

FY25

OBJECTIVES AND BUSINESS PLAN



VisitTheUSA.com

Brand USA

EMERALD PARK, ARKANSAS

ABOUT THIS REPORT

Brand USA submits this business plan for Fiscal Year 2025 (FY25) to the U.S. Secretary of Commerce no later than 60 days prior to the beginning of the fiscal year, per the Travel Promotion Act.



ROUTE 66, ARIZONA

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Over the past 11 years (FY13 – FY23),
Brand USA’s marketing efforts
have generated:

8.7 MILLION
incremental visitors



\$28.8 BILLION
incremental spending



Over 36,800
incremental jobs
on average supported each year



\$8.3 BILLION
in federal, state, and local taxes



Nearly \$63 BILLION
in total economic impact

Source: Oxford Economics

LETTER FROM THE CHAIR OF THE BOARD

Fiscal Year 2025 (FY25) will be a pivotal year for travel and tourism in the United States as international arrivals and spending are forecast to surpass pre-pandemic levels and set new records. Despite relatively low outbound travel from major Asian markets, the USA welcomed nearly 67 million visitors in 2023. In May 2024 alone, these visitors spent a record-setting \$21.6 billion on travel to and within the United States. These are not merely abstract figures; they reflect the very real aspirations of the American people being met.

The coming year is the first of a three-year window through 2027 that contains the twin north stars of the National Travel and Tourism Strategy and Brand USA's current authorization period. The relevance of our nation's destination marketing organization to communities of all shapes and sizes only becomes more manifest every day. Over the past 11 years, Brand USA's efforts have generated nearly 9 million incremental visitors who spent almost \$29 billion. These additional visitors have supported approximately 37,000 incremental jobs and contributed more than \$8 billion in federal, state, and local taxes annually. Approximately half of the jobs supported are outside of core travel sectors, including manufacturing, construction, finance, and retail.

FY25 will also be a time of transition for Brand USA as long-time President and CEO Chris Thompson hands the baton to his successor. Though a bittersweet moment, Fred Dixon is the perfect leader to take the organization to new heights. Brand USA is well positioned to navigate complex global dynamics ahead, leverage emerging innovations, capitalize on global opportunities, and lead the U.S. travel and tourism industry into the future.

Brand USA continues to play a crucial role in maintaining the United States' position as the leading travel destination amid a hyper-competitive global landscape. I am privileged to see this work up close as the team continues to surpass expectations in meeting the needs of the travel industry and the livelihoods that depend on it.

Todd Davidson
Chair of the Board



TODD DAVIDSON
CHAIR OF THE BOARD

LETTER FROM THE PRESIDENT AND CEO

I could not be more honored to take on the role of leading Brand USA.

A career in travel and tourism has demonstrated to me this industry's ability to create economic opportunity and sustain livelihoods. I have seen this power in the statistics and observed it time and again in my own life and in the communities to which I have belonged. From a family property in Tennessee to local tourism boards, multinational attractions, and ultimately our nation's largest, most diverse city, travel has been a force for good as much as in host communities as in visitors' home countries.

I am energized by the chance to continue this work at a national scale, spreading high-value international travelers to more towns and businesses. I will be building upon a significant foundation of success. Brand USA has a well understood role, a refined value proposition, and more than decade of delivering results for the U.S. economy. Despite expected headwinds and challenges, our future is bright.

While we bring forward our Fiscal Year 2025 (FY25) objectives, plan, and budget, we also take a multi-year approach. Destination marketing is about building affinity for a place over time; seeds planted one year may blossom in another. A longer view is therefore essential. You will see Brand USA create new structures, investments and strategies to advance our work, especially around upcoming global sporting events and major commemorations that will put the USA even more in the spotlight. We will also explore our role in innovation and AI, meetings and events travel, visitor dispersal and seasonality, new market development, and more as we advance our work.

There is much opportunity ahead and I am excited to get to work.

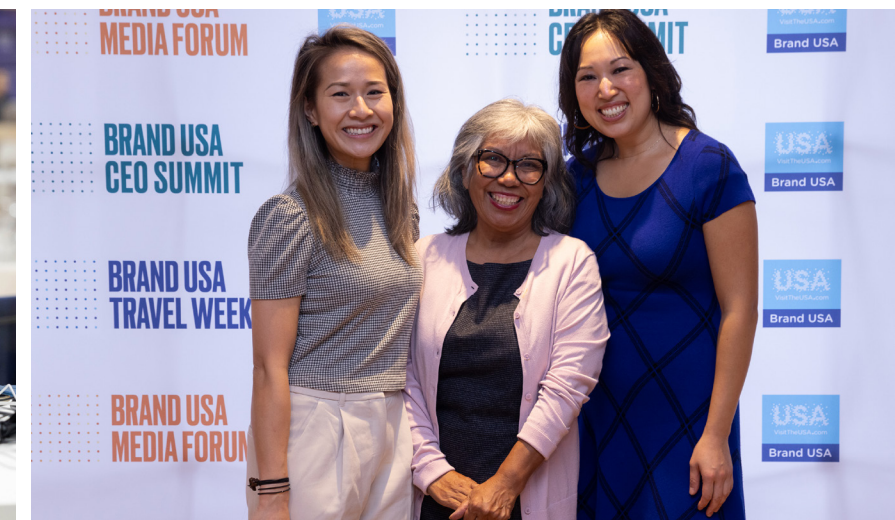
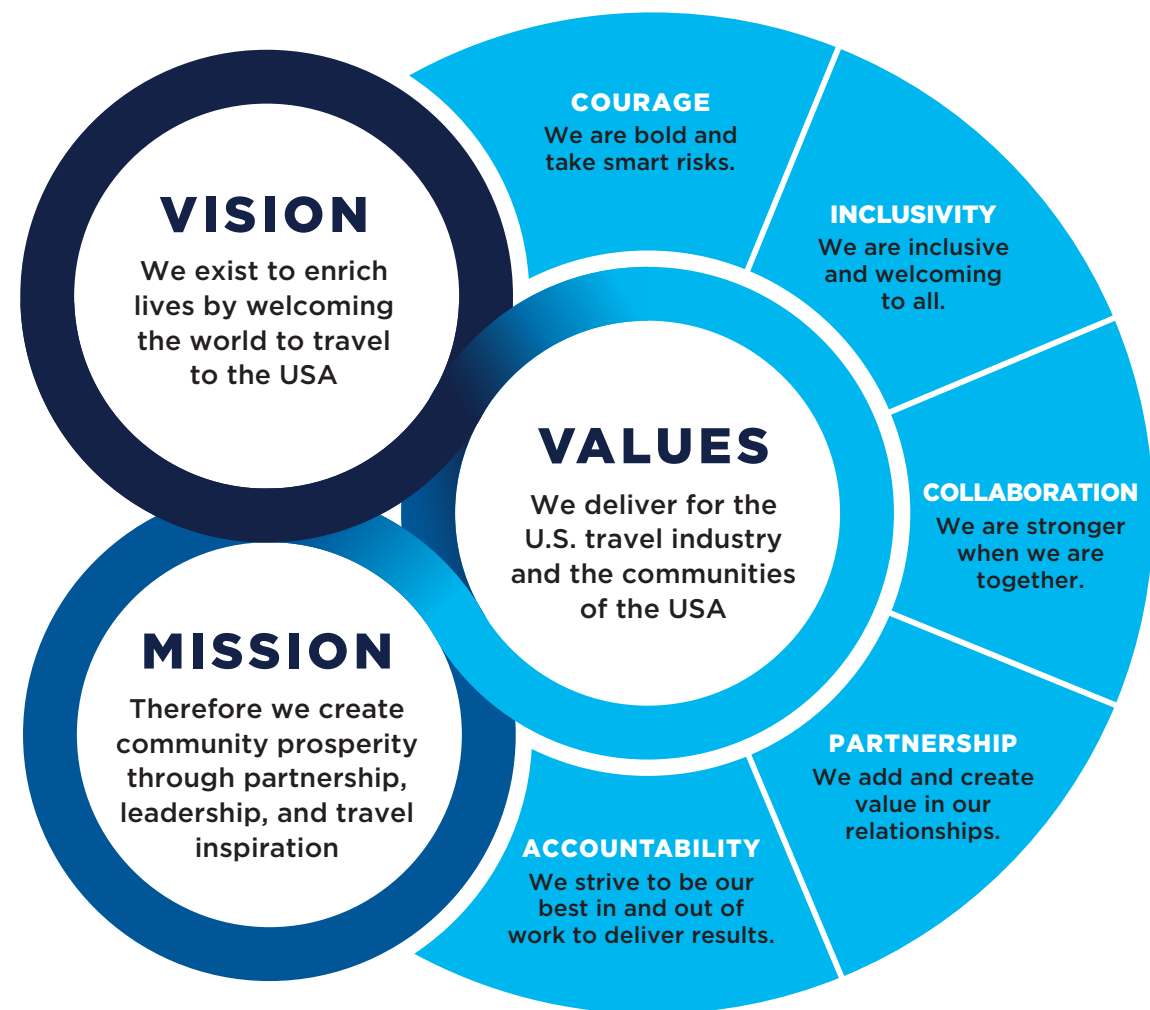
Fred Dixon
President and CEO



FRED DIXON
PRESIDENT AND
CHIEF EXECUTIVE OFFICER

BRAND USA

WHO WE ARE



FY25 THREE-YEAR VIEW

MISSION SAN XAVIER DEL BAC,
TUCSON, ARIZONA

THREE-YEAR VIEW

SETTING THE STAGE

Brand USA sets objectives and outlines a marketing plan and budget to achieve them on an annual basis. This FY25 Business Plan articulates the organization's objectives, activities, and finances for the period of October 1, 2024 through September 30, 2025. Yet consumer decisions do not adhere to fiscal years, and influencing traveler behavior is often a cumulative effort. Keeping in mind consumer behavior, Brand USA has developed a three-year strategic plan (FY25-FY27) to guide long-term initiatives and global marketing infrastructure.

This plan accounts for the National Travel and Tourism Strategy to attract 90 million international visitors who would spend \$279 billion annually by

2027. This whole-of-government, public-private approach establishes a "north star" as the U.S. travel industry moves beyond recovery to lay the foundation for the international visitor economy over the long term.

The path to 2027 begins in forecasting which markets provide the greatest opportunity to supply the increased arrivals to the United States. Evolving traveler behaviors, ease of access, and macroeconomic factors within markets implicate a series of strategies over the next three years to attract those visitors and increase their travel spending in the USA. Understanding these trends will enable the U.S. travel industry to attract high-yield visitors and set new high-water marks.



**More than small towns,
the big smiles.**

From famous landmarks to hidden gems,
there is a USA for every traveler. **Experience it all.**

THREE-YEAR VIEW

SITUATIONAL OVERVIEW

MACROECONOMIC OUTLOOK



Understanding global macroeconomic trends is crucial for the tourism industry, especially as it navigates the complexities of international travel dynamics. Macroeconomic factors such as GDP growth, inflation rates, unemployment trends, and consumer spending directly influence travelers' ability and willingness to spend on international travel. Favorable economic conditions can boost travel demand, increase spending, and support the tourism sector's recovery and expansion. In this context, the following analysis of the global economic outlook provides key insights into the factors that will shape the future of international travel to the USA and the broader tourism industry.

GLOBAL ECONOMIC OUTLOOK

The global economic landscape is expected to experience modest growth in the coming years, underpinned by various economic indicators and projections. According to the IMF's Global Economic Outlook from April 2024, the forecast anticipates consistent global GDP growth of 3.2% from 2024 to 2026, maintaining the same rate as in 2023, followed by a negligible decline to 3.1% in 2027. Emerging and developing countries are expected to drive this growth at a rate of 4.2%, while advanced economies are projected to grow at a more modest rate of 1.7 to 1.8%.

INFLATION AND UNEMPLOYMENT TRENDS

The IMF forecasts a steady decrease in inflation over the next few years, reflecting efforts to stabilize prices. It expects global inflation to drop from 5.3% in 2024 to 3.5% by 2027, showing a continuous downward trend.

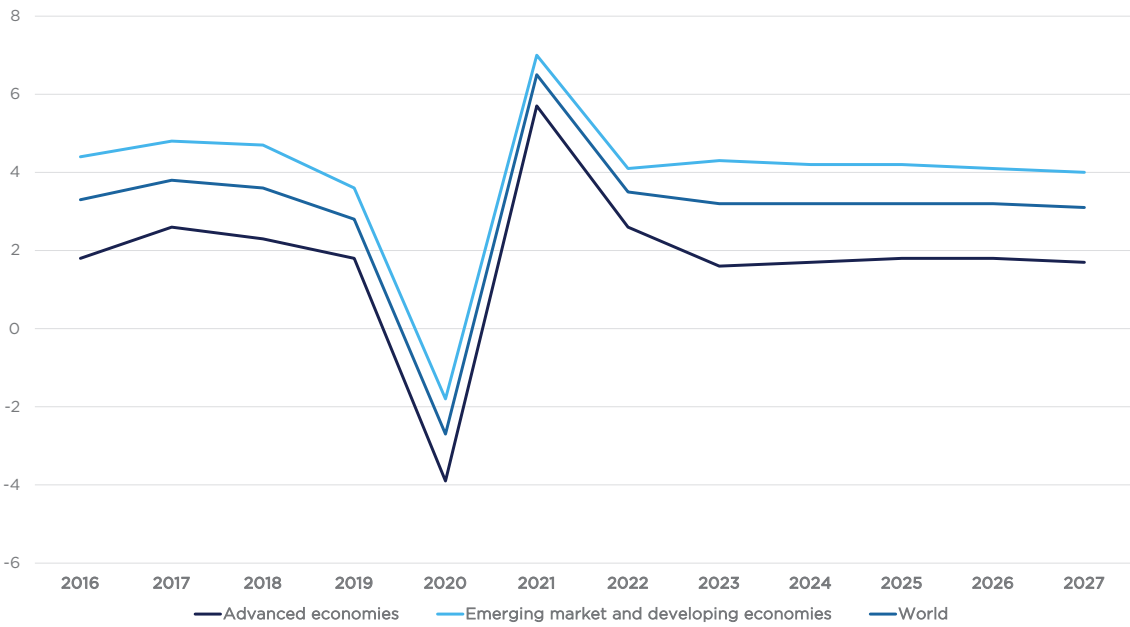


LAKE CHARLES,
LOUISIANA

This reduction indicates progress in managing economic pressures and achieving more stable price levels worldwide. Concurrently, unemployment rates in advanced economies are projected to remain relatively stable from 2024 to 2027. The IMF projects an unemployment rate of 4.6% in 2024, slightly increasing to 4.7% in 2025 and 2026, before falling back to 4.6% in 2027. The Euro area will see a slight decrease in the unemployment rate from 6.6% in 2024 to 6.4% by 2025, maintaining that rate through 2027.

Overall, though inflation trends are encouraging, they still need to stabilize. Inflation is projected to continue declining, but some countries have seen progress towards inflation targets stall.

REAL GDP GROWTH
(ANNUAL PERCENTAGE CHANGE %)



Source: IMF, April 2024



RED ROCKS AMPHITHEATRE, MORRISON,
COLORADO

CONSUMER SPENDING
AND REGIONAL DYNAMICS

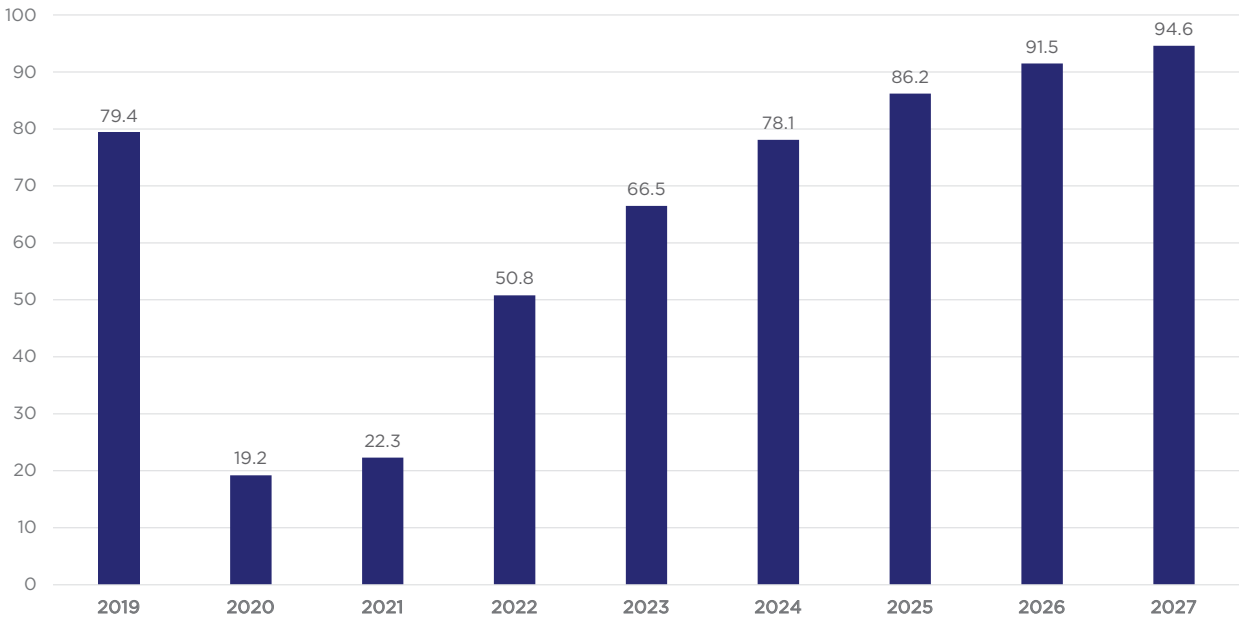
According to Oxford Economics, global consumer spending is projected to grow at a moderate rate in 2025, following two years of abnormally strong growth in 2022 and 2023. Inflation-adjusted consumer spending growth has slowed to 2.6% in 2024 and is expected to remain relatively level at 2.5% in 2025. Asia will continue to be the primary driver of global consumer spending growth. However, China’s contribution is diminishing as the one-time boost from its post-COVID reopening fades. Meanwhile, India’s market is expanding significantly, set to overtake Japan’s market size and become the world’s fourth largest. According to Oxford Economics, the U.S. dollar is expected to remain strong throughout 2025, both against major and emerging currencies.



The United States, as one of the largest inbound travel markets and the number one long-haul destination, is experiencing significant recovery and growth in international visitation across various regions. Total inbound visitation to the

United States is projected to reach 78.1 million in 2024, reflecting a notable increase over 2023 (+16.5%). This growth indicates that visitation to the USA aligns with the global inbound visitation recovery.

U.S. TOTAL INBOUND ARRIVALS
(IN MILLIONS)



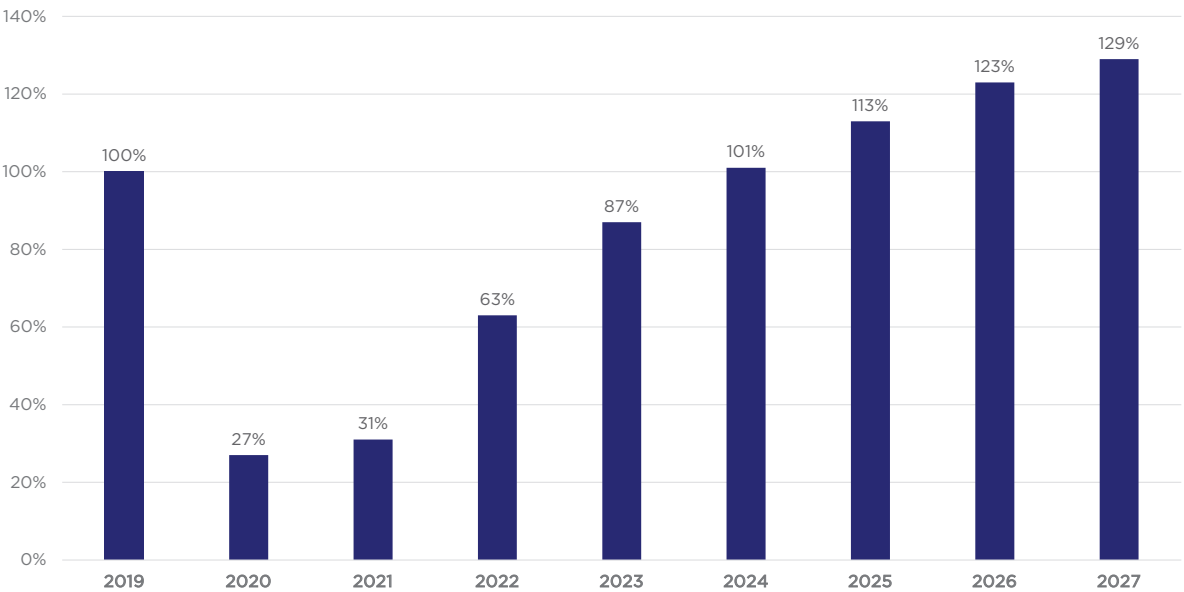
Source: U.S. Department of Commerce/NTTO; Oxford Economics, June 2024

TRAVEL AND TOURISM LANDSCAPE

The travel and tourism landscape is set for robust growth over the next few years, with global inbound arrivals expected to surpass pre-pandemic

levels by 2024 and continue to rise through 2027. Consumers will continue to prioritize travel, contributing to a positive outlook overall.

WORLD INTERNATIONAL INBOUND ARRIVALS
% RELATIVE TO 2019 LEVELS



Source: Oxford Economics, June 2024





SAVANNAH, GEORGIA



MARKET SQUARE,
PITTSBURGH, PENNSYLVANIA

Future projections indicate visitation will surpass pre-pandemic levels by 2025, reaching 86.2 million arrivals and will hit 94.6 million arrivals by 2027. Inbound visitation to the USA over the next three years will vary by region and depend heavily on a series of factors like economic growth, population growth, and ability to travel to the USA.

AFRICA

In 2024, inbound visitation to the USA from Africa is expected to surpass pre-pandemic levels by over 20%, reaching approximately 679,000 visitors, with key markets such as South Africa, Nigeria, and Kenya driving this recovery. Looking ahead to 2027, Africa is expected to contribute around 766,000 visitors to inbound tourism in the USA, with Nigeria and South Africa emerging as the top two visitation markets, expected to reach approximately 167,500 and 136,000 visitors respectively.



MACHIAS, MAINE

ASIA

In 2024, Asian visitation to the USA is expected to rise to approximately 10.46 million, reflecting a strong rebound following the challenges of the pandemic. By 2025, Asian visitation is projected to catch up to pre-pandemic levels, fueled by key markets, such as India, which exceeded 2019 visitation levels last year, and the Philippines and Singapore, which are expected to reach pre-pandemic levels in 2024 and 2025, respectively. Despite initial setbacks, China is expected to surpass pre-pandemic levels by 2026, with Japan catching up the same year. By 2027, forecasts suggest Japan will lead the region in visitation volume with approximately 4 million visitors, followed by China with nearly 3.14 million visitors and India with slightly over 2 million visitors. Visitation from Asia is expected to represent 15% of total USA inbound visitation by 2027.

CARIBBEAN

Visitation to the United States from the Caribbean is expected to show a strong recovery in 2024, with an anticipated 1.9 million visitors, on par with 2019 levels, and is projected to surpass these levels by 2025.

Visitor numbers from the Caribbean are expected to reach approximately 2.3 million by 2027, indicating a steady upward trend. Key countries driving this growth include the Dominican Republic, projected to see visitor numbers increase to 580,000; the Bahamas, expected to slightly exceed 388,000 visitors; and Jamaica, with projections reaching 370,000 visitors by 2027.

CENTRAL AMERICA

Central America's inbound travel to the United States for 2024 is projected at 1.6 million, reflecting a strong recovery. The region surpassed pre-pandemic levels in 2023 and continues to show strong growth in 2024. By 2027, visitor numbers are anticipated to reach around 1.8 million. Significant contributors to this recovery include Costa Rica, with expected visitation of approximately 471,000 travelers by 2027.



PALM BEACH, FLORIDA

EUROPE

Europe is expected to contribute approximately 15.3 million visitors to the USA this year, maintaining its position as the largest overseas, inbound travel region. By 2025, the area is projected to surpass pre-pandemic levels by 7%, demonstrating a robust recovery. This growth trajectory is set to continue, with visitation forecasted to reach around 18.7 million by 2027. Key contributors to this growth include the U.K., Germany, France, Italy, and Spain, which are expected to surpass pre-pandemic levels by 2025.

MIDDLE EAST

By 2024, visitation from the Middle East is anticipated to rebound significantly from pandemic lows, with projections showing a robust recovery trajectory, approaching approximately

914,000 visitors. Key markets such as Saudi Arabia, the United Arab Emirates, and Egypt are expected to drive this resurgence, reflecting renewed interest in travel to the USA from the region. Visitation is poised to continue growing, reaching approximately 1.2 million visitors by 2027, demonstrating a steady upward trend and indicating a return to pre-pandemic levels.

NORTH AMERICA

In 2024, North American visitation to the United States is expected to reach 40 million, marking a significant recovery and surpassing pre-pandemic levels. Canadian visitation is projected to be a major contributor to this growth, with 22 million visitors exceeding pre-pandemic numbers. Mexico’s visitation is forecasted to reach 18 million in 2024, showing a strong recovery trajectory.

Visitation from these two countries combined accounts for half of the total inbound visitation to the USA. Looking ahead, total inbound visitation from North America is anticipated to grow steadily, reaching 47 million by 2027, underscoring its significant long-term growth potential.

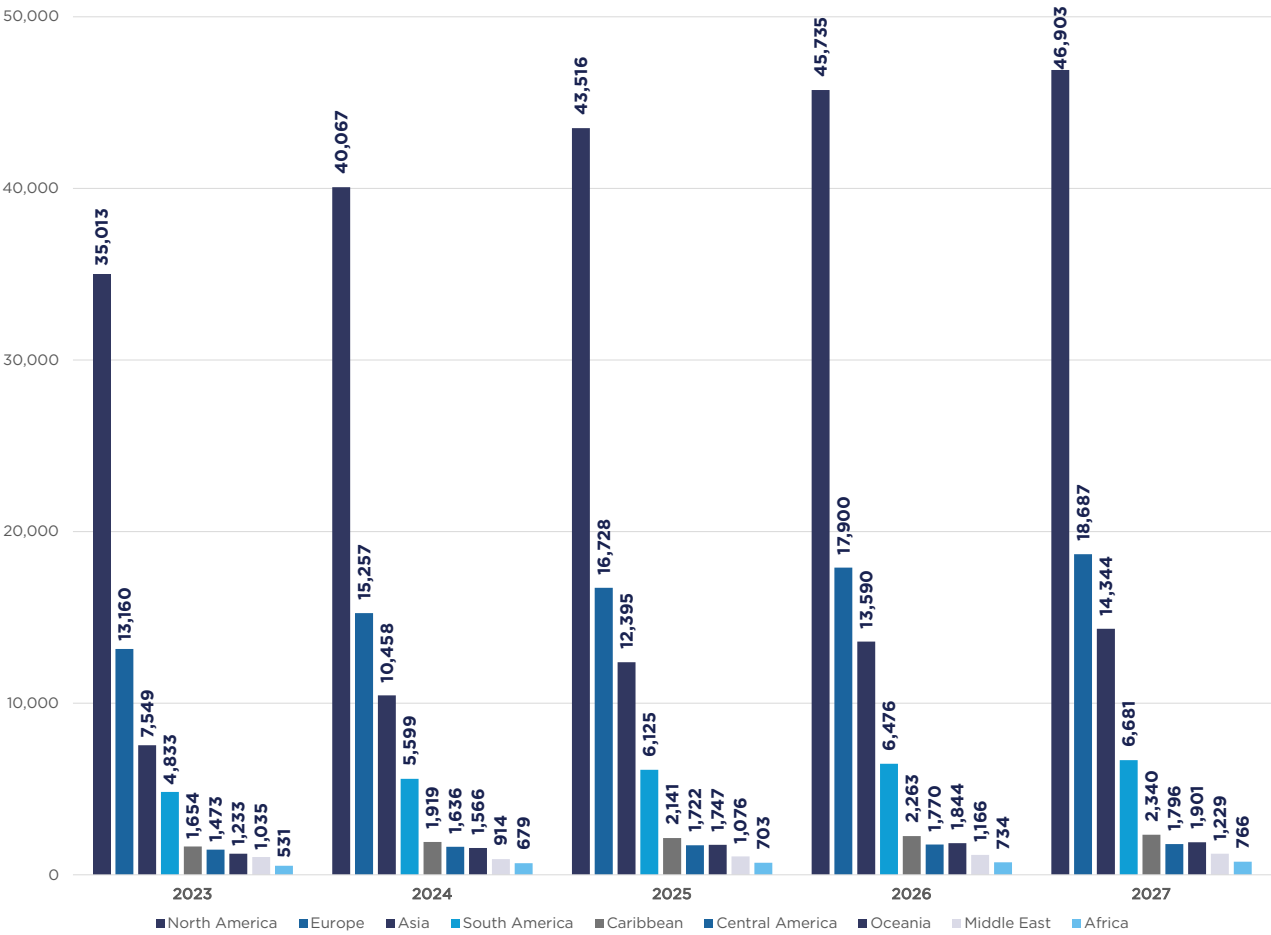
OCEANIA

Oceania’s visitation to the United States is projected to reach 1.57 million in 2024, and surpass its 2019 pre-pandemic levels by 2025. The number of visitors is projected to grow to around 1.9 million by 2027. Leading the growth in visitation are Australia, which is expected to reach approximately 1.53 million visitors by 2027, and New Zealand, with projections of around 361,000 visitors for the same year.

SOUTH AMERICA

South America is experiencing a notable rebound in visitation to the USA in 2024, with arrivals projected at 5.6 million and expected to exceed pre-pandemic levels by 2025. Visitor numbers from South America are projected to reach approximately 6.7 million by 2027. Key countries driving this recovery include Brazil, with projected visitor numbers increasing to 2.5 million by 2027; Colombia, with projections of 1.03 million visitors by 2027; and Argentina, expected to reach 871,000 visitors by the same year. These three countries collectively will account for two-thirds of South America’s inbound visitation volume in 2027, highlighting their significant contribution to the region’s tourism resurgence in the United States.

U.S. INTERNATIONAL ARRIVALS BY REGION
(IN 000S)



Source: U.S. Department of Commerce/NTTO; Oxford Economics, June 2024





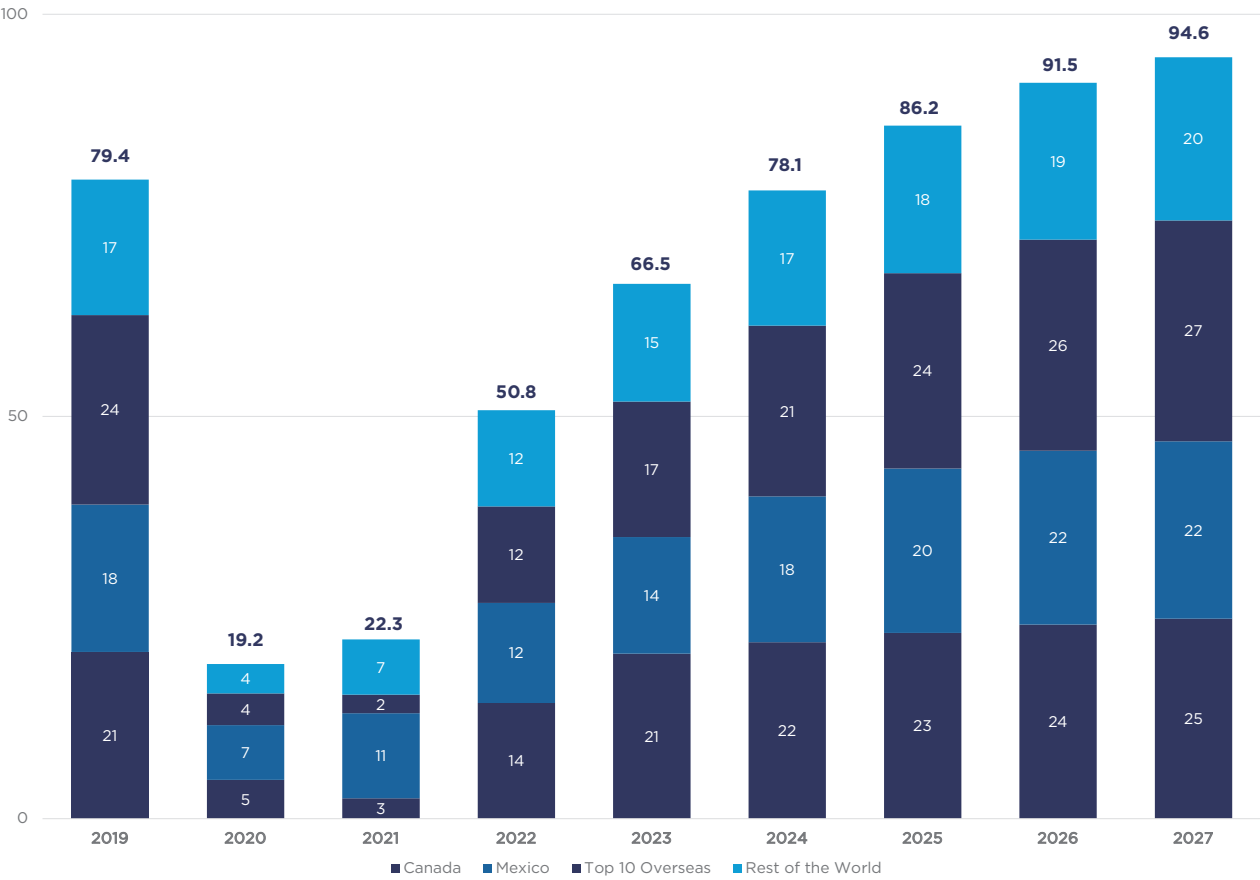
NATIONAL TRAVEL AND TOURISM STRATEGY

The 2022 National Travel and Tourism Strategy (NTTS), released by U.S. Secretary of Commerce Gina Raimondo on behalf of the Tourism Policy Council, mobilizes the full efforts of the federal government to promote the United States as a premier destination, emphasizing the diversity and richness of its communities. It aims to drive economic growth, create quality jobs, and support conservation and sustainability efforts. By drawing on the engagement and capabilities across the federal government, the strategy seeks to stimulate broad-based economic growth in travel and tourism throughout the United States, its territories, and the District of Columbia.

The strategy includes an ambitious five-year goal to boost American employment by welcoming 90 million international visitors annually by 2027, with these visitors projected to spend \$279 billion each year.



U.S. INBOUND TRAVEL (IN MILLIONS)



Source: U.S. Department of Commerce/NTTO; Oxford Economics, June 2024
Note: The top 10 overseas markets are based on actual visitation data from 2023 and include the U.K., Germany, India, Brazil, South Korea, France, Japan, China, Italy, and Australia.

INTERNATIONAL INBOUND VISITATION

The United States welcomed 66.5 million international visitors in 2023, an increase from 50.8 million in 2022. Visitation will need to grow at a compound annual growth rate (CAGR) of 7.9% through 2027 to achieve the National Travel and Tourism Strategy’s goal of 90 million international visitors. Current projections from the National Travel and Tourism Office (NTTO) and Tourism Economics indicate we are on track to meet this goal.

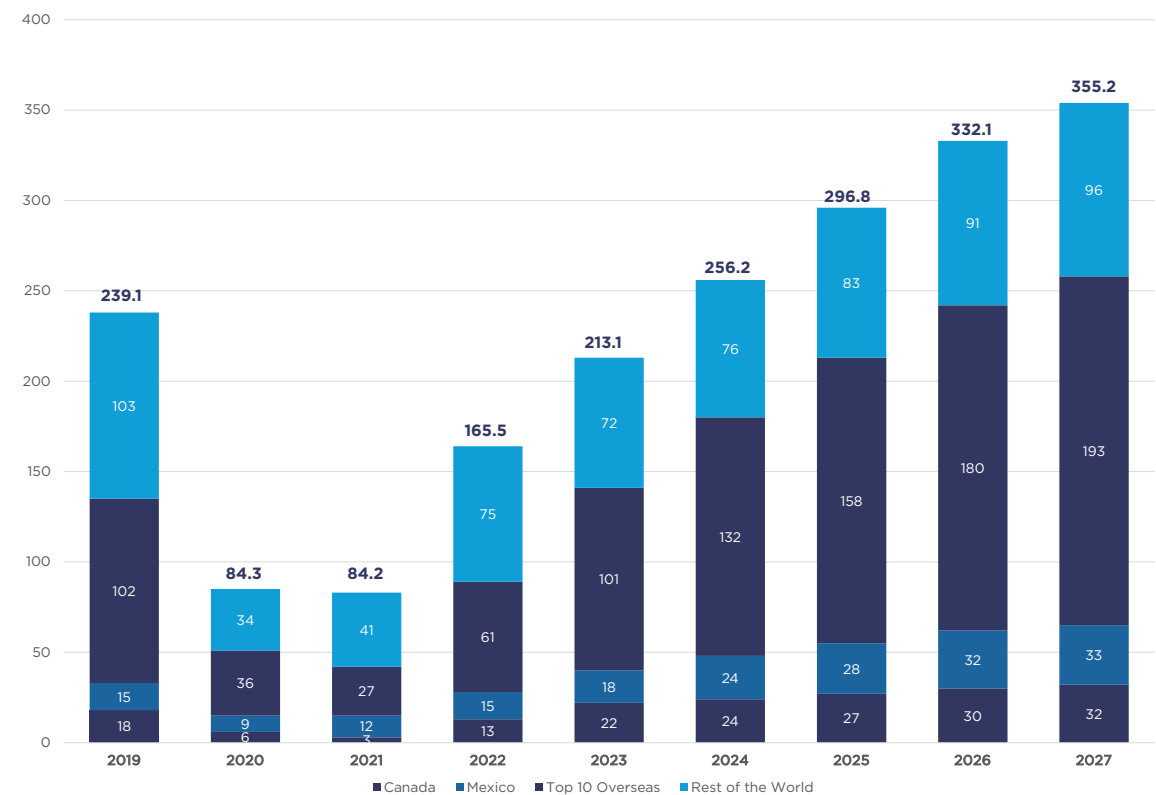
The United States is poised to experience substantial growth in international tourism from 2024 through 2027, primarily driven by the top 12 source markets: Canada, Mexico,

and the top 10 overseas markets. These markets collectively constitute approximately 80% of total U.S. visitation.

Projections indicate that by 2027, approximately 94.6 million visitors to the USA will arrive from these key markets, reflecting a significant increase from previous years. Over the same period, the “rest of the world” is projected to add approximately 10.1 million visitors by 2027. Although individually more minor in impact compared to the top 12 markets, these regions play a vital role in augmenting overall U.S. tourism figures.

This positive trend indicates that we are making steady progress toward fulfilling the NTTS targets, suggesting potential achievement ahead of 2027.

INTERNATIONAL VISITOR SPENDING IN THE USA
(IN BILLIONS USD)



Source: Brand USA estimates based on U.S. Department of Commerce, BEA, and Oxford Economics data
Note: The top 10 overseas markets are based on actual visitation data from 2023 and include the U.K., Germany, India, Brazil, South Korea, France, Japan, China, Italy, and Australia.

INTERNATIONAL SPENDING

In 2023, international visitors spent \$212 billion in the United States, an increase of 28.8% over 2022. Spending will need a compound annual growth rate of 7% to reach the \$279 billion spending target by 2027.

The top 12 markets, comprised of Canada, Mexico, and the top 10 overseas markets, represented 66% of total U.S. spending in 2023, accounting for \$141 billion. These markets are projected to add \$118 billion in spending by 2027, with a CAGR of 16.3%. As a result, their share of total expenditure is expected to increase to 73%.

While these 12 markets account for approximately 80% of total U.S. visitation, their share of spending is comparatively lower at 66%. This discrepancy highlights that these markets significantly drive visitor numbers more than their contribution to overall spending. Notably, the top 10 overseas

markets alone account for nearly 50% of the total spending.

All other markets are projected to add \$24 billion in incremental spending by 2027, with a CAGR of 7.6%.

CHALLENGES AND HEADWINDS

At the macroeconomic level, the continued consumer recovery will depend heavily on the resilience of wage growth and sustained low inflation, which are crucial for rebuilding purchasing power. Inflation poses a risk to demand recovery, acting as both a potential upside and a downside threat. The global economy displays remarkable resilience, with steady growth and inflation declining. However, many challenges remain as identified in the IMF’s April 2024 Global Economic Outlook. Global growth is expected to remain stable through 2025,

driven by stronger activity in the United States, China, and other large emerging markets, despite weaker activity in the Euro area.

The IMF study also highlights concerns regarding the decline in medium-term growth for low-income countries. Structural reforms promoting domestic and foreign investment, increasing fiscal revenues, and improving human capital, particularly in large, young populations, would be helpful steps in these markets. This is especially crucial as the rest of the world ages rapidly, and these measures will help lower borrowing costs and reduce funding needs.

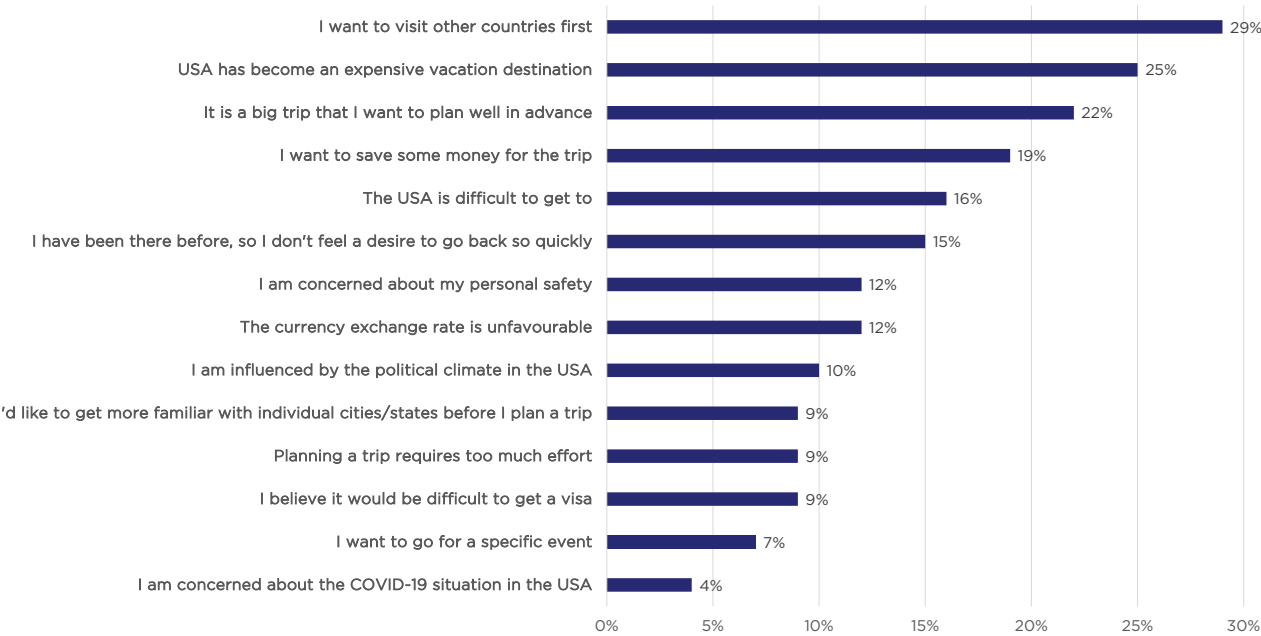
At the level of competition for visitors, the global travel landscape underwent significant transformations during the COVID pandemic, altering traveler behaviors and expectations. For many international visitors, particularly those from long-haul destinations, the United States is perceived as difficult to access. The sheer breadth of options available within the country can delay

visitors nailing down a specific travel experience. Finally, there is the sense among some that they have already experienced what the USA has to offer, or they take for granted its perpetual availability as a destination.

Consumer sentiment toward travel has also evolved post-pandemic, with cost becoming a more critical factor. Although travel expenses have risen, travelers continue to prioritize experiences, especially immersive, culturally distinct experiences. This shift in preference poses a challenge as destinations in Asia, for instance, rise in popularity due to their unique offerings.

The competitive landscape has intensified with emerging destinations aggressively investing in marketing and infrastructure, particularly in the Middle East. This heightened competition necessitates that the USA maintain its historical allure and continuously innovate to meet evolving consumer expectations.

DETERRENTS TO TRAVEL TO THE USA
IN THE NEXT 12 MONTHS



Source: Brand USA/Big Village’s Caravan Omnibus Study
Q: Why is the United States not a likely holiday destination for you in the next 12 months?
Base: Very/somewhat likely to take an international holiday in the next 12 months but it won’t be to the U.S. (N= 6,027)

MULTI-YEAR PLANNING

Brand USA builds upon success year after year in key areas and works to align longer-term strategies with consumer tendencies and behaviors. In FY25, several new projects will help grow and sustain new international visitation to all parts of the country through 2027.

CONSUMER BRAND

The increasingly competitive marketplace for global travelers demands positioning national destination brands in ways that elevate consumer perceptions by accentuating strengths and mitigating barriers. A strong brand identity is a set of overarching parameters that guide consumer advertising campaigns and create a cohesive ecosystem toward long-term objectives.

Brand USA will explore a refreshed consumer brand to enhance the USA's competitive edge and drive greater reach and top-of-mind awareness, increasing travel intent and desirability, and ultimately attributable increases in international arrivals and spending. By presenting the USA as a must-visit destination, a refreshed brand identity would reinforce the message that the USA is more than worth it, enticing global travelers to choose the United States for their next adventure. This exploration will be steeped in

in-depth research into perceptions about the USA among consumers and potential travelers in key source markets as well as their travel behaviors.

A consumer brand exploration would also include an update to consumer-facing digital properties to ensure it flows from the brand identity and delivers the contemporary, user-friendly interface that is crucial to engage modern travelers. The user experience must be intuitive, responsive, and easy to navigate across devices and languages. New technology can enable more interactive elements, such as user-generated content and AI-driven personalization. Real-time updates on travel information and availability will help streamline the process from inspiration to action. And state-of-the-art analytics tools provide valuable insights into traveler behavior and preferences, allowing for continuous refinement of content and marketing strategies.

MAJOR EVENTS

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

Brand USA's marketing programs are built to leverage these moments to drive even more inbound visitation and help realize the full economic benefits of the opportunities. Some cases may warrant additional focus where organization objectives, stakeholder demand, or other opportunities dictate. Brand USA will begin approaching these major events years in advance with specific opportunities in mind.

WORLD PRIDE (2025)

World Pride 2025 in Washington, DC, is poised to be a landmark event, celebrating the LGBTQ+ community globally, and drawing visitors from around the world. This presents a unique opportunity to attract international travelers to the USA, inviting them to experience the rich tapestry of Pride events nationwide. From New York City's historic Pride March to San Francisco's iconic celebrations and even smaller city events like the vibrant Blue Ridge Pride Festival in Asheville, North Carolina, where visitors can explore diverse festivities and feel first-hand the USA's commitment to diversity, equality, and acceptance. The influx of global travelers for World Pride 2025 will bolster tourism in the nation's capital, stimulate economic growth, and foster a deeper understanding and appreciation of LGBTQ+ cultures and communities across the country.

WORLD CUP (2026)

The World Cup is the most significant focal point for global attention, with all eyes on the USA in summer of 2026. The 2022 World Cup in Qatar saw nearly 3.5 million fans and generated \$5 billion in economic impact. Those baseline figures are likely to be larger in the USA with higher-capacity stadiums, greater international connectivity, and better ability to host visitors.

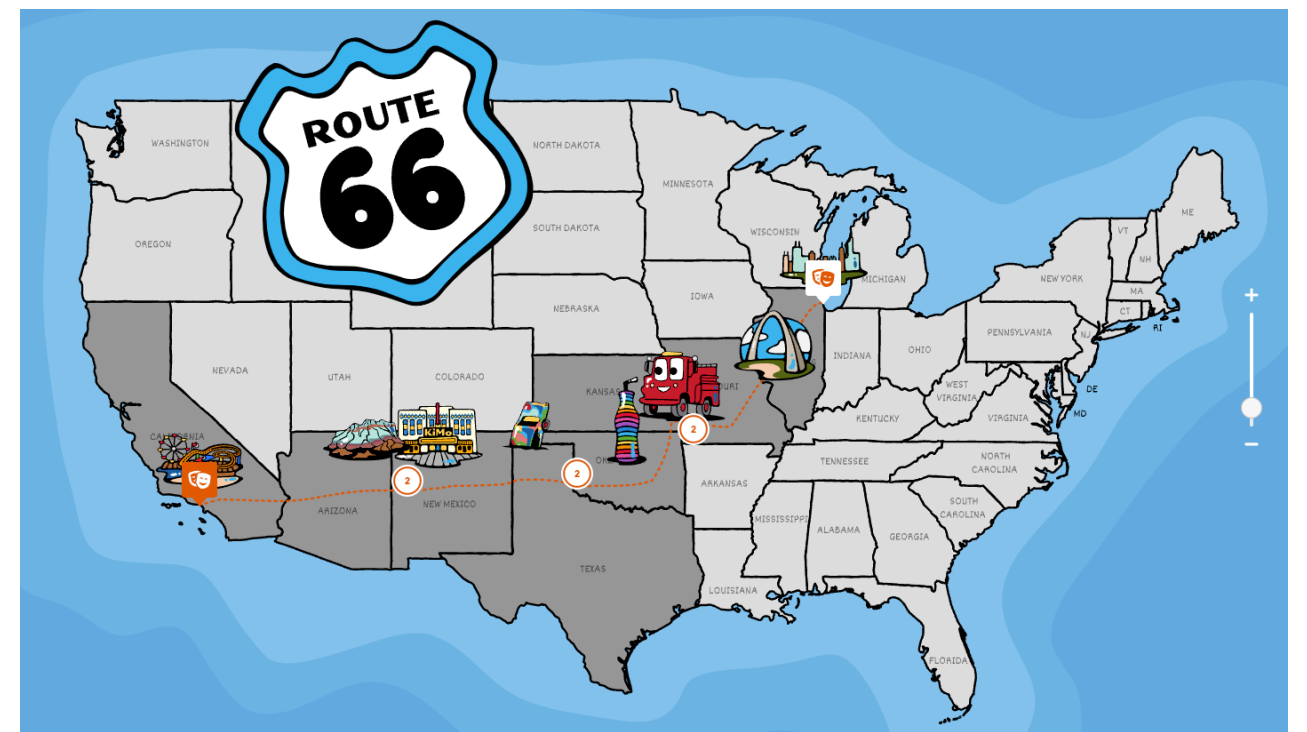
The core objectives are to grow brand affinity, encourage travelers to gain familiarity with experiences in and around host cities, and disperse travelers beyond host cities by driving trip extension.

AMERICA 250 (2026)

The United States of America was founded on freedom. While the 250th anniversary of the Declaration of Independence may be most relevant domestically, the moment represents an opportunity to reinforce the USA as a place where you can be who you want to be and find the travel experiences that are only possible in the USA. The core objective is to reinforce the brand positioning in big, memorable, and distinctive ways.

ROUTE 66 CENTENNIAL (2026)

Road trips have long been a unique aspect of the USA travel experience. The 100th anniversary of this quintessential route across the USA is an opportunity to deliver this story in new and relevant ways. In addition to telling the famed history of Route 66 and inviting visitors to the eight states around it, Brand USA will celebrate the broader idea of USA road trips. The core objective is to educate and inspire travelers about the Great USA Road Trip.



NATIONAL TRAVEL AND TOURISM STRATEGY INTEGRATION

The NTTS recognizes that Brand USA plays a critical role in pursuing the national strategy goals and helping ensure this growth is inclusive and sustained. As the nation's destination marketing organization, Brand USA works closely with the federal government to present a united and welcoming face to the world of travel. Collaborations include communicating travel policies, promoting national treasures, branding sterile facilities, engaging foreign counterparts, and participating in events.

As the industry and government work together to achieve the goals of 90 million visitors and \$279 billion in spending by 2027, Brand USA will refresh and launch new Market the Welcome toolkits for U.S. embassies, consulates, and international arrival halls. A variety of public-private initiatives will continue to bring Brand USA together with its partners across the federal government; for example, the 2024-2025 U.S.-Japan Tourism Year will conclude at the World Expo in Osaka, Japan, having ushered in Japanese participation in Global Entry and many new B2B connections.

MEETINGS AND EVENTS

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

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

Brand USA will continue to refine a value proposition for travel industry stakeholders in the MICE space. This could include leveraging strategic relationships worldwide, building out new tracks within existing trade events, or targeting opportunity sectors and markets.



FY25 OBJECTIVES



SOUTH RIM GRAND CANYON,
ARIZONA

ORGANIZATIONAL OBJECTIVES	GOALS	STRATEGIES	TARGETS
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<p>ESTABLISH AND MAINTAIN THE USA AS THE PREFERRED GLOBAL TRAVEL DESTINATION</p>	<p>Create innovative global marketing initiatives to inspire and sustain visitation</p> <p>Enhance global brand awareness and perception</p>	<ul style="list-style-type: none"> Develop and optimize marketing campaigns tailored to each stage of the traveler journey to drive intent to visit and enhance desirability of the USA as a travel destination Elevate global brand awareness and perception through captivating storytelling and visually appealing content showcasing the diverse experiences the USA offers Leverage strategic partnerships with iconic brands to enhance destination appeal 	<ul style="list-style-type: none"> Intent to visit the USA (+2 percentage points YOY) Brand awareness of the USA as a travel destination (90%+) Positive perception of the USA as a travel destination (65%+)
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<p>CONTRIBUTE TO COMMUNITY PROSPERITY BY DRIVING INTERNATIONAL VISITS AND SPEND</p>	<p>Build a foundation for sustainable long-term growth of the U.S. visitor economy</p>	<ul style="list-style-type: none"> Drive visitation growth and enhance visitor spending from prioritized international markets Expand Brand USA’s market presence in targeted growth markets Drive traveler dispersal to destinations across the USA 	<ul style="list-style-type: none"> Attributable incremental increase in visitation (+30% FY25 over FY23) Attributable incremental increase in visitor spending (+45% FY25 over FY23) USA long-haul market share (13%) Traveler dispersal across the USA (+10% YoY)
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<p>LEAD AND ENGAGE STAKEHOLDERS OF THE U.S. TRAVEL INDUSTRY</p>	<p>Create impactful programs and initiatives that provide value to stakeholders in the U.S. travel industry, supporting their efforts to promote international travel to the USA</p>	<ul style="list-style-type: none"> Develop and maintain robust partnerships with stakeholders across the U.S. travel industry, ensuring high levels of partner satisfaction and engagement to achieve mutual success in promoting international travel to the USA Engage and promote a diverse base of U.S. stakeholders and create opportunities throughout the travel industry to promote U.S. businesses 	<ul style="list-style-type: none"> Partner program retention rate (90%) Partner satisfaction (90%) Develop a U.S. Stakeholder and Business Index
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<p>MAINTAIN EXCELLENT ORGANIZATIONAL INTEGRITY AND REPUTATION, SETTING THE STANDARD FOR THE</p>	<p>Foster a team that is forward-thinking, innovative, and collaborative to drive impactful industry leadership</p>	<ul style="list-style-type: none"> Ensure financial integrity and compliance Enhance Brand USA’s positive industry perception 	<ul style="list-style-type: none"> Overall Brand USA ROI (+24% FY25 over FY23) Compliance and audit (100% compliance) Federal match: secure private funding to match federal contributions (\$100M)
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FY25 MARKETING PLAN

INTRODUCTION

Brand USA targets marketing and promotional efforts according to three fundamental considerations.

First, a multi-year analysis of the opportunity across potential target markets helps direct resources to their best, highest use. Brand USA's market selection takes into consideration a series of factors that evaluate the potential of a market to help achieve its goals and objectives.

Second, research and insights inform key objectives within individual markets. Market characteristics such as familiarity and perception of the USA, traveler behaviors and desires, and Brand USA's past marketing activities lead to varying imperatives.

Third, specific interventions at different phases along the traveler journey (i.e., the consumer path to purchase) aim to reduce barriers that travelers confront at each stage of the journey. From keeping the USA top of mind to simplifying the planning process and driving the urgency to book now, different tactics and messages are optimal for keeping the consumer engaged and moving them toward the next phase of the journey.



BRANT POINT LIGHTHOUSE,
MASSACHUSETTS

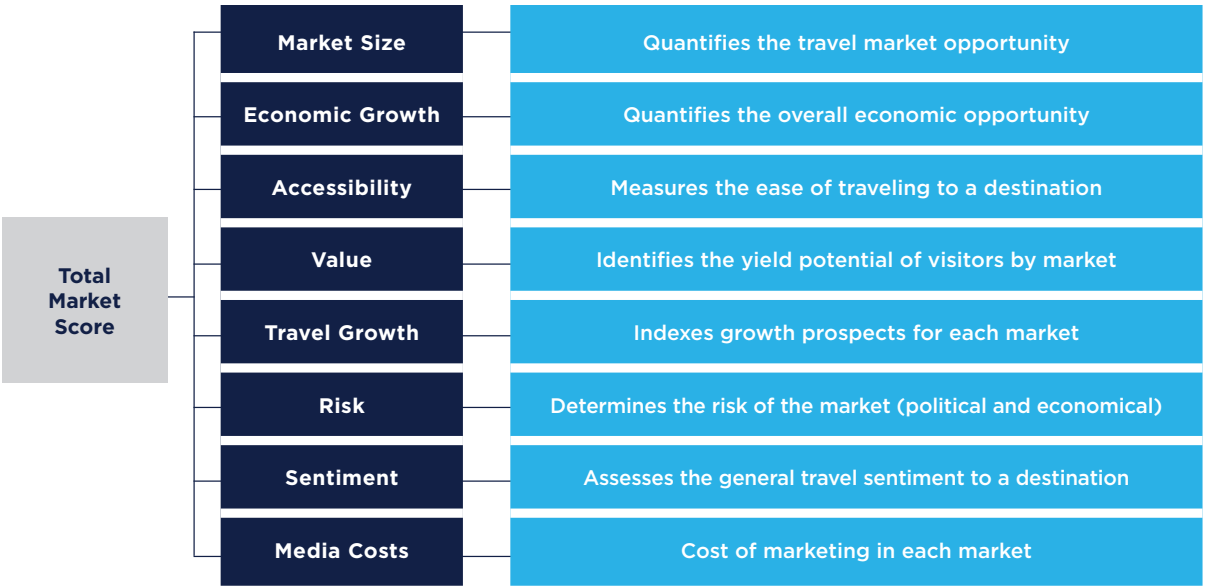


RIVAURE ESTATE VINEYARDS & WINERY,
NEAR LEWISTON, IDAHO

MARKET SELECTION

Brand USA's marketing efforts are intricately aligned with the NTTS goals. Market selection and resource allocation are informed by a data-driven model, which assesses each market's potential based on market dynamics, visitor value, risks, and Brand USA's historical presence and investment in each market. This legacy component considers offices, in-market representation, B2B (travel trade), and B2C (consumer marketing campaigns). Markets are evaluated and ranked based on these factors and categorized into tiers, guiding strategic objectives for the next three years to achieve NTTS goals.

The core of this model includes macroeconomic indicators like market size, growth, and accessibility. Many markets have shown strong GDP growth post-pandemic, though forecasts predict more modest growth for developed economies and favorable prospects for emerging markets. A significant factor affecting travel to the United States is the sustained strength of the U.S. dollar. Unfavorable exchange rates and recent travel price inflation have made U.S. travel more expensive for international visitors. This impact varies by market and local conditions, resulting in different levels of visitor spending growth.



ISLAMORADA, FLORIDA KEYS

Market scores combined with Brand USA legacy identify five categories of overall market strategies:

- CORE MARKETS:** Top performing with a strong Brand USA legacy.
- GROWTH MARKETS:** Strong growth potential and Brand USA legacy.
- INTERMEDIATE MARKETS:** Moderate performance and variable growth with mixed Brand USA legacy.
- EMERGING MARKETS:** Developing with potential and limited Brand USA legacy.
- REMAINING MARKETS:** Low performing with limited potential and no Brand USA legacy.

Core and growth markets include Canada, Mexico, and the nine largest overseas markets, with core markets more advanced in recovery. Intermediate markets, like Ireland, Colombia, and Spain, vary in growth and Brand USA presence. Emerging markets, such as Argentina, Costa Rica, and the Philippines, offer new growth opportunities. Brand USA will monitor the remaining 100-plus markets for new developments and opportunities.

Focus on these five categories allows Brand USA to capitalize on favorable conditions and drive sustained progress toward achieving the national tourism goals.



GREEN MILL,
CHICAGO, ILLINOIS

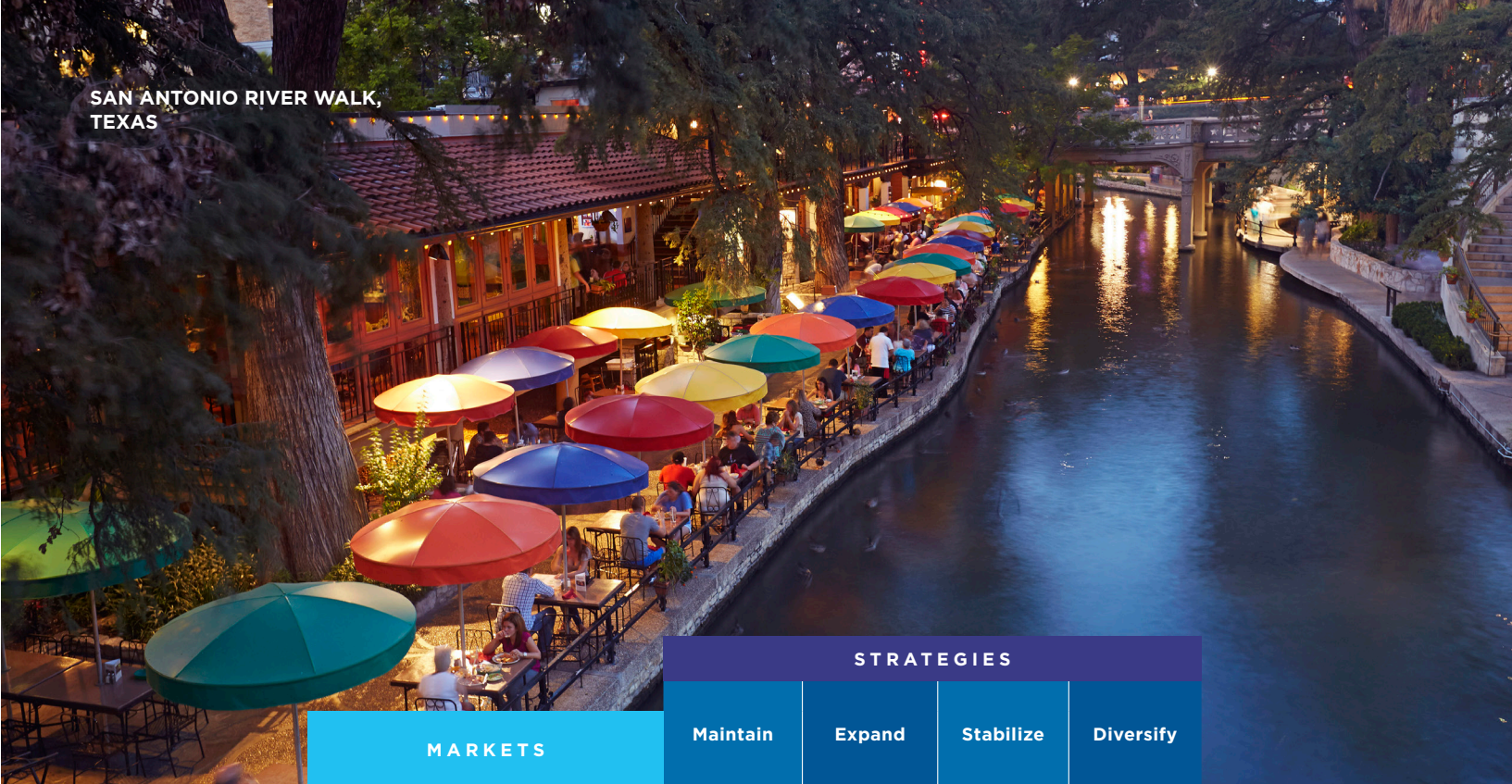
MARKET STRATEGIES

Brand USA's market strategies are based on the five categories below and each market's forecasted annual growth rates. These strategies are essential to guide Brand USA's actions to enhance visitation, spending, and brand equity across different regions and are defined as follows:

- Maintain:** For large Core markets with modest growth rates in 2025, the objective is to maintain and support the current levels of visitation, visitor spending, and brand equity. These high-volume markets require efforts to ensure repeat visits and sustain a positive destination image. Examples include Canada, India, the U.K., Germany, and France.
- Expand:** The objective for Core and Growth markets showing accelerated growth in 2025 is to expand. The goal is to increase visitation and visitor spending, and enhance brand equity by attracting new visitor segments and broadening the destination's appeal. Key markets for this strategy include Mexico, Brazil, China, Japan, and Australia.
- Diversify:** This objective applies to other Growth markets and some Emerging markets with significant expansion potential. The aim is to develop new tourism markets and reduce dependency on existing ones. This will involve exploring new traveler segments and increasing awareness of U.S. destinations. Markets like South Korea (Growth) and Argentina, Costa Rica, and the Philippines (Emerging) show the greatest potential for diversification.
- Stabilize:** The goal for Intermediate markets is to stabilize visitation and spending. These mid-size markets have mixed growth and limited historical investment from Brand USA. The strategy involves maintaining a consistent presence and engagement to retain baseline visitation levels and benefit from changes in visitation patterns and spending behaviors. This requires close monitoring and proactively adapting strategies. Examples include Colombia, Spain, and smaller European markets such as the Benelux region, Ireland, Switzerland, Austria, and the Nordic countries.
- Monitor:** Finally, we will monitor visitation trends and forecasts for the remaining markets, which currently show limited growth potential and are not the best opportunities for resource allocation. We will continue to track changes in their macroeconomic and political climates to develop strategies for those that might move into the Emerging market category.



THE GATEWAY ARCH,
ST. LOUIS, MISSOURI



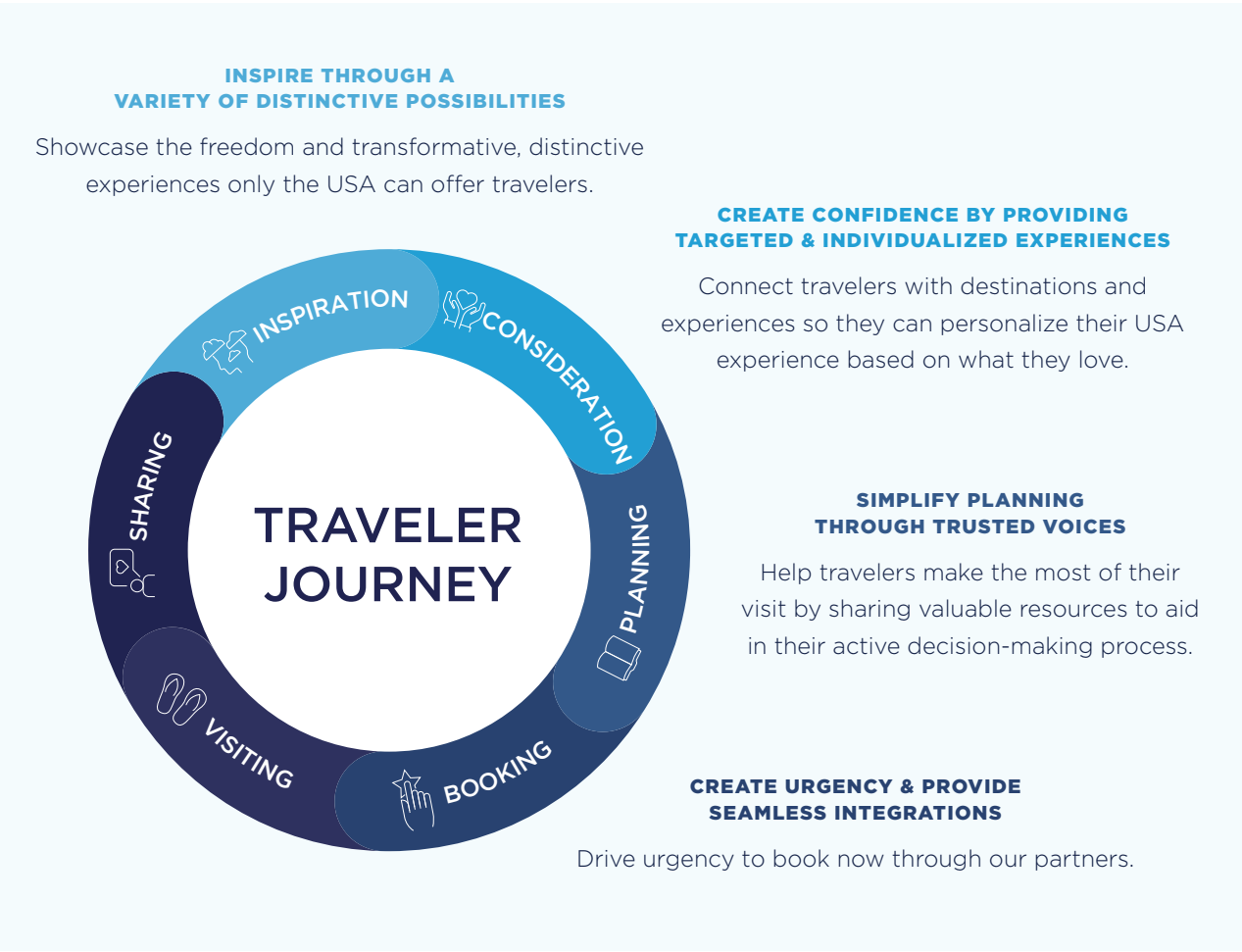
SAN ANTONIO RIVER WALK,
TEXAS

		STRATEGIES			
MARKETS		Maintain	Expand	Stabilize	Diversify
CORE	Canada	✓			
	France	✓			
	Germany	✓			
	India	✓			
	U.K.	✓			
	Brazil		✓		
GROWTH	Mexico		✓		
	Australia		✓		
	China		✓		
	Japan		✓		
	South Korea				✓
INTERMEDIATE	Benelux			✓	
	Colombia			✓	
	Ireland			✓	
	Italy			✓	
	The Nordics			✓	
	Spain			✓	
	Switzerland			✓	
EMERGING	Southeast Asia		✓		
	Argentina				✓
	Peru				✓
	Chile				✓
	Ecuador				✓

MARKETING ACTIVITIES

Brand USA has proven highly effective in influencing consumer perceptions of the country as an international destination and traveler behavior in the form of incremental visitation to and spending in the United States. Broadly speaking, consumers move through defined phases (“traveler journey”)

as they move from general inspiration to active consideration and ultimately to planning and booking a specific set of travel experiences. Brand USA maps marketing programs according to these phases informed by research-based insights into the consumer mindset at each step along the way.



Each phase of the traveler journey calls for a particular set of messages, distribution channels, and timing. Brand USA tailors marketing programs to each market's strategies, consumer insights, and thematic priorities like diversity, accessibility,

and sustainability. Most of these efforts are direct-to-consumer, though some leverage key intermediaries such as the travel trade, media, and other influential channels where consumers invest their attention.

Brand USA provides increasingly localized storytelling and activation options as the consumer moves from high-level inspiration to consideration, planning, and booking. These phases present the ideal opportunity to partner

with stakeholders throughout the U.S. travel industry and in-market distribution and messaging channels. The framework below illustrates Brand USA's layered approach to speak to the consumer throughout the traveler journey.

STRATEGIC MARKETING FRAMEWORK

Traveler Journey	Dreaming	Considering	Planning	Booking	Visiting/ Sharing
Role of Brand	Inspire	Educate & Personalize	Simplify	Convert	Delight
Strategic Approach	Inspire Through A Variety of Distinctive Possibilities Showcase the freedom and transformative, distinctive experiences only the USA can offer travelers.	Create Confidence by Providing Targeted & Individualized Experiences Connect travelers with the destinations and experiences so they can personalize their USA experience based on what they love.	Simplify Planning Through Trusted Voices Help travelers make the most of their visit by sharing valuable resources to aid in their active decision-making process.	Create Urgency & Provide Seamless Integrations Drive urgency to book now through our partners, and reinforce the value of making this decision (it's worth it).	
Marketing Tactics					
Marketing Ecosystem	Brand Marketing & Advertising	GoUSA TV	Tour Operator Co-ops		
	Social Media & Content Creators	Cooperative Marketing	Travel Trade Engagement		
		Earned Media / PR	OTA Campaigns		
		Website / Digital Platforms	Product Development Activities		
		Content Marketing			

INSPIRATION

Inspiration is the initial stage in which consumers think generally about taking a trip—perhaps imagining an experience or a feeling. Brand influence can play a decisive role in the inspiration phase as potential travelers often are not set on a specific destination. Resonant storytelling, beautiful imagery, and other compelling content can move the consumer down the path toward active consideration, planning, and booking.



BRAND MARKETING AND GLOBAL ADVERTISING

A strong brand identity ensures the United States stands out in the fierce competition for global travelers.

This identity is not just about visibility; it is about inspiration through the freedom and transformative possibilities unique to the USA. Brand marketing initiatives capture the imagination of potential travelers by presenting a unified landscape encompassing the USA's diverse landscapes, vibrant cities, and rich cultural heritage.

Brand USA's global brand campaigns leverage traditional media and digital platforms to deliver high-impact visuals, engaging stories, and targeted messaging to evoke a sense of wanderlust. They ensure that when people worldwide think of travel, the USA is immediately within their consideration set, associated with a wide range of distinctive and unforgettable experiences. These efforts also create a platform to deliver more individual messaging in the other phases of the traveler journey while maintaining consistency of the story. And ultimately, brand marketing cultivates a vibrant community of travelers eager to share their experiences and drive sustained interest among their peers.

In FY25, Brand USA will explore a refreshed consumer brand to reflect forward-looking global consumer imperatives and strengthen the United States' presence as a premier travel destination.



Driven by extensive research into traveler perceptions across major source markets and insights into preferences and behaviors, new brand campaigns and a potential brand identity refresh would position the unique value proposition of the USA to global travelers and ensure the nation stands out as the top choice.

A refreshed brand marketing campaign could enhance the USA's competitive edge amidst rising competition from global destination promotion efforts. It would seek to drive greater reach and top-of-mind awareness, increasing travel intent and actual visitation. By presenting the USA as a must-visit destination, these efforts will reinforce the message that the USA is more than worth it, enticing global travelers to choose the United States for their next adventure.

SOCIAL MEDIA AND CONTENT CREATORS

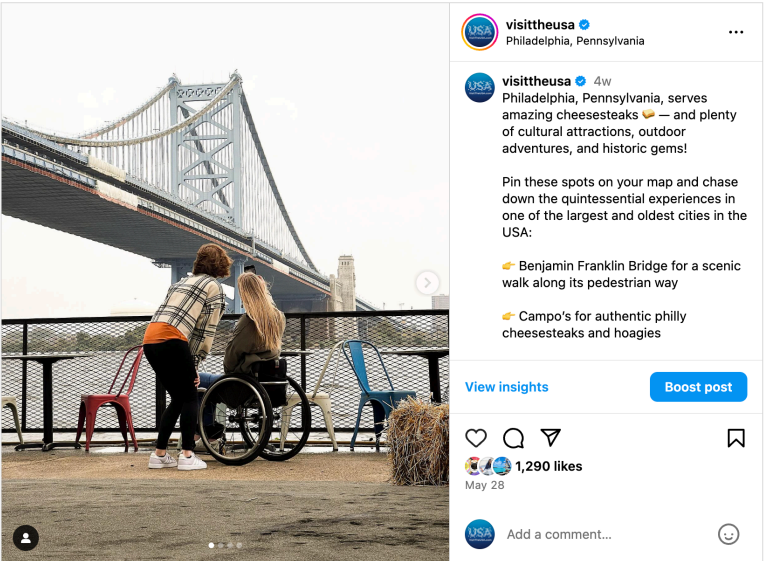
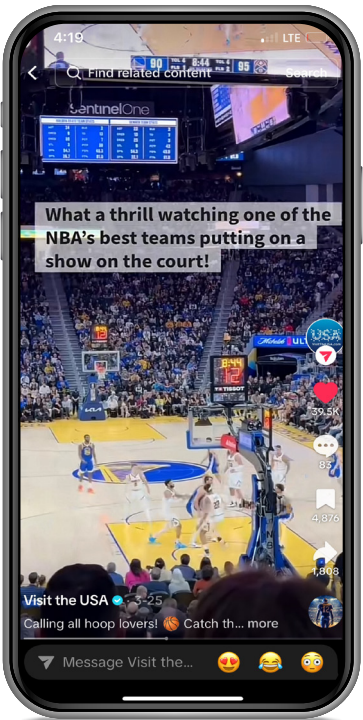
Social media is at the heart of modern marketing, serving as the primary mechanism through which people engage, share, and make travel decisions. These platforms operate at a significant scale while also facilitating authentic relationships that involve real-time interactions. An effective social presence helps grow brand affinity and is required to be relevant in the crowded global tourism market.

Social media channels are essential vehicles to inspire and inform because they reach potential travelers in their natural digital habitats. They are “always on,” which allows Brand USA to deliver compelling content about the diversity, accessibility, and sustainability of U.S. communities and travel options.

Brand USA also works with influential content creators to share their personal experiences traveling throughout the country. Content creators are credible social media professionals who deliver inspiration and information adapted to the interests of their engaged audiences. These collaborations integrate authentic, personal storytelling with broader brand campaigns and optimize content based on analytics and follower engagement. They also help Brand USA deliver

authentic content and provide travel ideas and tips to interested prospective travelers, reminding them of the value of a USA vacation.

These social media efforts collectively create meaningful connections with today's travelers, help to enhance global brand perception, and ultimately drive travel to the United States.



CONSIDERATION

In the consideration phase, would-be travelers explore various sources of content as they gather ideas and lean into the specific destinations and the activities they might want to experience. Their consideration set often narrows as they vector toward a particular type of experience and filter their options. More localized storytelling and destination-specific content help keep the USA as a preferred option and eventually move people toward planning a trip to a particular set of places.



CONTENT MARKETING

Content marketing across multiple channels and a variety of formats stimulates traveler interest in specific USA experiences more than a topline brand. This approach often involves targeted, personalized content that resonates with individual interests and passions, building a deeper connection between potential travelers and the places they are considering. Brand USA highlights the wide variety of distinctive possibilities the USA offers—vast landscapes, cultural landmarks, culinary delights, and unique adventures, to name a few—which helps travelers imagine themselves in those settings, making the destination feel more attainable and appealing. Custom itineraries, regional highlights, road trip suggestions, and activity selections help potential visitors envision their unique journey in the USA.

Content marketing can also build confidence in travel planning and create a virtuous cycle for visitation. Articles, videos, and interactive guides that offer practical tips, insider knowledge, and first-hand experiences can reassure travelers, making them feel well-prepared and excited for their trip. Confidence in planning directly translates to an increased likelihood of travel consideration and booking. Continuous content can foster loyalty and advocacy among travelers, encouraging repeat visits and word-of-mouth promotion.

Content marketing examples include collaborations and story placements in top publications, Brand USA's consumer website, cooperative marketing with industry partners, and episodic programming on GoUSA TV.

GO ^{TO} BALTIMORE

Touch down in Charm City for history, culture and hot steamed crabs.

USA
VisitTheUSA.co.uk

Choose How To Explore The USA

Let the Experts at Travelbag Help You Plan Your Perfect Holiday to the USA

GO ^{TO} TENNESSEE

Score big with lively music and natural beauty.

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Discover the USA: Craft Unforgettable Journeys for Your Clients

Explore the United States with our **sponsored campaigns**, offering unique adventures from scenic road trips to enriching cultural experiences. Craft personalized travel plans that highlight the finest attractions across the nation.

Embark your clients on a journey across the United States and enjoy **up to 25% savings** on select hotels!

Regions

Discover the Regions of the USA with iconic attractions in the **Northeast**, classic Americana charm in the **West**, legendary hospitality in the **Southeast** and the **Pacific**.

[Click here](#) to learn more about our selected regions in the USA.

Get Inspired

Help your clients experience unmissable USA adventures with iconic attractions, family fun, diverse gastronomy, vibrant culture, and entertainment from jazz to thrilling sports.

[Read our dedicated articles](#) to inspire your clients' itinerary to the USA.

Click the map below to reveal our top destinations and book with exclusive **up to 25% deals!**

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More than national parks, *the shared adventures.*

LEARN MORE

YOSEMITE, CALIFORNIA

KC

BAL

SUN 8:00 PM

DET

SF

SUN 11:30 PM

News Scores Schedule Teams Stats Standings Community ...

Game Pass NFL UK Fantasy On Location Tickets Shop Sign In

COLUMBIA RIVER GORGE,
MT. HOOD, OREGON

39



GoUSA TV

GoUSA TV delivers original, donated, and licensed content through more than 20 platforms to consumers in over 50 countries—a potential audience of more than 1 billion households worldwide. This streaming channel features episodic and long-form productions that entertain viewers through outdoor adventures, iconic road trips, foodie hotspots, and must-see places. More than 350 hours of USA travel content garners over 100 million minutes watched annually.

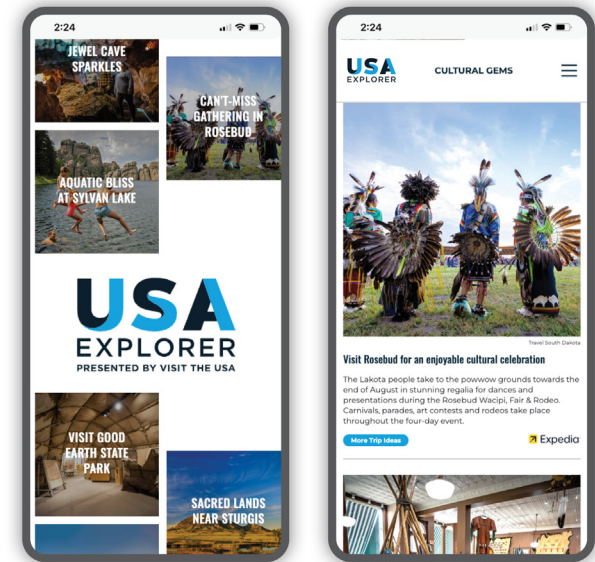
A recent study conducted with Samsung showed that GoUSA TV viewers are twice as likely to consider a trip to the USA in the next 12 months than non-viewers. With the recent introduction of a Spanish-language version of the channel, there is significant potential to build interest and affinity in many new Latin American markets.



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. Stakeholders have the best understanding of what makes them unique, and Brand USA has the channels and platforms to deliver their messages to travelers worldwide.

Cooperative marketing helps destinations and travel businesses reach and compete in international markets while providing valuable content to nudge potential visitors through the consideration phase and toward planning and booking a trip. Brand USA's cooperative marketing programs leverage brand marketing campaigns and global media relationships to speak directly to travel trade.



GLOBAL INSPIRATION PROGRAM

The Global Inspiration Guide is a thematic magazine circulated both digitally and in print. The "Visit The USA" Guide focuses on road trip/itinerary content designed for travelers and planners. Content is localized in language and distributed in all priority markets. The Guide utilizes destination descriptions and photography to encourage travel dreaming, with a digital component that offers interactive rich media units to educate and reach a high-quality audience.

OPTIMIZED AUDIENCE CAMPAIGNS

Optimized Audience Campaigns are full-funnel, direct-to-consumer opportunities designed to drive engagement and activation during key planning windows. They are highly targeted through data and market insights and produce in-depth, partner-specific KPIs, including reach, engagement, and attributable bookings.

PUBLIC RELATIONS

Public relations is a powerful tool in the destination marketing toolbox. Positive coverage of USA travel content in newspapers and magazines, online platforms, television, and other audiovisual formats creates trust with the consumers of those outlets. This reaches consumers through trusted daily media and can prompt strong U.S. travel considerations. It is another valuable way to move the consumer along the traveler journey and help industry stakeholders realize an effective international presence.

Brand USA collaborates with global and market-specific publications to secure valuable media placements. This involves pitching U.S. destinations and experiences to publications and hosting media tours throughout the year. These efforts help the media to tell diverse and thematic stories about the USA and foster long-term relationships.

CONSUMER DIGITAL PLATFORM

Brand USA’s consumer-facing website (VisitTheUSA.com, GoUSA in Asian markets) is the primary hub for publishing impactful editorial content about the diverse travel experiences across the United States and providing important trip planning information. The consumer website is available in eight languages and geolocates based on IP address.

In FY25, Brand USA will implement a robust publishing model that starts with the evolution of the global consumer website and develops a variety of content to drive awareness of experiences, simplify the planning process, and educate and engage travelers.



DESERT BOTANICAL GARDEN,
PHOENIX, ARIZONA

PLANNING AND BOOKING



As travelers narrow their options, they begin to plan and book a trip. During this phase, it is important to maintain consumer confidence and facilitate seamless booking options.

Planning generally involves researching detailed information about destinations, transportation, accommodations, and activities. Potential visitors compare prices, read reviews, and consider how convenient a place is when assessing overall value. Online travel platforms, travel review websites, and travel experts are critical in providing comprehensive information to help consumers make informed decisions.

Finally, travelers will book some or all the elements of their trip. They may purchase flights and accommodations or make reservations. Booking sites, travel agencies and tour operators, hotels and airlines, and other travel providers play a crucial role in this phase. Collaboration with these channels can help convert consideration into action and facilitate travel to new places and experiences.

TOUR OPERATOR CO-OPS

Many international travelers rely on the travel trade to book part or all aspects of a trip, especially for overseas and long-haul travel. Travel agencies and tour operators provide added peace of mind, destination expertise, perceived value, and a one-stop shop for all vacation needs. Even airlines and industry networks can be important partners in the marketing and distribution of travel experiences. Collaboration with members of the travel trade is essential to driving bookings to the USA and expanding the options on offer.

Brand USA collaborates with key tour operators on cooperative marketing campaigns (“co-ops”) to feature a wide array of diverse destinations and experiences throughout the United States. Dozens of tour operator co-op campaigns drive increased travel to the USA and allow industry partners to attract new visitors. Tour operator co-op partners range from major global brands like Air France, Luxury Escapes, and Hana Tour to market-specific players like Trailfinders. These campaigns reach a highly targeted audience and showcase new products and lesser-known destinations that capture the true diversity of the USA.

ONLINE TRAVEL AGENCY (OTA) CAMPAIGNS

Online platforms are critical to the modern trip planning and booking mix. Different markets demonstrate various preferences, but the trend is generally upward among the emerging generations of travelers. Capitalizing on the significant consumer interest in visiting the United States requires a robust presence on important travel review and commerce sites.

Travelers searching on OTA platforms are actively engaged in the planning and booking phases of their travel journey. Brand USA works with OTAs to ensure the USA is present in those influential moments. OTA campaigns are typically included as part of a larger brand advertising effort and may also target those who are exploring competitor destinations. Like tour operator co-ops, Brand USA’s OTA campaigns convert consumer consideration into new visitors and provide an outlet for domestic partners

to compete for their business. OTA campaign partners include platforms like Booking.com, Expedia, Hotelbeds, Tripadvisor, and many more.

TRAVEL TRADE ENGAGEMENT

Travel agencies, tour operators, and travel consortia act as a crucial intermediary with potential visitors. In addition to streamlining the planning process and driving incremental bookings, it is important to help travel trade professionals to promote the USA through each phase of the traveler journey.

Brand USA’s representatives in 17 market regions conduct educational seminars and webinars to expand travel agent awareness of different aspects of the USA and grow the professional network within the ever-changing local travel trade community. Multi-city roadshows ensure travel agents have the knowledge and tools they need to sell the USA confidently. Events like film screenings and other in-market activations create buzz and drive inspiration in the travel trade. Collaboration with U.S. embassies and consulates presents a united front for the country and helps communicate accurate entry policy and dispel misperceptions.

The USA Discovery Program is Brand USA’s online travel agent training program, available worldwide in eight languages. Newly updated in 2024, this platform reaches agents with inspiration and the latest modules they need to keep learning and acquiring new badges about different regions and experiences they can offer their customers.



PRODUCT DEVELOPMENT

Product development refers to increasing the breadth of travel products available in a market. The international travel trade is often hungry for new and distinguishing offerings that can help them book more business to the USA. Product development is one of the most direct ways to increase traveler dispersal and ensure the benefits of increased arrivals are broadly shared by

MEGAFAMS

Brand USA MegaFams are large familiarization tours organized with major airlines and U.S. destinations to bring dozens of qualified travel agents from a particular market to the United States at one time and host them on simultaneous itineraries. Participants reunite at a grand finale location—sometimes the site of a new international air route—and present their experiences to the other groups. MegaFams drive inspiration while stitching together diverse destinations and businesses in logical itineraries.

PRODUCT FAMS

Brand USA product fams are smaller, high-impact familiarization tours that host decision-makers from key tour operators. These individuals are often responsible for selecting which destinations their company features in marketing campaigns and communicating priorities to their sales teams. Product fams showcase bookable travel products and facilitate B2B introductions. They also provide inspiration and first-hand exposure to the destination.

ROAD TRIPS USA

Brand USA curates and distributes multi-state, themed itineraries for U.S.-based receptive tour operators and international travel trade to offer their customers. By stitching together gateway and beyond-the-gateway experiences, Brand USA promotes these bookable itineraries through social media content, tour operator co-ops, travel agent trainings, and public relations.

communities throughout the country. Brand USA capitalizes on the aspirational nature of the United States and the general desire for authentic travel experiences to bring new destinations and suppliers to the table. Several programs augment the volume and diversity of travel product in market and facilitate connectivity among domestic and international players.

MISSIONS AND B2B EVENTS

Brand USA facilitates business-to-business engagement for the U.S. tourism sector with key travel trade. Through organized missions to key source markets and hosted buyer programs, these help stakeholders build, strengthen, and maximize their relationships and expand product offerings. Missions to Australia, Canada, India, Japan, Korea, Mexico, New Zealand, and South America complement flagship events, such as Brand USA Travel Week U.K. and Europe.

TOURISM EXCHANGE USA

Tourism Exchange USA (TXUSA) is a B2B digital tourism marketplace that facilitates the real-time exchange of live inventory between suppliers (DMOs and tourism businesses based in the USA) and distributors (in-country tour operators, travel agencies, OTAs) for worldwide distribution. This novel tool increases the travel product available through existing sales in market, helping Brand USA drive visitors to, through, and beyond the gateways. By lowering the barriers to entry, Tourism Exchange USA has the potential to facilitate opportunities for lesser-known destinations and minority-owned, small, and rural businesses that historically have not had access to global sales and distribution networks. In FY25, this platform will continue to expand to more U.S. suppliers, adding products from over 18 states to the exchange and building even greater global distribution.

FY25 SUMMARY BUDGET

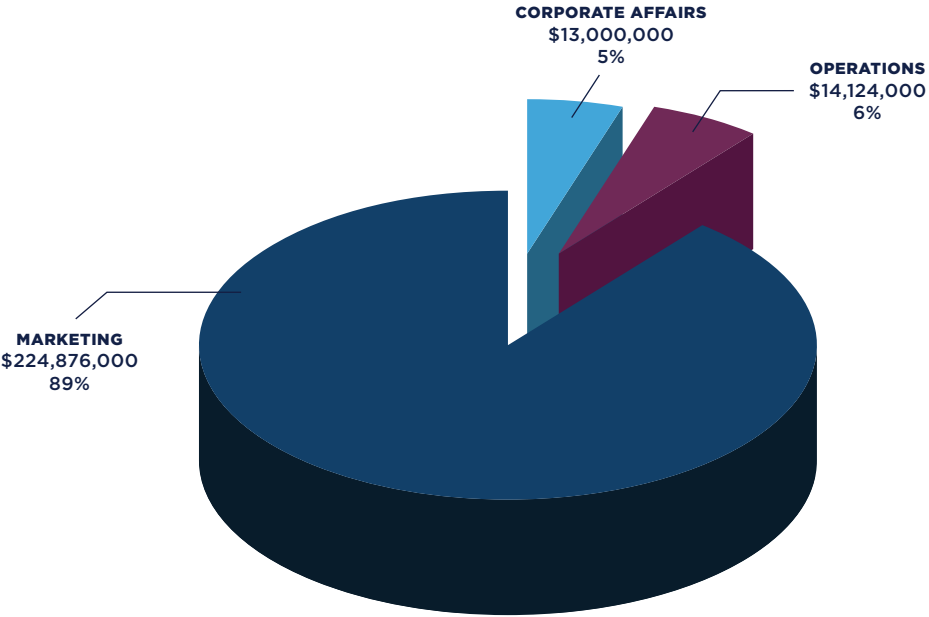


URBAN INDIAN CENTER,
SALT LAKE CITY, UTAH

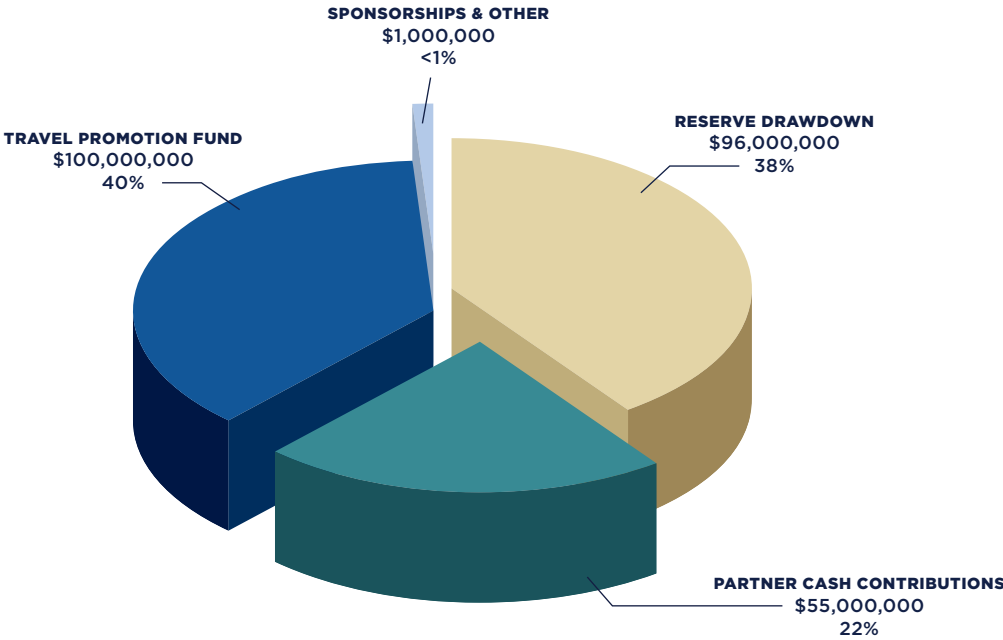
FY25

SUMMARY BUDGET

FY25 EXPENSE BUDGET
Budget Total: \$252,000,000



FY25 REVENUE BUDGET
Budget Total: \$252,000,000



BUDGET ITEMS OVER \$450,000

CONTRIBUTOR	DESCRIPTION	BOTTOM RANGE	TOP RANGE
Aviareps (Brazil)	Brazil Trade and PR Representation	\$1,450,000	\$2,000,000
Aviareps (JPY) Marketing Garden Ltd.	Japan Trade and PR Representation	\$850,000	\$1,200,000
BBC Studios Productions Limited	Production	\$4,000,000	\$7,000,000
Big Village	Global Research	\$600,000	\$1,000,000
Daniel J. Edelman Inc.	Global Social Media AOR	\$2,200,000	
Discovery Channel	Global TV and Digital Advertising	\$1,100,000	
Edelman PR Korea	Korea Trade and PR Representation	\$1,200,000	\$1,600,000
Etc. Venues County Hall	Venue and Catering	\$570,000	
Gate 7 Pty Ltd.	Australia Trade and PR Representation	\$1,300,000	\$1,700,000
Hylink USA	Digital Development, Social Media Management, Trade Development in China	\$960,000	
Hylink USA	China Media	\$1,450,000	
Interface Tourism Spain	Spain Trade and PR Representation	\$600,000	\$1,000,000
ITV plc	U.K. Digital and TV Media	\$2,280,000	
JCDecaux	European OOH Advertising	\$450,000	
Lieb Management	Germany and Benelux Trade and PR Representation	\$2,000,000	\$2,600,00
Miles Partnership LLLP	Partner Program Marketing (Digital Development, Content Development, Creative, Media Planning and Buying) AOR	\$2,500,000	\$3,500,000
MMGY Global Ltd.	U.K., Ireland, Italy, and France Trade and PR Representation	\$4,500,000	\$5,650,000
Niche Media Global Ltd.	Content Distribution and Business Development	\$450,000	\$600,000
Novak Birch	Booth Design and Construction	\$650,000	\$950,000
R&R Partners Inc	Global Media Planning and Buying	\$2,250,000	\$3,000,000
Sales Internacional	Mexico Trade Representation	\$450,000	\$700,000
Sartha Marketing	India Trade and PR Representation	\$800,000	\$1,000,000
SDL	Translation	\$600,000	\$1,000,000
Spark Branding House, Inc.	Creative, Branding, and Strategy	\$3,000,000	\$4,000,000
Tourism Exchange USA	Technology Platform	\$3,500,000	
TravPRO Mobile	USA Discovery Program Tech Platform	\$450,000	\$600,000
U.S. Travel Association	Event Sponsorships	\$1,650,000	

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
BOARD OF
DIRECTORS &
LEADERSHIP

SIoux FALLS, SOUTH DAKOTA

BRAND USA 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 U.S. Secretary of Commerce in consultation with the U.S. Secretary of State and the U.S. Secretary of Homeland Security. As required by the amended Travel Promotion Act, 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 the time of publication, the following business leaders serve on the Board of Directors for Brand USA.



ALLEN ORR
SECRETARY,
FOUNDER,
ORR IMMIGRATION LAW FIRM



LAUREN BAILEY
CHIEF EXECUTIVE OFFICER
AND CO-FOUNDER,
UPWARD PROJECTS



KRISTEN ESPOSITO
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MARK HOPLAMAZIAN
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MIKE MANGEOT
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KENTUCKY DEPARTMENT
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TIM MAPES
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CHIEF MARKETING & COMMUNICATIONS
OFFICER, DELTA AIR LINES, INC.



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CHIEF EXECUTIVE OFFICER,
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ENTERPRISE HOLDINGS INC.



ELLIOTT FERGUSON
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HARI NAIR
GLOBAL SENIOR VICE PRESIDENT,
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BRAND USA LEADERSHIP



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CHIEF EXECUTIVE OFFICER



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CHIEF MARKETING OFFICER



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AARON WODIN-SCHWARTZ
CHIEF CORPORATE
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JAKE CONTE
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CASSADY BAILEY
VICE PRESIDENT, PARTNER
ENGAGEMENT AND MARKETING



JACKIE ENNIS
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BRIAN WATKINS
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Kathrin Kush, CPA, Senior Controller
Cat Reith, Senior Director, Partner Programs & Operations
Sade Smith, Senior Director, Human Resources & Administration
Susan Zachar, Senior Director, Brand
Alexis Adelson, Director, Events
George Bansah, Director, Budget & Forecast Liaison
Chelsea Benitez, Director, Consumer Research
Aila Bereznak, Director, Salesforce Operations
Skylar Clark, Director, Strategic Partnerships
Casey D'Ambra, Director of Content
Peter Dodge, Director, Public Affairs
Chris Ellis, Director, Partner Engagement
Luke Hennig, Director, Partner Operations
Colleen Mangone, Director, Corporate Communications
Julie Paulson, Director, Partner Programs
Jennifer Ross, Director, Media & In-Kind Planning
Suzy Shepard, Director, Global Trade Development (Asia Pacific)
Rianna Airitam, Senior Manager, Partner Operations
Craig Ashby, Senior Manager, Business Processes & Financial Analytics
Dani Campana, Senior Manager, Partner Engagement
Casey Canevari, Senior Manager, Global Trade Development (Canada)
Amanda Davis, Senior Manager, Global Trade Development (UK, Europe, India)
Jerod Fuchs, Senior Manager, Partner Marketing
Clemen Hernandez, Senior Manager, Media Planning
Paul Howard, CPA, Assistant Controller
Maya Hua, Senior Manager, Partner Engagement
Mimi Jung, Senior Manager, Branding & Design
Chelsea Sullivan Kaiser, Senior Manager, Partner Marketing
Matt Nicoletta, Senior Manager, Marketing Analytics & Business Insights
Jonas Onkelinx, Senior Manager, Research & Insights
Kat Pommer, Senior Manager, Technology
Coralis Rivera-Aponte, Senior Manager, Social Media
Blanca Romero, Senior Manager, Office Management
Maria Santos, Senior Manager, Brand
Lisa Tejada, Senior Manager, Global Trade Development (LATAM)
Amy Aaronson Levine, Manager, Public Affairs
Semaj Carr, Manager, Human Resources
Philip (Phil) Dickieson, Manager, Events
Andrew Felts, Manager, Corporate Communications
Marsha Jones, Manager, Financial Operations
Loida Liclic, Staff Accountant II
Dominique McCaskill, Manager, Corporate Affairs
Grace Muniu, Senior Reporting Analyst
Hayden Pigott, Manager, Social Content
Carolyn Qualls, Manager, Partner Marketing Programs
Munira Yusuf, Manager, Accounts Payable
Alex Dudich, Senior Coordinator, Partner Programs
Sofia Dunn, Senior Coordinator, Media Producer
Maggie Eng, Staff Accountant III
Michelle Harris, Senior Coordinator, Campaign Management
Desmon Hickson, Senior Coordinator, Global Trade (Asia Pacific)
Laura Jacobson, Senior Coordinator, Global Trade (Europe, UK, India)
Allie May, Senior Coordinator, Partner Marketing
Brittany McCabe, Senior Coordinator, Brand
Thanh Nguyen, Senior Coordinator, Branding & Design
Angie Riveros-Huaman, Senior Human Resources Coordinator/ Recruiter
Kate Romero, Senior Coordinator, Social Media
Katie Streater, Senior Coordinator, Global Trade Development
Antonio Tyler, Senior Coordinator, Information Technology
James (Tre) Wilson, III, Senior Coordinator, Partner Operations
Nthanze Kariuki, Coordinator, Media Producer
Alexis Kemp, Coordinator, Partner Operations
Diana Mellitz, Coordinator, Partner Marketing

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