

# Welcome!

**While you wait for us to get started,  
here's a few housekeeping notes:**

- This webinar is being recorded and will be available on our website after the session.
  - You will receive a link to the recording/deck via email after the session.
  - Please type your questions into the Q&A box; we will do our best to answer as many as we can electronically, but any we cannot answer will be responded to via email post-webinar.
  - Not sure who to contact for additional questions? Email [info@thebrandusa.com](mailto:info@thebrandusa.com) to be connected to the right party!
  - Thank you for being here, the webinar will begin shortly!
-

# STRATEGIC PLATFORM

WE EXIST TO (VISION)

**Enrich lives by welcoming the world to travel to the USA**

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THEREFORE WE (MISSION)

**Create community prosperity through partnership, leadership, and travel inspiration**

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WE DELIVER FOR

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

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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.

# 02

## Brand Update



# Brand Refresh

## Overview

The USA is a leader in the travel and tourism industry due to our diversity of people, places and experiences. We are an aspirational destination to many, and a lesser known idea to others. As the global traveler changes, it's important to evaluate our position, and adjust it if necessary to ensure our long-term success can be sustained well into the future.

## Core Objective

To assess and refine the positioning of the USA travel to create a differentiated position in the global travel market, and ensure a shared brand landscape that will serve the US travel industry.

INDUSTRY RESEARCH

CONSUMER RESEARCH

GLOBAL TRAVEL INSIGHTS

POSITIONING DEVELOPMENT

---



# 150 Partners (Thank you!)

Jennifer Adams  
Rolando Aedo  
Joshua Albrecht  
Renee Areng  
Brandon Barnes  
Ben Berthelot  
Liz Bittner  
Amy Boek  
Adam Burke  
Tammy Canavan  
Laura Carlson  
Marcus Carney  
Jeremy Chase  
Jennifer Chase  
Dolly Chewning  
Katy Clair  
Camila Clark  
Lauren Cleland  
Julie Coker  
Sara Coleman  
Anthony Cordo  
Craig Davis

Lorna Davis  
Jayne Deluce  
Erin Duggan  
Mandy Eck  
Kyle Edmiston  
Kirk Elmquist  
Tracy Farhad  
Elliott Ferguson  
Kara Franker  
Jorge Franz  
Racene Friede  
Zach Fyne  
Beth Gendler  
Beth Genson  
Jane Ghosh  
Tyler Gosnell  
Mike Gussiaas  
Wendy Haase  
Michael Hackman  
Susan Hamle  
Mary Hammond  
Edward Harris

Patrick Harrison  
Jimmy Hart  
Virginia Hayley  
Joe Heller  
Alani Henneman  
Julia Hertel  
Chris Heywood  
Danielle Hollander  
Leonard Hoops  
Al Hutchinson  
Rachel Insler  
Mark Jaronski  
Brad Jones  
Kalani Kaanaana  
Kerri Kapich  
Cecelia Khan  
Tracy Kocher  
Kurt Krause  
Carrie Lambert  
Flavia Light  
Christina Lokey  
Maria Lourdes Delgado

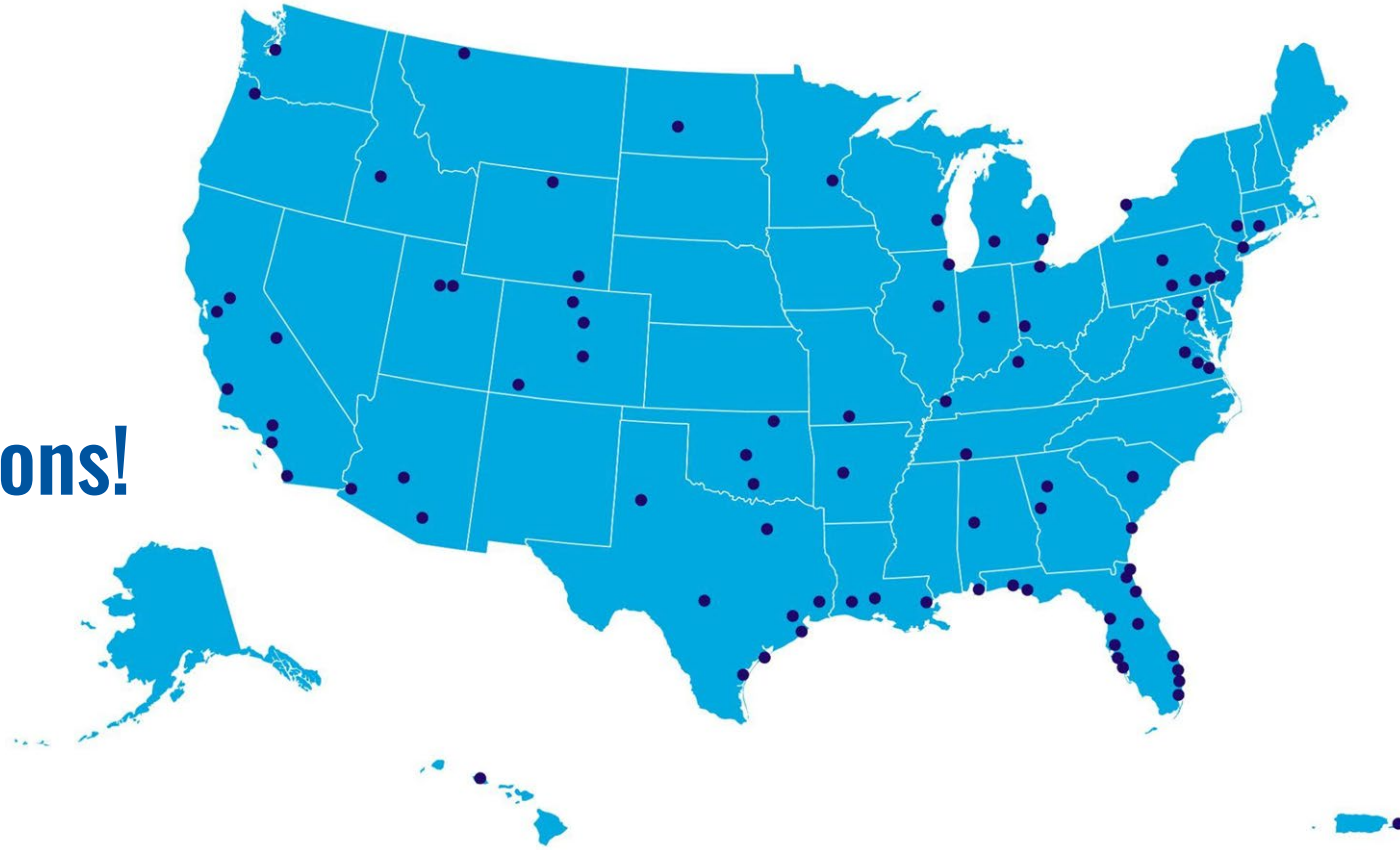
Tony Lyle  
Trevor Lynch  
Mike Mangeot  
Joe Marinelli  
Paul Mason  
Karyn Mayo  
Trish McClean  
Kristin McGrath  
Cynthia Miller  
DT Minich  
Katie Mitura  
Claude Molinari  
Jeff Morris  
Daniel Nahoopii  
Sonya Nash  
Terry Natwick  
Magan O'Hara  
Lynn Osmond  
Shawn Parker  
Dave Parulo  
John Percy  
Madeline Phillips

Karl Pietrzak  
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John Ragozzino  
Nancy Richardson  
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Leena Riggs  
Stacy Ritter  
Dan Roberts  
Melaine Rottkamp  
Janette Roush  
Dan Rowe  
Marc Sapoznik  
Matthew Scales  
Kavin Schieferdecker  
Milton Segrar  
Caitlyn Shearer  
Paige Shepherd  
Fritz Smith  
Bill Solleder  
Christina Stone  
Maria Swindell Gus  
John Tanzella

Steven Totten  
John Urdi  
Lindsay Vidrine  
Marisol Vindiola  
Fred Walker  
Chad Wassmer  
Carrie Westergard  
David Whitaker  
Barry White  
Jim Wollenburg  
Kevin Wright  
Kayla Yap  
Emily Zertuche  
Amy Zientek

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**86  
locations!**



# Industry Takeaways

## Strengths

VARIETY

DIVERSITY OF CULTURE/EXPERIENCES

POP CULTURE/ASPIRATIONAL

ACCESS/FREEDOM

## Challenges

SAFETY

UNWELCOMING/POLITICS

COMPETITION

COST CONCERNS

## Priorities

DIVERSITY

EXPERIENCES

WELCOMING

AUTHENTICITY

# Primary & Secondary Research

## Secondary Research

American Express Travel 2023 Global Travel Report

Criteo state of Global Travelers Q1 2023

WTTC A World In Motion: Shifting consumer travel trends in 2022 and beyond

Simon-Kucher & Partners global market research survey conducted May 2023 (Spain, Germany, UAE, Netherlands, France, UK, US

GWI, Traveler's Budget in 2023

Mastercard Travel Industry Trends 2023

## Primary Research (Qualitative, 180 Respondents)

Australia  
United Kingdom  
Germany  
Canada  
France  
India  
South Korea  
China  
Japan  
Mexico  
Brazil  
Colombia

## Primary Research (Quantitative, 25,219 Respondents)

Norway	South Korea
New Zealand	Chile
Belgium	Colombia
Ecuador	Italy
Ireland	Brazil
Sweden	Australia
Denmark	United Kingdom
Mexico	Canada
Netherlands	France
Japan	India
Peru	China
Argentina	Spain
Germany	

# Consumer Insights (Perception & Reputation)

## Strengths

Strong reputation, highly recommended

Strong desire to visit (top 10 destination)

Popular, well-known

Open-minded, friendly & welcoming

Politics are not a barrier

## Challenges

Not seen as fresh or distinctive

Would rather visit new places

Costly & complex to plan a trip

Just as arrogant as we are friendly



# THE INDUSTRY AND CONSUMER INSIGHTS ALIGN ON MUCH, BUT CREATING DISTINCTION IS THE BIGGER FACTOR FOR SUCCESS.

## INDUSTRY PRIORITIES

Increasing Costs  
More Competition  
Welcoming

## CONSUMER PRIORITIES

Increasing Costs  
More Competition  
Destination Distinction

---

# Not 1 issue, but many to solve.

**MORE DESTINATION OPTIONS (COMPETITION)  
NOT SEEN AS CULTURALLY DISTINCTIVE  
TOO HARD TO PLAN FOR  
TOO EXPENSIVE  
FAR AWAY**

Brand USA

# THE U.S. IS PRETTY GREAT, BUT IT'S JUST NOT WORTH IT AS MUCH ANY MORE.

OUR NEW POSITIONING NEEDS TO TACKLE THIS HEAD ON.

---



# How does the USA's travel brand enrich lives?

As the most diverse country in the world with the most diverse experience, we have a unique promise to:

**Unite people with their passions**



# Our Brand Positioning

The USA's distinctive position in the travel landscape is as the land of possibility that empowers all travelers true discovery because:

**Here, you can.**



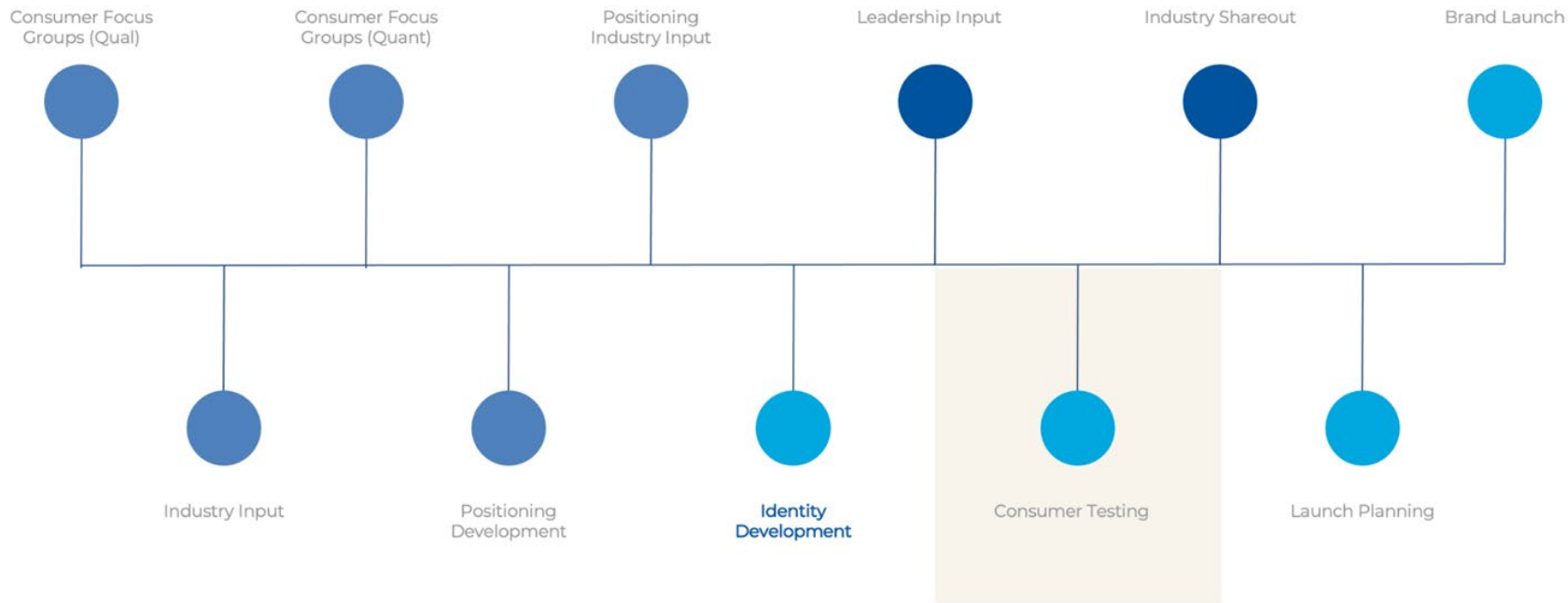
# Here, You Can

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***As the most diverse country in the world, the USA presents international travelers with endless possibilities to create their perfect experience.***

America is known as the land of opportunity. For global travelers it becomes the land of possibility – an open invitation to explore without limits, to find joy in every moment, and to embrace who you are – and whoever you aspire to be. Here, you can trust that even your loftiest vacation dreams will exceed expectations, and unexpected delights await you at every turn. Here, individualism thrives, giving life to an eclectic mix of people, cultures, and lifestyles that come together in a celebration of beautiful contrasts. Here, even the unlikeliest of possibilities become everyday realities – from urban energy to rural charm, over the top to under the radar, and sheer thrills to quiet fascination. Whether it's the trip you've always wanted, or the adventure you never knew existed, a visit to the USA offers the opportunity to answer every wonder, each new intrigue, and every wish with, "Here, You Can."

# The Process



# Brand Partner Integration

As we develop our new brand there will be partner programs led by our brand creative. These programs are being designed to align the USA Brand and partner priorities.

Partner integration opportunities will be available for FY2025 as we roll out creative in our core markets, and all programs will run with our in-market live periods.



# 03

## Consumer Marketing Update



# Strategic Marketing Framework

## Inspire with a Variety of Distinctive Possibilities

Showcase the freedom and transformative, distinctive experiences only the USA can offer travelers.

## Educate with Targeted & Individualized Experiences

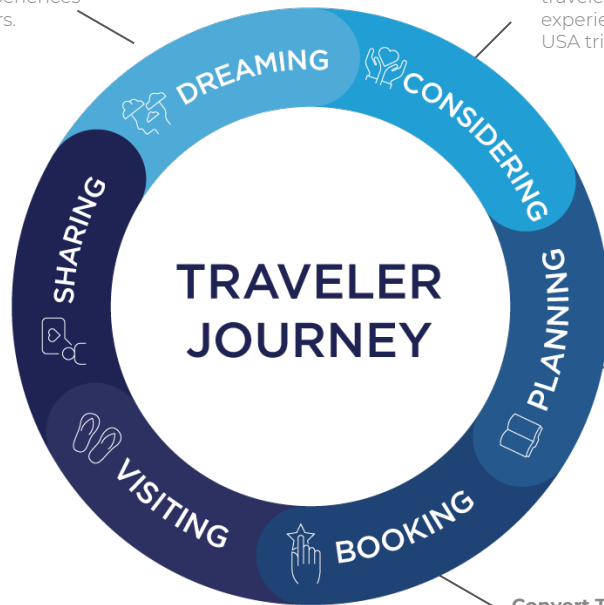
Create confidence by connecting travelers with destinations and experiences so they can personalize their USA trip based on what they love.

## Simplify Planning

Help travelers make the most of their visit by sharing valuable resources to aid in their active decision-making process.

## Convert Travelers with Urgency & Seamless Integrations

Drive urgency to book now through our partners.





# Brand USA

## FY2024 Consumer Media Tactics by Phase

STAGE	INSPIRATION	EDUCATION	PLANNING	BOOKING
TASK	DRIVE REACH + TOP OF MIND AWARENESS	INCREASE FAMILIARITY + CONSIDERATION THROUGH CONTENT	INCREASE INTENT THROUGH SITE VISITATION	DRIVE INCREMENTAL BOOKING TO THE USA
CHANNELS	CTV Pre-Roll Meta TikTok	Pre-Roll Meta TikTok Market-Specific Content Collaborations	Google Search Display Media Meta	OTA Media

# Brand USA Marketing Objectives

## Volume

- Increase visitation and frequency of visits.
- Grow U.S. market share.

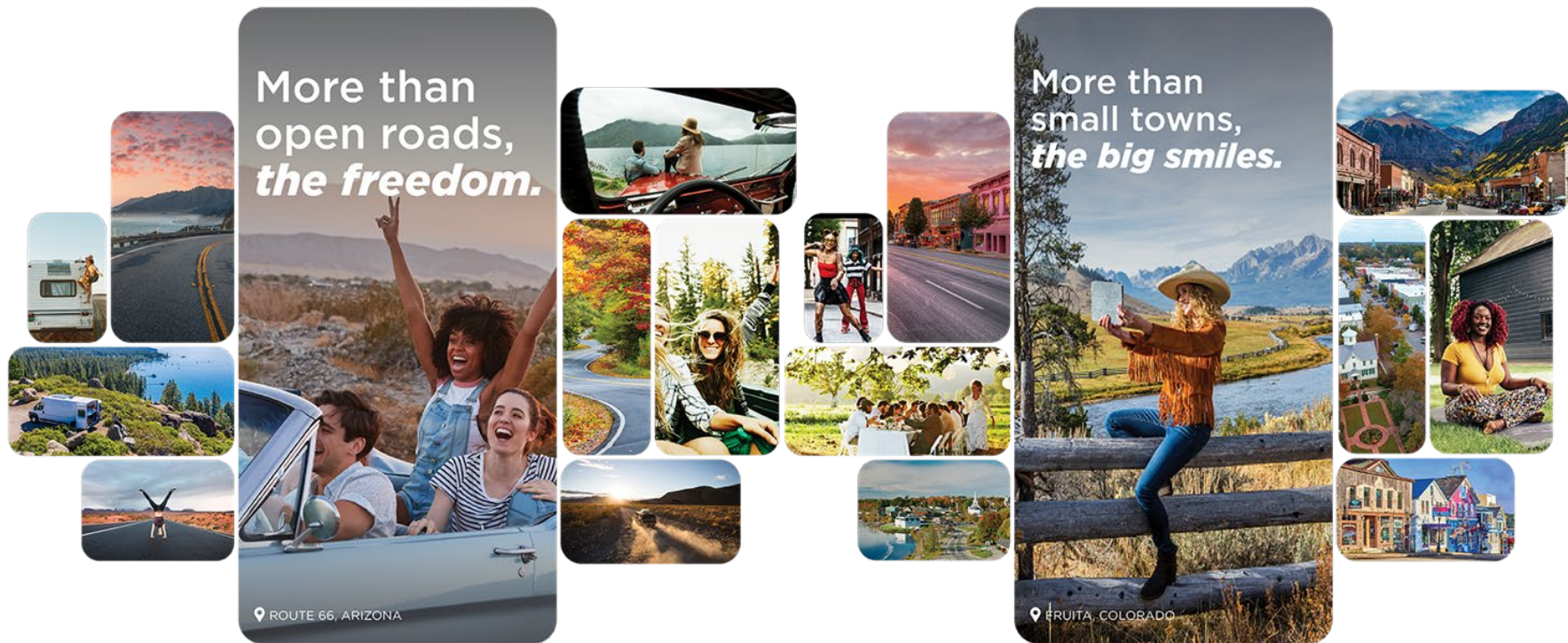
## Spend

- Increase traveler spend.
- Disperse travelers to multiple destinations across the USA.

## Perception

- Strengthen the brand presence of the USA as a travel destination.
- Improve brand perception of the USA as a travel destination.

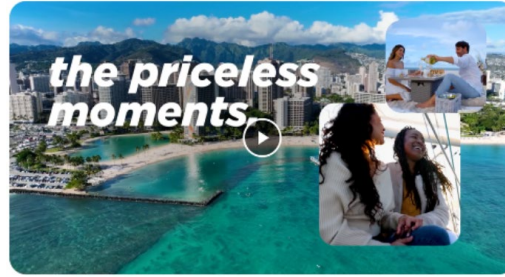
# FY2024 Consumer Campaign: Experience It All



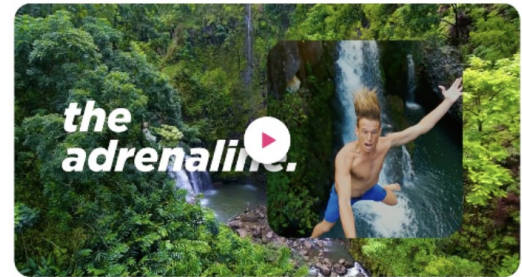
# FY2024 Consumer Campaign: Experience It All



Culture Questors



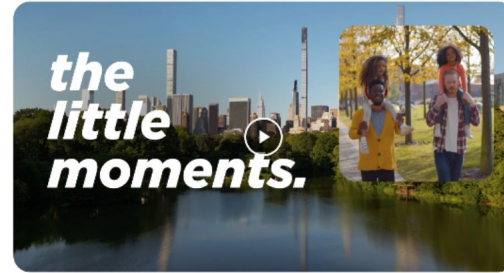
Glamorous Getaways



Excitement Seekers



Outdoor Enthusiasts



Family Time







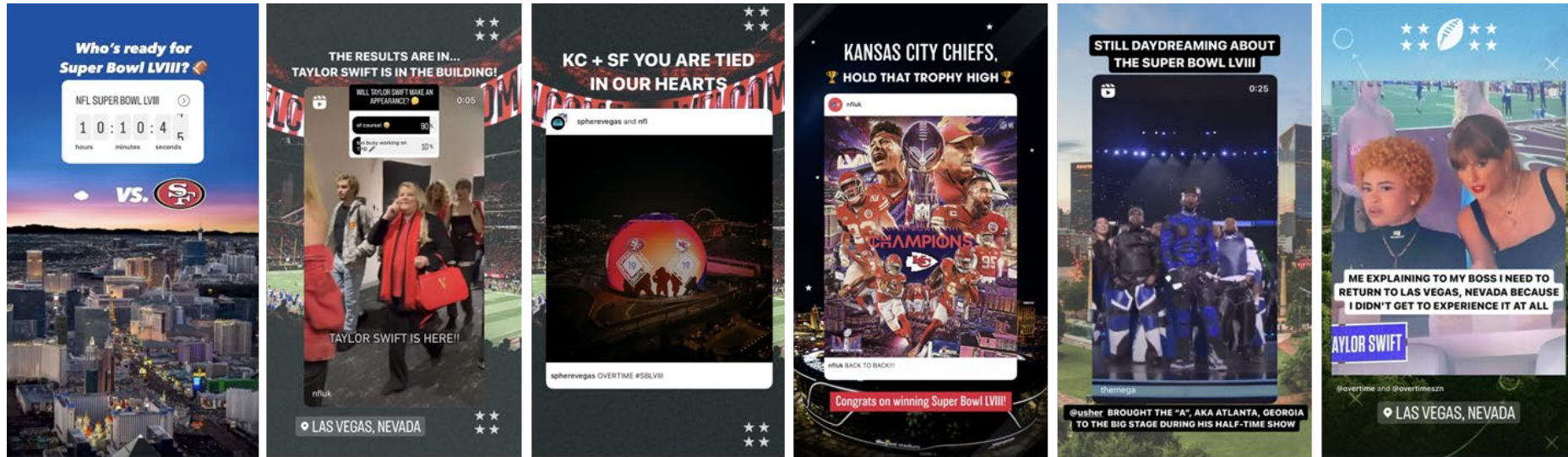
# FY2024 Paid Media Timing

## FY24 Campaign Launch

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
CANADA										
MEXICO										
UK										
GERMANY										
AUSTRALIA										
BRAZIL										
FRANCE										
INDIA										
SOUTH KOREA										
COLOMBIA										
JAPAN										

 = Markets live through July

# Pop Culture Is One of the Most Notable Exports of the USA



As the world tunes in, we find relevance for our brand and actively contribute to the conversation.

Brand USA

# 2023 NFL International Series







# NFL International Series

## Overview

The NFL brought its International Series back to the UK for the 16th time and to Germany for the 2nd consecutive year. These games have historically generated a ton of excitement and end up selling out.

Brand USA had the opportunity to align with this unique and timely, ownable U.S. moment where buzz and interest around an iconic American sport was center-stage to engage potential visitors with a travel message.

## Core Objective

Drive deeper awareness of the U.S. as a travel product and generate intrigue about the destinations behind the team. Using this iconically American experience, we seek to create conversation around the Visit the USA brand in connection with the #1 sports league in the world.

AWARENESS

INSPIRATION

EDUCATION

PERCEPTION

# Key Results

**39.9M**

IMPRESSIONS ACROSS  
PAID MEDIA, A 22% OVER-  
DELIVERY.  
(7.2M IMPRESSIONS)

**£8.1M**

GROSS MEDIA VALUE  
(\$10.3M) AND £2.7M  
(\$3.43M) IN FUTURE NET  
VALUE FROM THE NFL  
SPONSORSHIP.



# 2026 Moments of Impact

Brand USA is leveraging key moments and developing FY2024 - FY2026 strategies where the world will be watching to spur awareness and demand.

## ROAD TRIPS

### Route 66 Anniversary

EDUCATE AND INSPIRE  
TRAVELERS HIGHLIGHTING  
THE EXPERIENCE OF ALL  
OF THE ICONIC U.S.A.  
ROAD TRIPS

## SPORTS

### FIFA World Cup

ENCOURAGE TRAVELERS  
DURING THE PLANNING  
PROCESS TO STAY  
LONGER AND INCREASE  
THEIR SPEND ON AN EPIC  
VACATION TO THE U.S.A.  
DURING THE GAMES

## CELEBRATIONS

### 250th Anniversary

HIGHLIGHT THE UNIQUE,  
IMMERSIVE CULTURAL  
EXPERIENCES THAT ONLY  
THE U.S.A. CAN OFFER



A photograph of a dense forest of tall redwood trees. Two people, a child in a yellow hoodie and an adult in a green jacket, are standing at the base of a massive tree trunk on the right, with their arms raised in awe. The forest floor is covered in brown leaves and green ferns. Sunlight filters through the canopy, creating a dappled light effect.

**GoUSA<sup>TV</sup>**

**Because every place has a story.**

# Platforms



**SAMSUNG**  
TV Plus



**LG**

**plex**



chromecast



FreeCast®

firetv

sling

**ROKU**



MXPLAYER

**OTT**  
STUDIO

TeleUP

androidtv

mitv+

rlaxx

Netgem TV

**TCL**

**Rakuten**

**REWARDED**  
IT PAYS TO WATCH

**ZEAS**

VIDAA



99.7M

TOTAL MINUTES  
WATCHED IN  
FY23

350+

HOURS OF CONTENT  
AVAILABLE

26+  
MINUTES

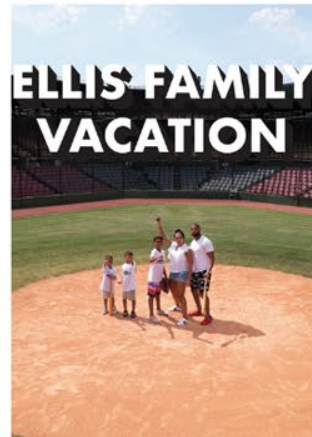
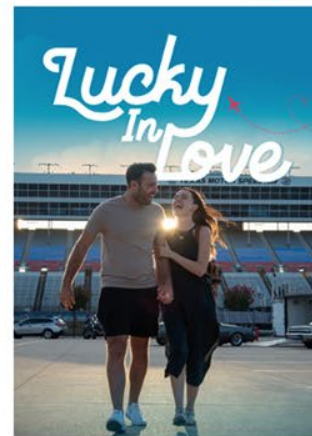
AVERAGE TIME  
SPENT VIEWING FY23

8M+

AVERAGE MINUTES  
WATCHED  
PER MONTH FY23

68

NEW ORIGINAL  
EPISODES CREATED  
FY23





# 04

## YTD Global Trade Highlights



# Global Trade Major Events YTD

- Travel Agents Trained - 12,304
- Tour Operator Coops executed/confirmed - 62
- Movie Screenings - 11 cities
- Fams - 3 executed/4 Fams in April/ further 10 confirmed
- MegaFams confirmed:
  - Canada: Air Canada/United Airlines – April
  - UK/Ireland: BA/AA/Aer Lingus – September
  - Korea: Korean Air/Delta Air Lines - October
- Colombia representation confirmed
- Missions to 6 markets completed:
  - India
  - Mexico
  - Australia
  - Brazil
  - Colombia
  - New Zealand





# India Sales & Media Mission – January

- 10th Brand USA Sales Mission and inaugural Media Mission
- 39 U.S. trade partners, 56 delegates, plus 11 PR representatives
- 86 buyers from 13 cities
- Prescheduled 1:1 trade & media meetings





Brand USA

# Mexico Sales & Media Mission

January 29 – February 2

- 4th Brand USA Sales Mission
- 41 U.S. trade partners, 53 exhibitors
- 34 Buyers from Mexico City and Guadalajara
- 1,140 Prescheduled 1:1 trade & media meetings
- 283 travel agents trained during Destination Trainings



Brand USA

# Australia B2B, New Zealand Expos February

- New Zealand Expos: Auckland & Christchurch
- 50U.S. partners – 83 delegates
- 317 agents
- Sydney B2B: 62 US partners/82 delegates
- 39 buyer companies/52 delegates
- Approx. 1,320 meetings held
- Coinciding with Visit USA Australia Expos – 3 cities – 647 agents





# South America Mission: Brazil & Colombia

## February 11-15, 2024

- 2nd Sales Mission to South America
- 2 cities: São Paulo , Bogotá
- 26 U.S. partners/43 delegates and 1 Airline partner: Delta Airlines
- 60 Buyers from 10 cities
- 1,560 1:1 Trade meetings
- 232 Travel agents
- Market Presentations







# Upcoming 'Canada Connect' June 2024

- First Brand USA 'sales' event in Canada
- Blend of 1:1 meetings, networking, agent engagement
- Market Insights from Industry Experts
- 3 cities: Toronto, Montreal, Calgary
- 37 U.S. partners registered
- Priority given to destinations who do not have trade representation in-market





# Upcoming Japan & Korea Sales Missions

## Japan Sales Mission: July 8 - 12

- Includes B2B meetings, agent trainings, networking events and educational sessions
- 2 cities: Osaka and Tokyo

## Korea Sales Mission: July 15 - 18

- Includes B2B meetings, agent trainings, networking events and educational sessions
- 2 cities: Seoul and Busan

*Registration deadline for both: May 17, 2024*



# 05

## Partner Programs Update

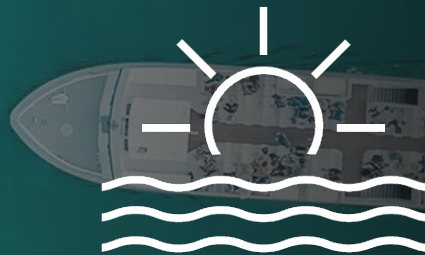




# THE FUTURE OF PARTNERSHIP WITH BRAND USA



Strengthening the  
Foundation & Audience  
Growth



On the  
Horizon



Brand USA

# THE FUTURE OF PARTNERSHIP WITH BRAND USA

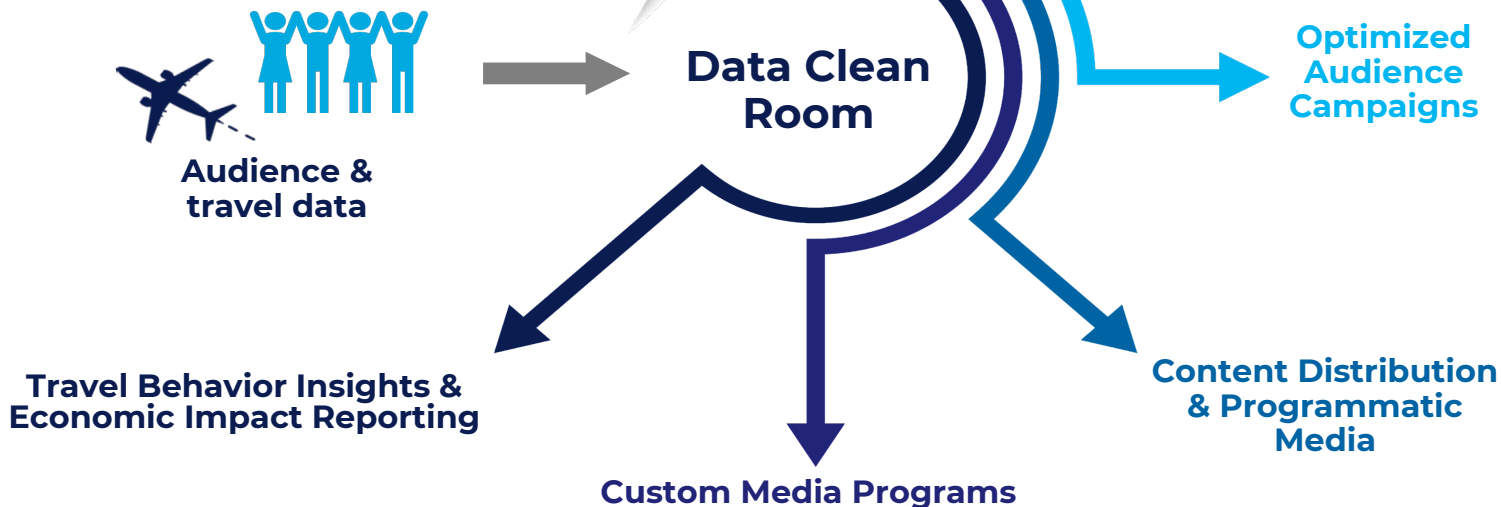


Strengthening the  
Foundation & Audience  
Growth



# Strengthening the Foundation & Audience Growth

Reach International Travelers with Impactful Messaging and Effective Targeting



# Strengthening the Foundation & Audience Growth

July 2023

Data  
Partnership  
Kickoff

Begin Building Unique  
Audience of  
International Travelers

March 2024

**20M+**  
First Party IDs  
Collected

**Launch Spring 2024  
Campaigns**

Use Data to Continue to  
Optimize Partner  
Programs

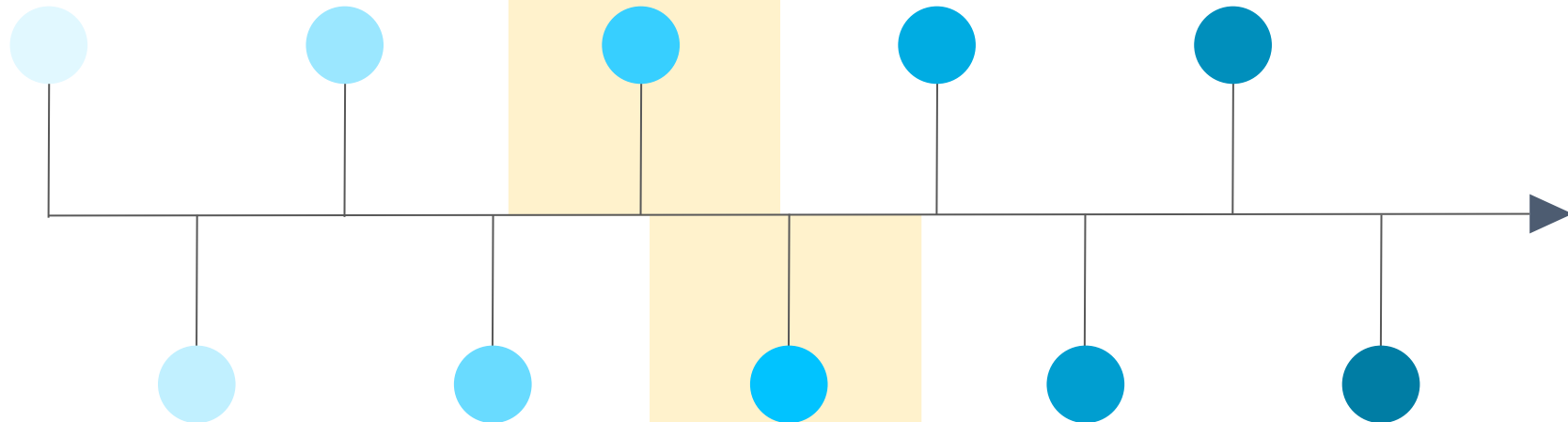
Setup Data Clean  
Room, SDK, and Media  
Tracking

Launch Campaigns to  
Reach, Retarget and  
Grow this Unique  
Audience

**\$967M**  
in Hotel Revenue  
Observed FY2024 YTD

Collect 100M+  
First Party IDs by  
September 30, 2024

Launch Programs with  
Enhanced Premium  
Targeting

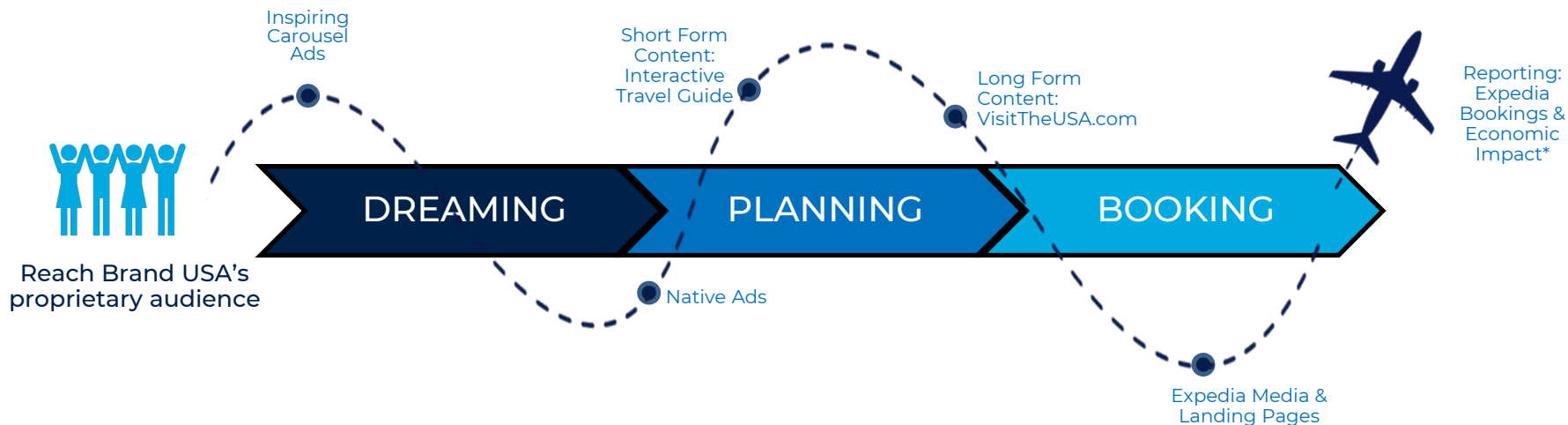


# Strengthening the Foundation & Audience Growth



## Optimized Audience Campaign

*Leveraging Brand USA's proprietary audiences to drive engagement and activation during key planning periods*



\*Varies by level of inclusion

# Strengthening the Foundation & Audience Growth

## Optimized Audience Campaign Enhancements



Increased  
Impressions



New Growth  
Markets



New Premium  
Layer



Maximize  
Media Budget



# Strengthening the Foundation & Audience Growth



Brand USA

# THE FUTURE OF PARTNERSHIP WITH BRAND USA



On the  
Horizon



# On The Horizon

We see three primary content opportunities for partner integration.



# Iconic American Road Trips

CREATING MOMENTUM OF ICONIC AMERICAN ROAD TRIP STORIES





Brand USA

# Sports

HARNESSING THE  
APPEAL & POPULARITY  
OF U.S. & GLOBAL  
SPORTS







# Americana Culture

**CELEBRATING  
THE CULTURAL  
PHENOMENA OF  
THE USA**



# Our Content Focuses Programs On the Horizon

**Creating Momentum  
of Iconic American  
Road Trip Stories**

**Harnessing the Appeal  
& Popularity of U.S.  
and Global Sports**

**Celebrating the  
Cultural Phenomena  
of the USA**



# Phased Campaign Timing

## CAMPAIGN TIMING DEVELOPMENT BASED ON EACH “MOMENT”

We are developing phased, multi-year approaches for campaign messaging to match each “moment” and defining how partners will be integrated into the timing...

... all with the goal of targeting travelers before, during and after major USA milestones.



# Program Development

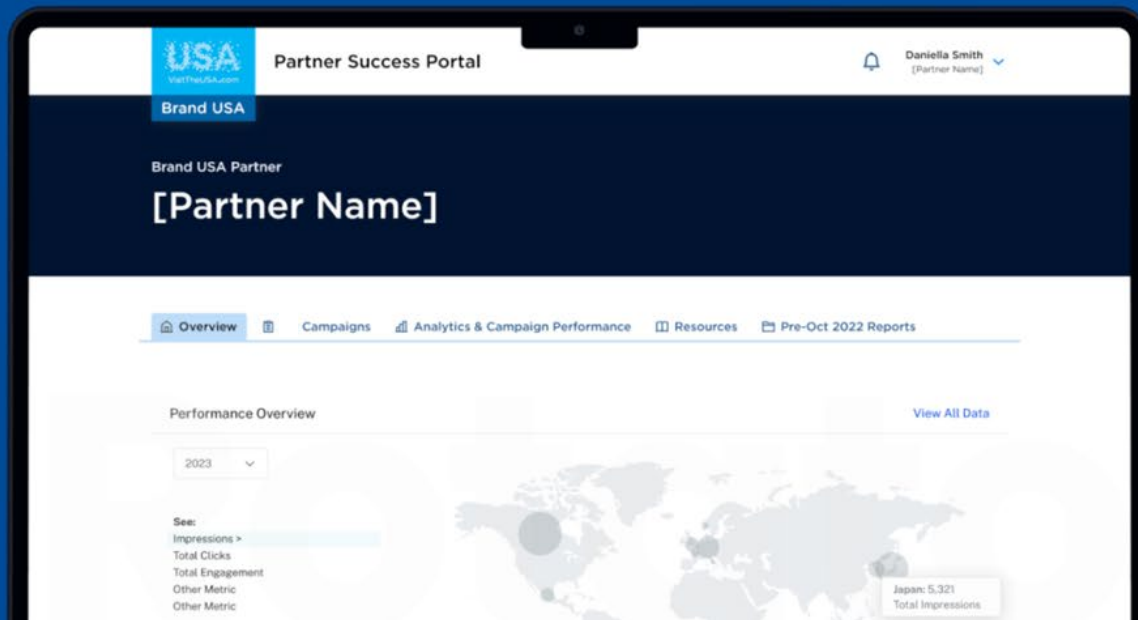
## OUR ROADMAP

To ensure proper partner integration, this process has been designed to allow for partners to get an early preview to both the campaign strategy and the creative process.

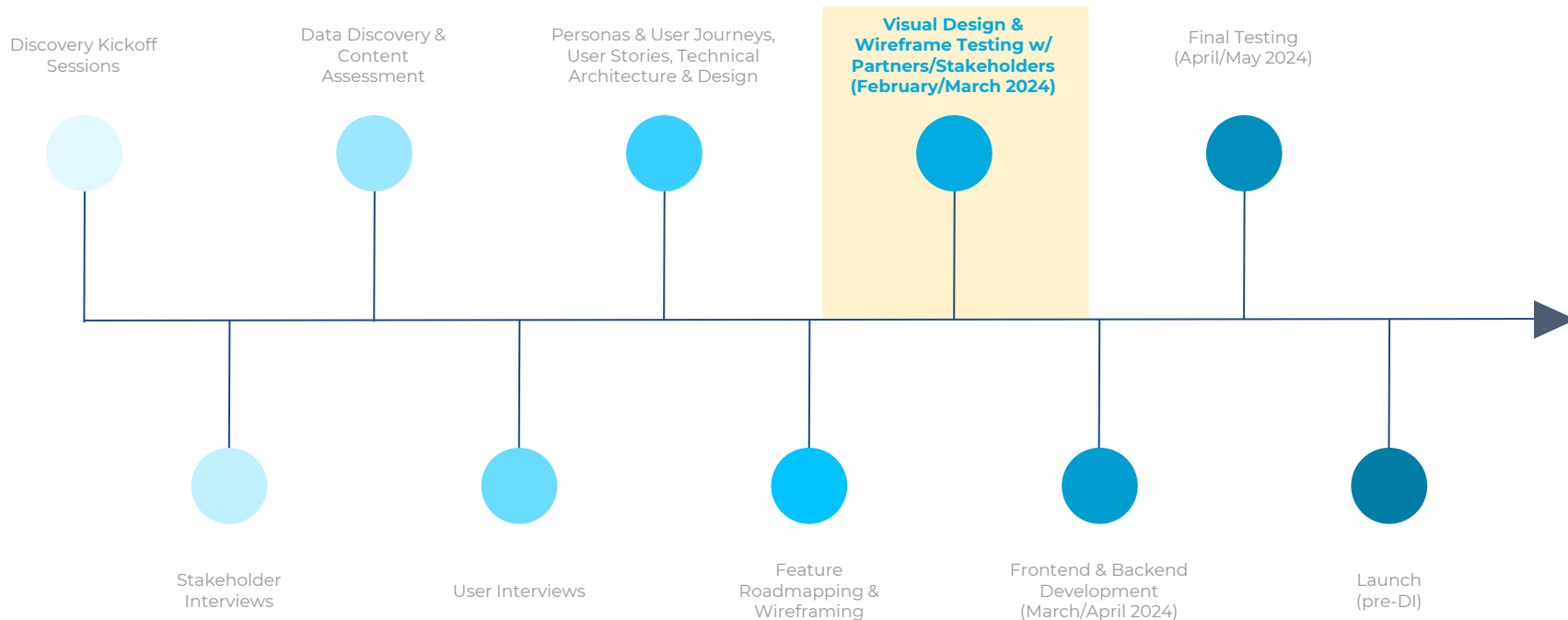
- 1 NEW BRAND INTEGRATION
- 2 INTEGRATED AGENCY STRATEGIC PLANNING
- 3 CREATIVE CONCEPT DEVELOPMENT
- 4 FINALIZED CO-OP PROGRAMS / INDUSTRY RELEASE



# A one stop shop for partners



# On the Horizon: Partner Success Portal





# On the Horizon: Partner Success Portal

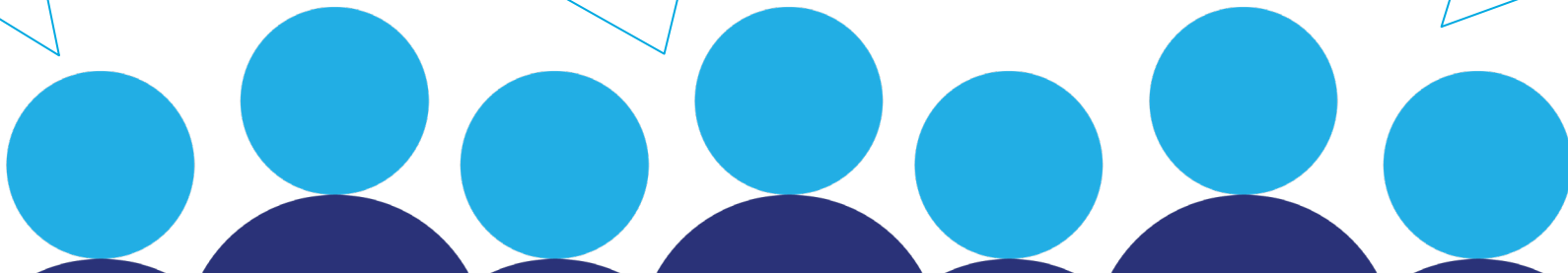
Overall even without color and functionality it is **definitely an improvement** from what it was

I think it's going to look great and there's lots of good functionality and it **goes beyond being a repository of PDF reports**

This is really what I was hoping to see, so this is so **exciting!**

It takes it to the next step to look at **analytics** and still give us access to calendar of events, and access to SharePoint. It's one portal, **one hub** even if there are multiple teams - we are all able to work and function in one place

**Easier** to access than anything I've had before





# 05

## Tools and Resources



# Additional Tools and Resources

## Global Programs

Globally Available Programs	Affinity Programs
<ul style="list-style-type: none"><li>• Global Inspiration Program*</li><li>• <a href="#">Interactive Travel Guide</a></li><li>• <a href="#">Programmatic Media Campaigns</a></li><li>• <a href="#">USA Discovery Program</a></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">ADARA</a></li><li>• <a href="#">Expedia</a></li><li>• <a href="#">Hotelbeds</a></li><li>• <a href="#">Lastminute.com</a></li><li>• <a href="#">Sojern</a></li><li>• <a href="#">TripAdvisor</a></li></ul>



# Additional Tools and Resources

## Market-Specific Programs

CA	<ul style="list-style-type: none"> <li>• <a href="#">Air Canada Vacations</a></li> <li>• <a href="#">Canada Loyalty Marketing Program</a></li> <li>• <a href="#">Optimized Audience Campaign*</a></li> <li>• <a href="#">Rogers Media</a></li> <li>• <a href="#">Travelweek Canada</a></li> </ul>
UK	<ul style="list-style-type: none"> <li>• <a href="#">Family Traveller</a></li> <li>• <a href="#">Hays Travel</a></li> <li>• <a href="#">Optimized Audience Campaign*</a></li> <li>• <a href="#">The Telegraph</a></li> <li>• <a href="#">Travelbag</a></li> </ul>
DE	<ul style="list-style-type: none"> <li>• <a href="#">CANUSA</a></li> <li>• <a href="#">Optimized Audience Campaign*</a></li> <li>• <a href="#">Ströer</a></li> <li>• <a href="#">TUI</a></li> </ul>
MX	<ul style="list-style-type: none"> <li>• <a href="#">Optimized Audience Campaign*</a></li> <li>• <a href="#">Pricetravel</a></li> <li>• <a href="#">Televisa</a></li> </ul>

IN	<ul style="list-style-type: none"> <li>• <a href="#">Optimized Audience Campaign*</a></li> <li>• <a href="#">The Times of India</a></li> </ul>
AU	<ul style="list-style-type: none"> <li>• <a href="#">Helloworld</a></li> <li>• <a href="#">Optimized Audience Campaign*</a></li> </ul>
FR	<ul style="list-style-type: none"> <li>• <a href="#">Optimized Audience Campaign*</a></li> </ul>
BR	<ul style="list-style-type: none"> <li>• <a href="#">Optimized Audience Campaign*</a></li> </ul>
SK, JP, CH, CO	<ul style="list-style-type: none"> <li>• <a href="#">Optimized Audience Campaigns for Growth Markets in Development - details coming soon</a></li> </ul>

# Market Deep-Dive Webinars are back!

Scheduled:

- Germany: Thursday, April 18 - mark your calendar!

Coming post-IPW:

- India
- China
- Japan, South Korea, Australia, New Zealand
- ... plus more!

Plus... bonus webinars about new Brand USA platforms:

- The Partner Success Portal
  - The USA Discovery Program
-



Brand USA



# The Partner Engagement and Marketing Team

## Leadership & Strategy



## Partner Engagement



## Partner Operations



## Programs & Coordination







# Thank You!