following business leaders serve on the Board of Directors for Brand USA.



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CHIEF EXECUTIVE OFFICER,
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AUGUST **2023**

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