

The background of the slide is a scenic photograph of the Golden Gate Bridge in San Francisco. The bridge's iconic red-orange towers and suspension cables are visible, spanning across the frame. In the foreground, a sandy beach meets the ocean, with gentle waves washing onto the shore. The sky is a clear, vibrant blue with a few wispy white clouds. The overall lighting suggests a bright, sunny day.

Brand USA

# PUBLIC SESSION

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## Brand USA Board of Directors Annual Meeting

November 18, 2024

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Brand USA

# Chair Opening





# BRAND USA BOARD OF DIRECTORS



**Todd Davidson**

Brand USA Board Chair



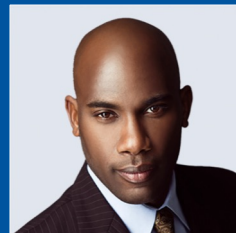
**Donald Moore**

Brand USA Board Vice Chair



**Elliott Ferguson**

Brand USA Board Treasurer



**Allen Orr**

Brand USA Board Secretary



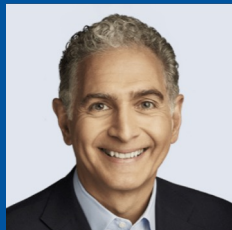
**Lauren Bailey**

Brand USA Board Member



**Kristen Esposito**

Brand USA Board Member



**Mark Hoplamazian**

Brand USA Board Member



**Mike Mangeot**

Brand USA Board Member



**Tim Mapes**

Brand USA Board Member



**Hari Nair**

Brand USA Board Member



**Stephanie Young**

Brand USA Board Member

# CHAIR OPENING

➔ **Call Meeting to Order**

➔ **Call for Vote**



Brand USA

# CEO Remarks



# CEO REPORT

## Reflections

➔ **New Leadership**

➔ **Priority Areas**

➔ **Recent Success**



# BRAND USA LEADERSHIP TEAM



**Fred Dixon**

President & CEO



**Angie Briggs**

Senior Vice President,  
Industry Partnerships  
and Engagement &  
Chief Development Officer



**Jake Conte**

Senior Vice President,  
General Counsel



**Chris Heywood**

Senior Vice President,  
Public Relations & Chief  
Communications Officer



**Monica Lopez**

Chief of Staff & Culture



**Don Richardson**

Chief Financial, Diversity &  
Inclusion Officer



**Janette Roush**

Senior Vice President,  
Innovation & Chief AI Officer



**Malcolm Smith**

Senior Vice President,  
Global Markets & Chief Trade  
and Product Development  
Officer



**Aaron Wodin-  
Schwartz**

Chief Corporate Affairs Officer



**Chief Marketing  
Officer**



# PRIORITY AREAS

01

Global Communications

02

Innovation & AI

03

Partner Engagement

04

Trade & Product Development

05

Meetings & Incentive Travel

06

Global Events

Brand USA





# U.S. Inbound Travel Landscape





# OUTLINE

1. **2024 YTD Visitation and Spending:** Double-digit growth
2. **2024 Air Capacity and Accessibility:** Above pre-pandemic
3. **Visitation Forecast:** Strong growth, moderate pace

# Total International Travel to the U.S. 2024 YTD (Jan-Aug)

10%

YTD YoY %  
Change

48M

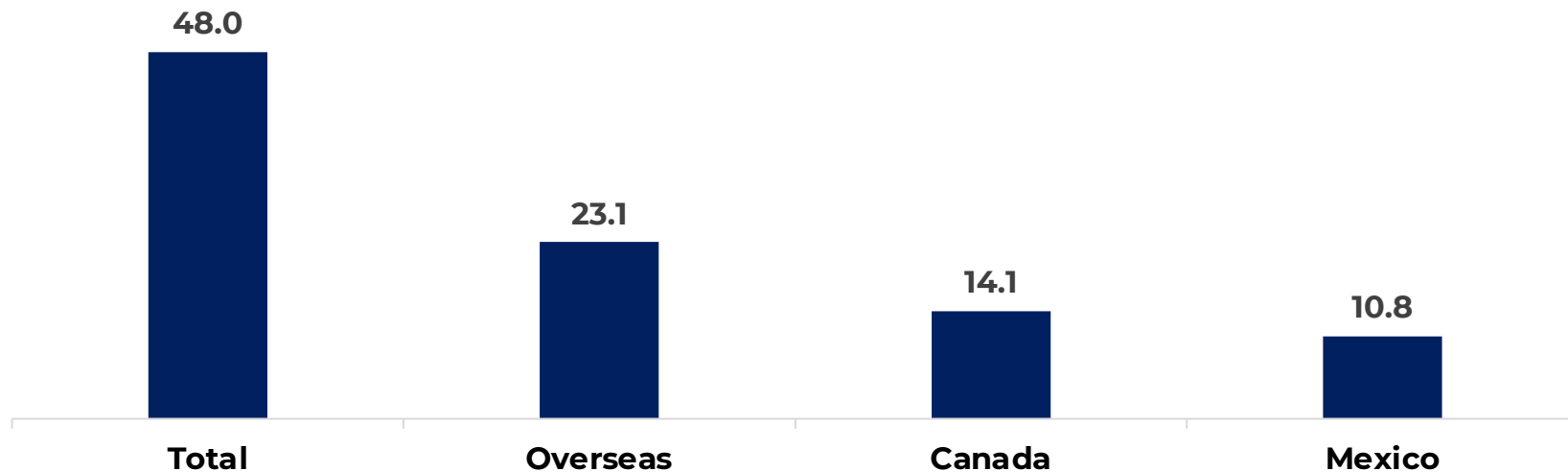
YTD (Jan – Aug)

90%

of 2019 levels

# 2024 YTD (JAN-AUG): TOTAL INTERNATIONAL TRAVEL TO THE U.S.

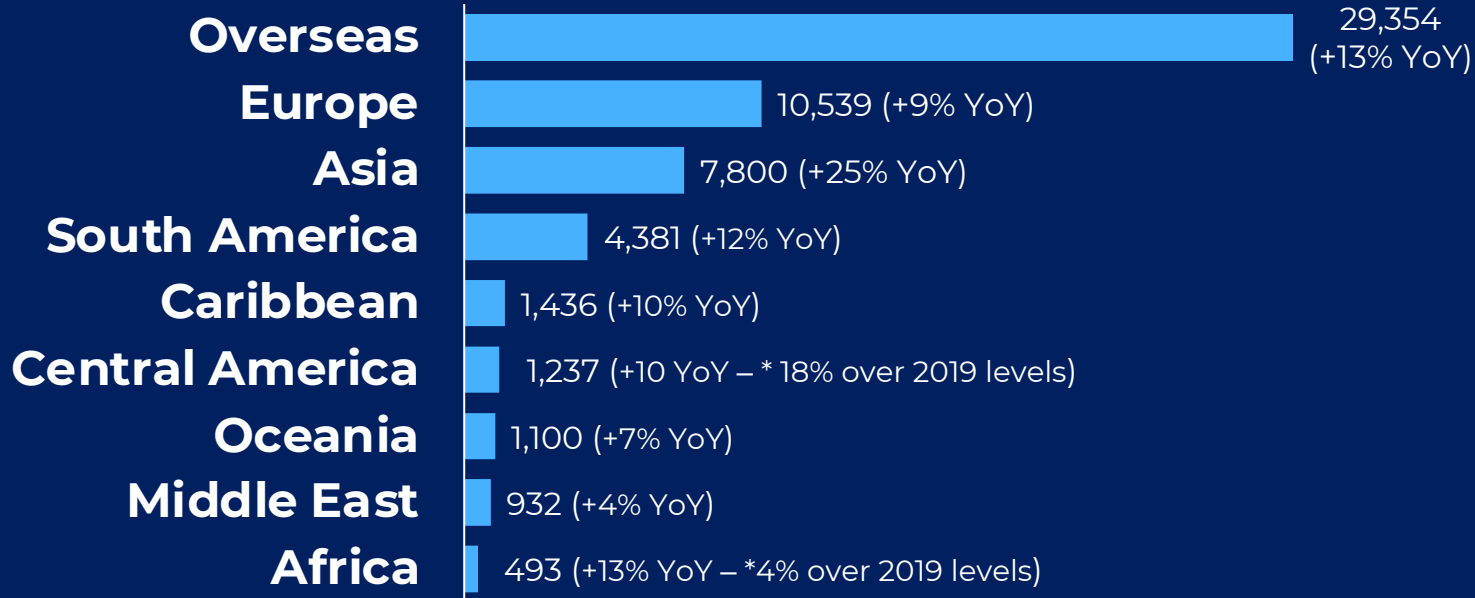
(Visitation in millions)





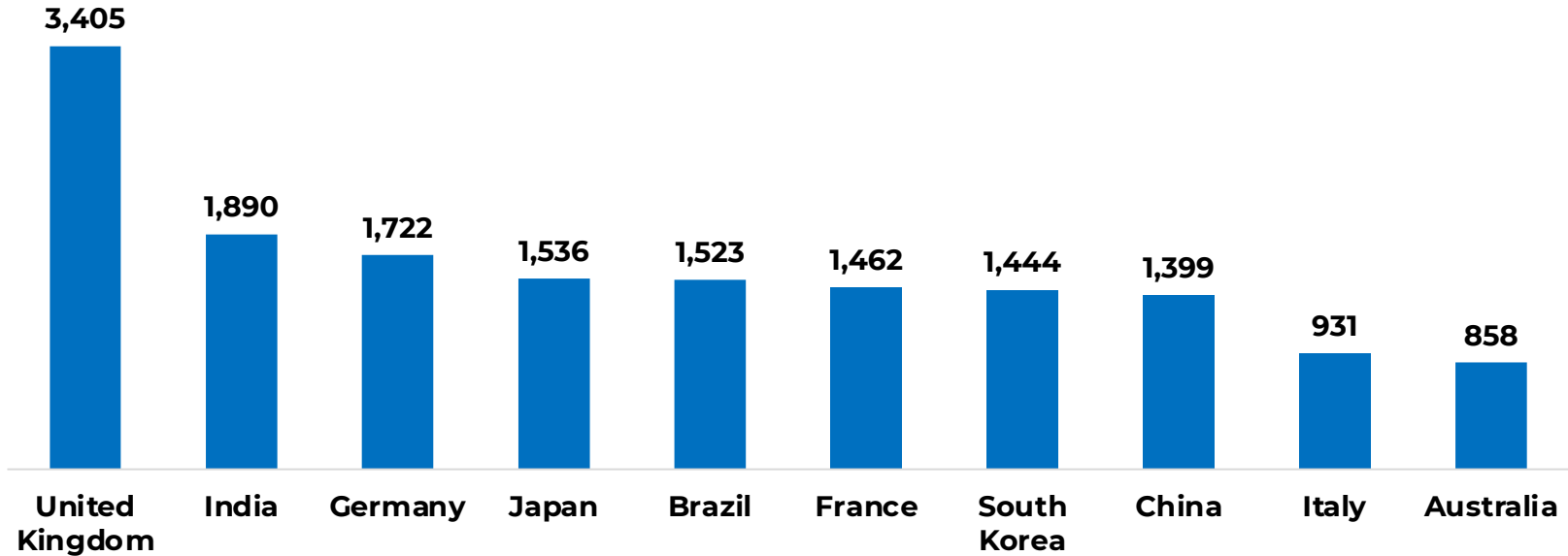
## 2024 YTD (JAN-OCT): OVERSEAS TRAVEL TO THE U.S.

(Visitation in thousands)



# 2024 YTD (JAN-OCT): TOP 10 OVERSEAS INBOUND MARKETS TO THE U.S.

(Visitation in thousands)



# Total International Travel Spending to the U.S. 2024 YTD (Jan-Sep)

14%

YTD YoY %  
Change

\$189.3B

YTD (Jan – Sep)

+6%

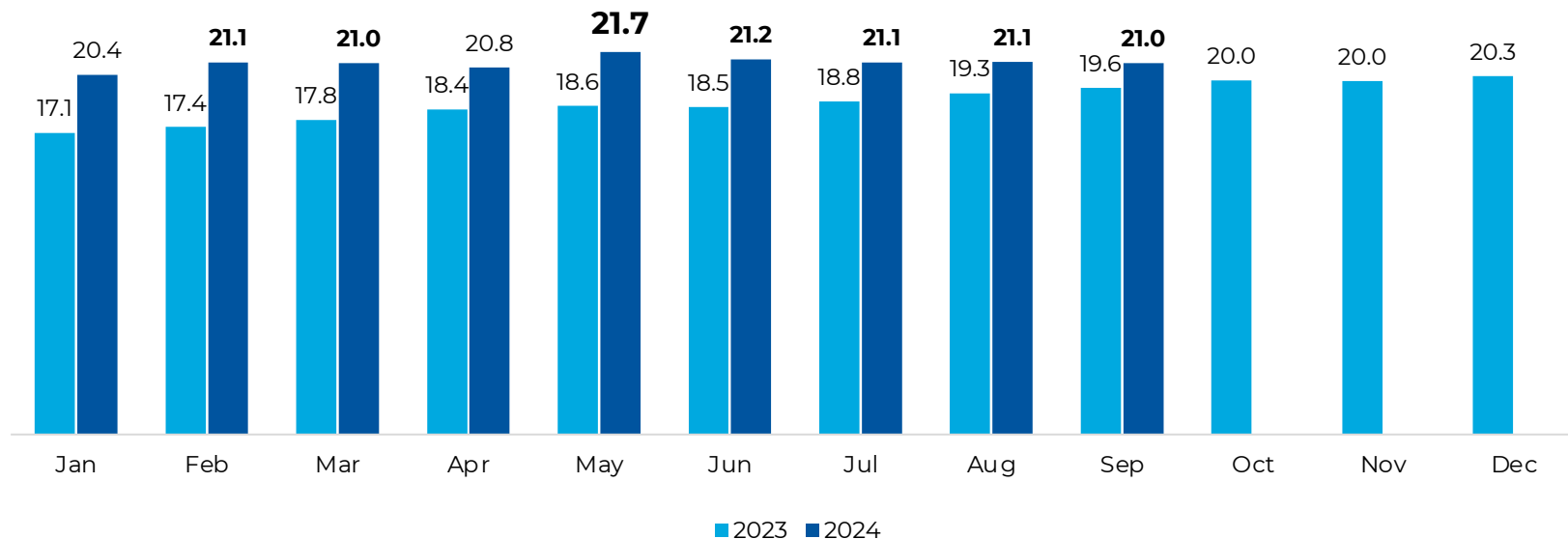
Over 2019 levels



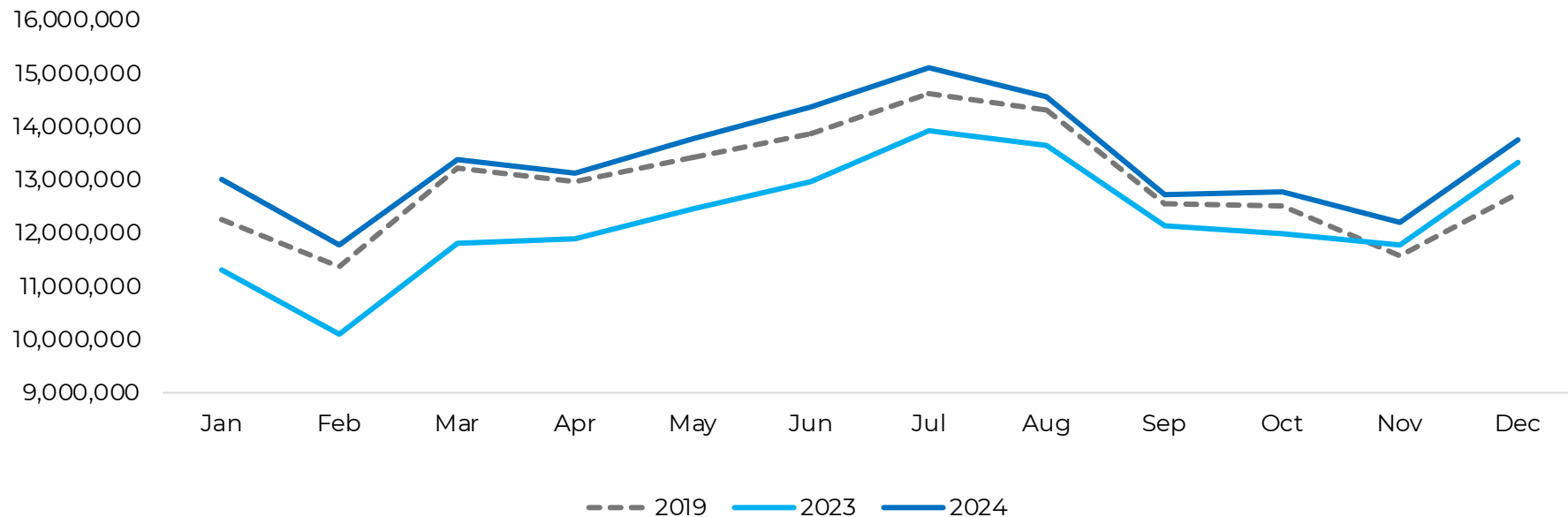


# 7 MONTHS OF SPENDING ABOVE \$21B THIS YEAR

(spending in billions)

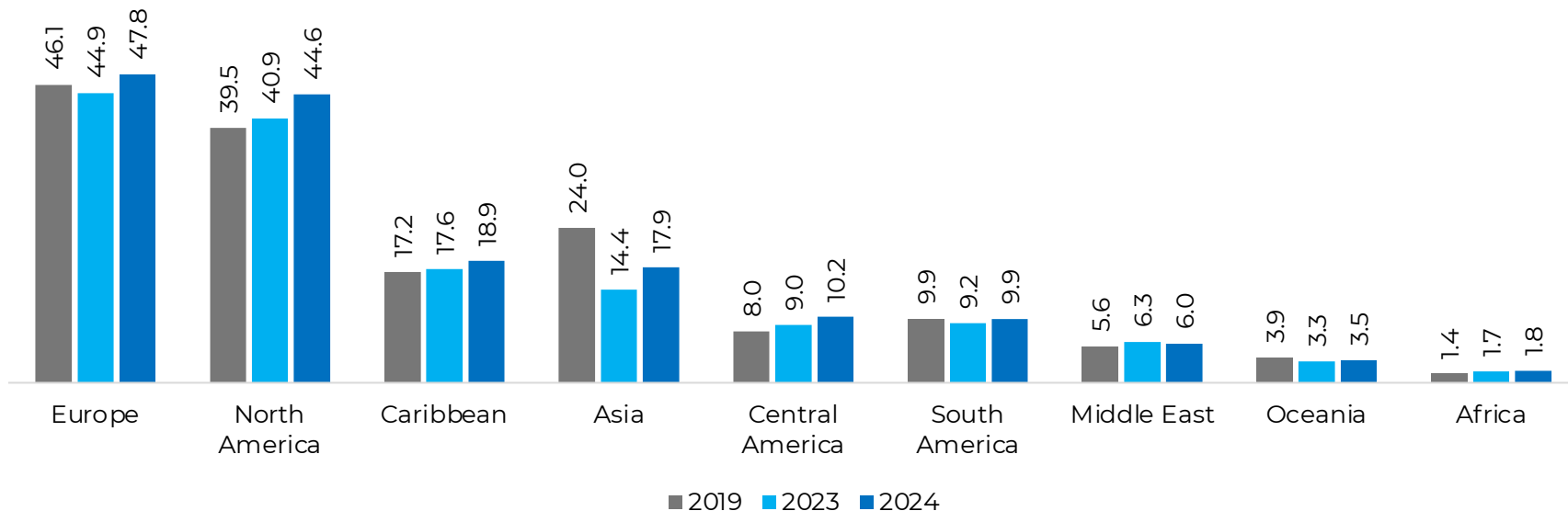


# U.S. INBOUND SCHEDULED AIR CAPACITY



# 2024 U.S. INBOUND SCHEDULED AIR CAPACITY BY REGION

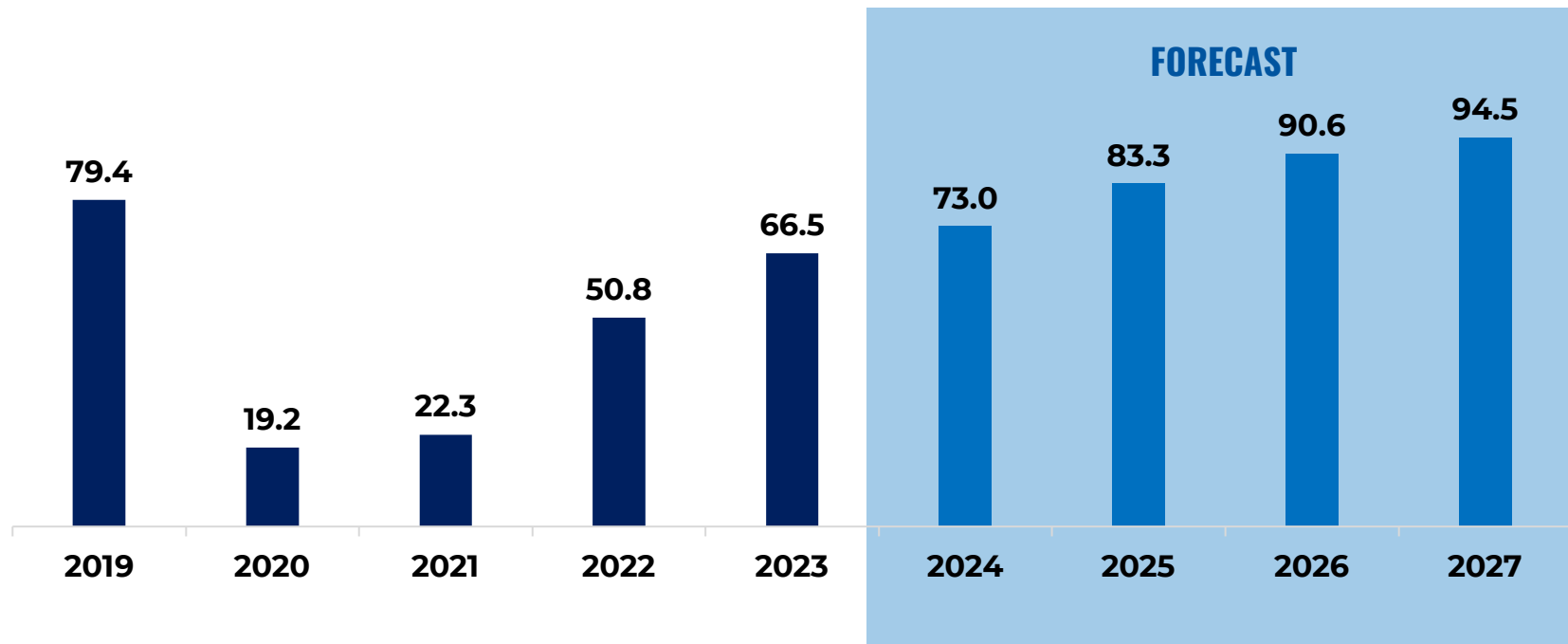
(Seats in millions)





# TOTAL INTERNATIONAL TRAVEL TO THE U.S.

(Visitation in millions)



# KEY TAKEAWAYS

## Strong recovery:

1. 13% increase in overseas arrivals
2. Visitor spending up 14% YoY
3. Air capacity exceeding pre-pandemic levels

Brand USA

# FY24 PRELIM CLOSE





# FY24 PRELIMINARY YEAR-END FINANCIAL HIGHLIGHTS

(As of September 30, 2024)

- **Revenue**

Total revenue YTD: \$132.58M

Cash Contributions: \$68.49M

In-Kind Contributions: \$62.82M

Sponsorships and Other: \$1.27M

- **Expenses**

Total Program Expenses: \$253.11M

- **Cash**

Cash Reserves are strong

- **Travel Promotion Fund**

Met the match requirements for FY24

Brand USA

# FY25 Highlights



# FY25 OBJECTIVES

1

Establish and maintain the USA as the preferred global travel destination

2

Contribute to community prosperity by driving international visits and spend

3

Lead & engage stakeholders of the U.S. travel industry

4

Maintain excellent organizational integrity and reputation, setting the standard for the global travel industry



# EXPEDIA X BRAND USA





A Somewhere  
for Everyone

Eagle Fern Park, Oregon, USA

Find yours



# A 360° partnership with Expedia

**Together, we've created a comprehensive full-funnel co-op campaign:**

- Objective: encourage multi-city dispersal while negating the perception that planning a vacation to the US needs to be complex.
- Target Markets: Canada and Japan
- Timing: November 12th 2024 through February 2025
- KPIs:
  - Awareness: Brand Perception, Search Uplift
  - Engagement: Site visitation, VTR, CTR, VCR, Time spent with Content
  - Conversion: Increase in # of visitors, Visitor Frequency, ROAS, Room Nights

**In addition, this partnership has unlocked new B2C and B2B opportunities with Expedia.**

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Platform

# A Somewhere *for* Everyone

# A full funnel ecosystem to inspire and cue conversions

## GRAB ATTENTION

High impact inspiration showcasing the breadth of what the USA has to offer

KPI: Awareness



Hero Film: 30  
OLV, CTV, YouTube (Paid & Organic)

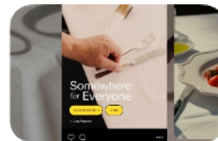
## STAY RELEVANT

Deep dive into USA **road trip destinations** through passions in contextual placements

KPI: Consideration



Vignettes :15  
OLV, CTV, Paid Social, YouTube  
(Paid & Organic)



Social Extension  
Paid & Organic Social



OOH  
Dynamic Digital

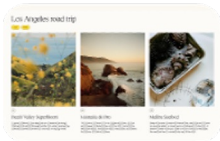


Sponsored Editorial  
Expedia Magazine & Social

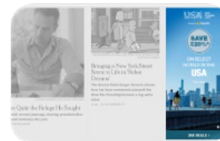
## DRIVE ACTION

Empower the decision to book a trip to the USA, with Expedia

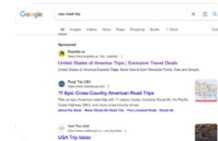
KPI: Bookings



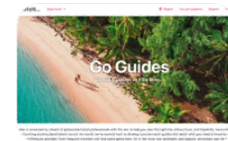
Editorial Tritineraries  
Microsite



Banners  
Onsite & Offsite MeSo Display



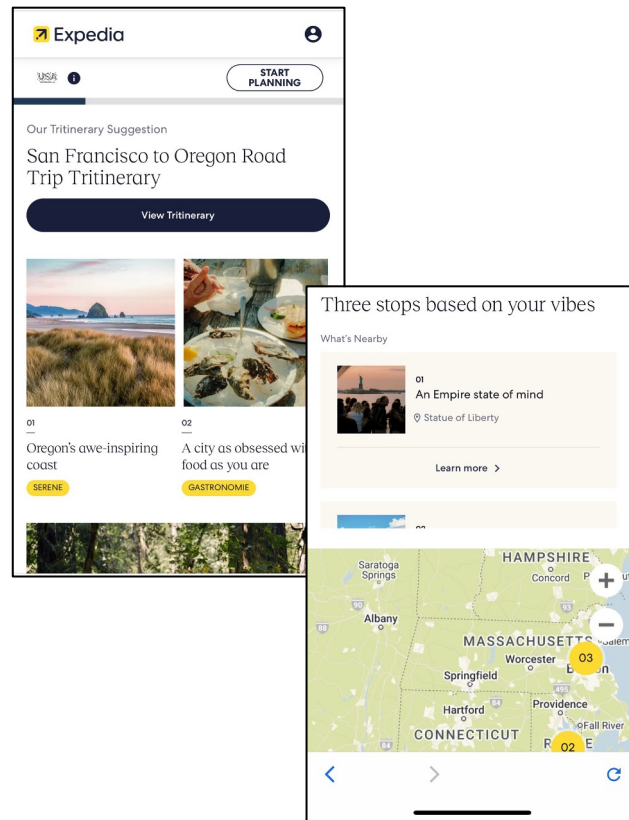
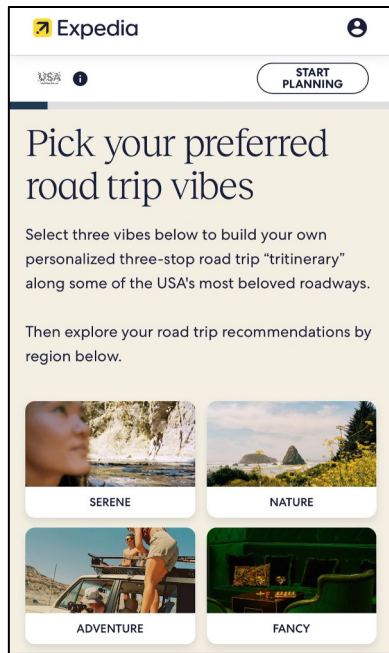
SEM  
Keyword & Sitelinks



Go Guides  
hotels.com



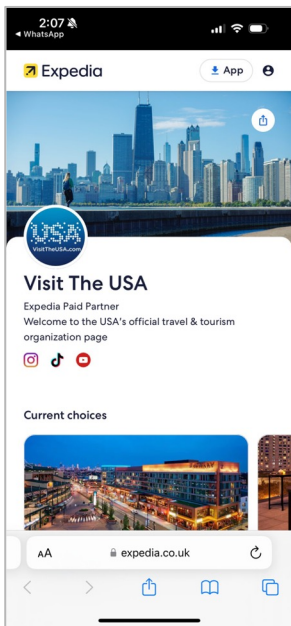
# From *Vibes* to bookable Tri-Tineraries





# New Opportunities Unlocked

## Expedia Travel Shops



## Expedia B2B Network





### Join our webinar with Brand USA

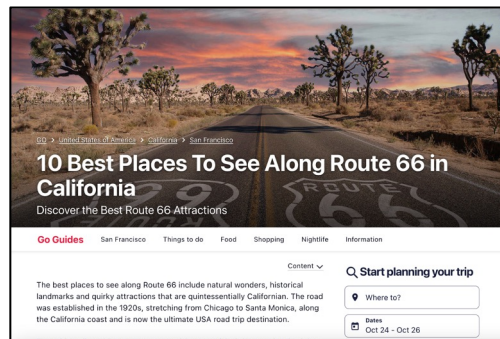
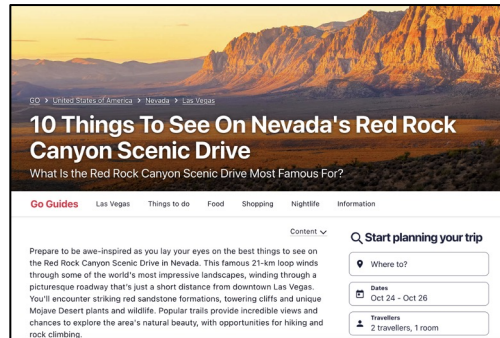
**Date:** October 8, 2024  
**Time:** 3:00pm ET  
**Host:** Beata Kaminski, Account Manager, Expedia TAAP  
**Guest Speaker:** Casey Canevari, Global Trade Development (Canada), Brand USA

We're excited to invite you to an exclusive webinar hosted by Expedia TAAP, featuring insights from **Brand USA** on their latest initiatives designed to empower travel advisors like you.

**About Our Guest Speaker:** Casey Canevari is responsible for building and maintaining relationships with Canadian travel trade partners at Brand USA. With a focus on market activations, co-op marketing programs, and budget oversight, Casey's role is instrumental in promoting U.S. destinations to Canadian travellers.

**What You'll Learn:**

## SEM to Hotels.com



# GLOBAL TRADE

Brand USA

# FY25 MISSIONS



**Jan. 13-17, 2025**

Mexico Sales Mission

**Jan. 19-24, 2025**

India Sales & Media Mission

**Feb. 13, 2025**

Australia B2B

**March 17-21, 2025**

South America Mission

**April 28-May 2, 2025**

Canada Connect East

**May 20-23, 2025**

Canada Connect West

**July 21 – 25, 2025**

Japan & South Korea Sales Mission

Brand USA

# INDIA SALES MISSION

Hyderabad January 19 - 24, 2025

**Sold Out:**

- **44 companies**
  - **58 attendees**
- 





# INDIA MEDIA MISSION

Hyderabad January 19 - 24, 2025

- 10 organizations
  - 10 delegates
- 





# INDIA CEO IMMERSION

Hyderabad January 18 - 24, 2025

- Showcase India's opportunity, possibility, and potential
- Gain a greater understanding of the travel, media, consumer, economic landscapes of the market.

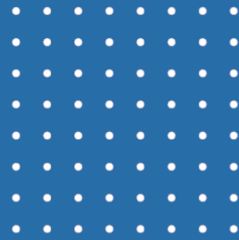




Objectives 2 & 3

# TRAVEL WEEK U.K. & EUROPE

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# BRAND USA TRAVEL WEEK



U.K. & EUROPE 2024



## BRAND USA MEDIA FORUM



## BRAND USA CEO SUMMIT

**OCTOBER 21-24, 2024**

LONDON - etc VENUES COUNTY HALL



# ALL TRACKS IN NUMBERS



917

ATTENDEES

179

EXHIBITOR  
ORGANIZATIONS

183

BUYER  
ORGANIZATIONS

83

MEDIA  
ORGANIZATIONS

20

MARKETS

4

VENUES

5

EVENING EVENTS

9

SPONSORS

6,861

PRE-SCHEDULED  
APPOINTMENTS

11

MARKET  
UPDATES

19

ENRICHMENT  
SESSIONS

60

ENRICHMENT SESSION  
SPEAKERS

# MEDIA COVERAGE HIGHLIGHTS

## Interview: Brand USA chief executive Fred Dixon



By Robin Searle | October 21, 2024, 07:00



The new boss of America's destination marketing organisation tells Robin Searle why he is optimistic for future growth

## Travel Weekly U.K.

## La Brand Usa Travel Week UK & Europe apre i battenti di un'edizione record

21 ottobre 2024 15:01



Ha aperto i battenti oggi a Londra la Brand Usa Travel Week UK & Europe.

La Travel Week, lanciata nel 2019, si è affermata come un evento chiave per mettere in contatto buyer ed espositori di Regno Unito ed Europa con un focus specifico sugli Stati Uniti. Con l'edizione del 2023,

l'evento ha raggiunto numeri straordinari con 794 partecipanti, tuttavia, la Travel Week 2024 promette di superare tali risultati, con una crescita significativa del 26% nel numero di espositori presenti rispetto allo scorso anno.

L'edizione 2024 vede la partecipazione di 183 buyer britannici ed europei con oltre 179 espositori statunitensi, che si incontreranno per un totale di 5.443 incontri programmati, segnando una cifra da record.

## Quotidiano Travel Italy



## FVW Germany

## Nearly 17 million Europeans expected to visit the United States in 2025

Brand USA Travel Week UK & Europe in London

On the occasion of Brand USA Travel Week UK & Europe, Fred Dixon, CEO of Brand USA, who was participating for the first time, announced that in 2025, nearly 17 million European travelers would go to the United States, a record.

Nearly 17 million Europeans expected to visit the United States in 2025  
Reviewed by Peter  
00:00 00:00

Written by Celine Eymerly on Tuesday October 22, 2024



## Tourmag France

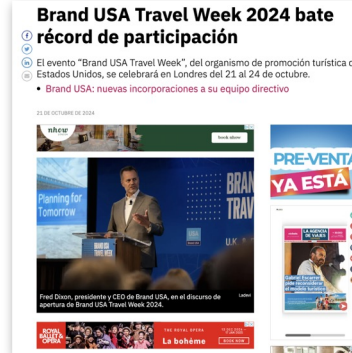
## Brand USA Travel Week 2024 vuelve a Londres batiendo récords de participación

Brand USA cierra su Brand USA Travel Week 2024 con cifras récord de asistentes y reuniones, consolidándose como una plataforma clave para el crecimiento del turismo estadounidense.

24 DE OCTUBRE 2024 08:00



## Hosteltur Spain



## Ladevi.info Spain

# Other Board Business



# LEADERSHIP ELECTIONS

- **Chair**
    - Elliott Ferguson, President & CEO Destination DC
  - **Vice Chair**
    - Lauren Bailey, CEO and Co-Founder, Upward Projects
  - **Treasurer**
    - Kristen Esposito, Principal, Esposito Global Partners
  - **Secretary**
    - Allen Orr, Founder, Orr Immigration Law Firm
-





# LOOKING AHEAD

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# Thank you.

## CONSUMER

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## INDUSTRY

 TheBrandUSA.com

    @BrandUSA