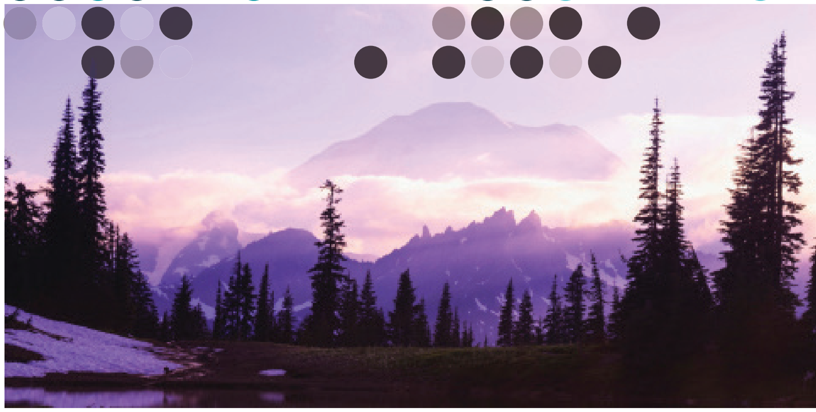

USA

DiscoverAmerica.com

Brand USA

FY13 Marketing Plan
February 2013

Discover America .com

About this Plan

This plan maps out the strategies and tactics Brand USA has developed to achieve its mandate of making the United States the world's premier travel destination.

It provides a review of the campaign, programmatic activities, and successes Brand USA has achieved to date and a look ahead at the programmatic activities and consumer marketing plans Brand USA is developing to add and create value for our partners.

Much of the content of this plan was developed in collaboration with the industry and our partners—with a wealth of research guiding our way to help ensure Brand USA is building and executing programs in the right markets that will deliver the right messages at the right time. In doing so, we will be able to inspire more and more international travelers to discover the United States—again or for the first time.

As we develop additional programs and platforms in collaboration with our partners and the industry—and as we measure the success of those initiatives—we will update this plan.

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About Brand USA

Brand USA was established by the Travel Promotion Act to spearhead the nation's first international marketing effort to promote the United States as a premier travel destination and communicate US entry/exit policies and procedures. Formed as the Corporation for Travel Promotion, the public-private entity began operations in May 2011 and does business as Brand USA.

Through its consumer facing brand and call-to-action—Discover America—Brand USA inspires travelers to explore the United States of America's boundless possibilities.

This first-ever effort is expected to put the United States on equal footing with other countries' tourism efforts and bring millions of new international visitors to the United States who spend billions of dollars during their travels—thus creating thousands of new American jobs each year.

Brand USA works in close partnership with the travel industry to maximize the economic and social benefits of travel—all at no cost to US taxpayers.

The organization is supported by contributions from the private-sector that are matched by fees paid by international travelers to the Electronic System for Travel Authorization (ESTA) program. ESTA is an automated system implemented by the Department of Homeland Security in 2008 that determines the eligibility of visitors from 37 international markets to travel to the United States under the Visa Waiver Program (VWP). ESTA authorizations are generally valid for multiple trips over a period of two years or until the traveler's passport expires, whichever comes first.

For industry or partner information about Brand USA, visit **www.TheBrandUSA.com**. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at **www.DiscoverAmerica.com**.

Mission

The mission of Brand USA is to encourage increased international visitation to the United States and to grow America's share of the global travel market. In doing so, we aim to bring millions of new international visitors who spend billions of dollars to the United States, creating tens of thousands of new American jobs.

Vision

Brand USA will be responsible for positioning and promoting the United States as a compelling destination for international travelers, inspiring visitors with a refreshed understanding that there is no place in the world like the United States of America with its limitless destinations and attractions. We will build a world-class team and organization that will execute an integrated marketing and communications strategy designed to deliver the highest possible return for the United States—in the form of job creation, GDP and export growth, and increased federal tax revenues.

Our Role in the Travel Industry

Brand USA plays a unique role as the nation's first cooperative destination marketing organization.

We focus our efforts on delivering programs and platforms that increase awareness and enhance the image of the United States among worldwide travelers in order to influence intent to travel to the United States and, most importantly, visitation and spend. In addition to promoting the United States as a premier travel destination through consumer and travel trade marketing, advertising, events and promotions, we work with the Federal government to communicate US entry and security processes that will help make the journey to and into the United States easier and more welcoming.

The collective and successful efforts of Brand USA, the US Department of Commerce Travel and Tourism Advisory Board, and the US Travel Association will increase the desire and ability for international travelers to come to the United States. And as we welcome millions of new international visitors, we make our country stronger—creating jobs essential to the economy and providing opportunities for millions of Americans.

LEADERSHIP ROLES IN THE TRAVEL INDUSTRY TO INCREASE INBOUND TRAVEL TO THE UNITED STATES

TRAVEL & TOURISM INDUSTRY

USA DiscoverAmerica.com

Brand USA

PROMOTE

- Lead the nation's global marketing effort to increase inbound travel to the United States
- Enhance awareness and the image of the USA as a diverse, exciting, and premier travel destination
- Create programs and platforms that add and create value for partners and support the National Travel and Tourism Strategy
- Work with the Federal agencies to develop programs to communicate US entry and security processes and create a welcoming experience for international tourists

ADVISE

DEPARTMENT OF COMMERCE UNITED STATES OF AMERICA

Advise and provide policy recommendations to the Secretary of Commerce on issues affecting the US Travel Industry

U.S. TRAVEL ASSOCIATION

ADVOCATE

- As the leading voice of the US travel industry, increase travel to and within the United States
- Advocate for and advance pro-travel policies and remove travel barriers
- Provide authoritative research and networking opportunities
- Communicate the positive widespread impact of travel to policy makers and the media
- Leverage the collective strength of everyone who benefits from travel to grow their business beyond what they can do individually

Situation Analysis

Where We Are

A strengthening but still struggling economy

The year opened with the United States in modest economic recovery. Unemployment was 7.8%, (down from 8.5% in December 2011) with early indications of a strengthening housing market. Despite these bright spots, most economists are forecasting annualized growth in the range of 2% for 2013.

Stable exports are more critical than ever to the short- and medium-term vitality of the US economy—exports that play a vital role in supporting jobs.

The Opportunity

Travel: The fastest path to a strong economy, jobs and opportunities for Americans

It is a truth that travel is a powerful economic engine—with international inbound travel one of the largest exports for the United States. Ranking ahead of agricultural goods and motor vehicles, it is the single-largest services sector export, accounting for 25% of all services exports in 2011.

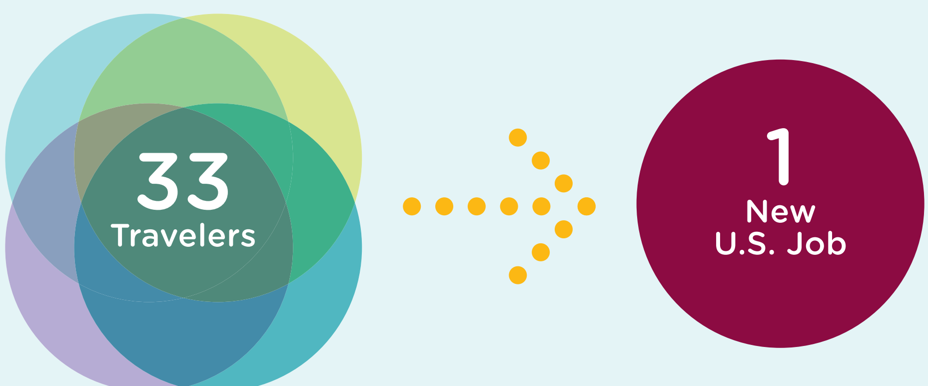
International travel represents a quick path toward economic prosperity, providing skilled and high-paying jobs that can't be outsourced.

According to the Department of Commerce, in 2011, 62 million international visitors came to the United States and spent a record $153 billion on goods and services, which are counted as US exports. In total, spending by international travelers while traveling the United States supported 1.2 million American jobs.

According to studies by the US Travel Association, travel supports 14.4 million workers in America—with travel supporting one in eight American jobs in the private sector and ranking as a top 10 employer in 47 states plus the District of Columbia.

THE OPPORTUNITY

- Global travel is **booming** – expected to double to **$2.1 trillion by 2020**
- Arrivals to the United States are expected to increase **36%** from **59.7 million travelers in 2010** to **81 million travelers in 2016**
- Equates to an additional **$88 billion** in revenues and **629,000 jobs**



Source: U.S. Travel Association

The National Travel and Tourism Strategy sets a goal of welcoming 100 million visitors to the United States by the end of 2021.

International travel forecast to the United States

According to the Department of Commerce, through July 2012 visitation (37.6 million) was up 6% compared to the same period in 2011. The Department of Commerce also forecasts 3.6%-4.3% average annual growth in travel and tourism over the next five years. Forecasts show an estimated 66.5 million international visitors in 2012 and 69.2 million in 2013, both record numbers.

The Department of Commerce forecasts growth from all world regions over the period from 2011 through 2017, ranging from a modest increase for the Caribbean (+3 percent) to a high for Asia (+64 percent), South America (+60 percent), and Oceania (+41 percent). Countries with the largest total projected growth percentages are China (+259 percent), Brazil (+83 percent), Argentina (+67 percent), South Korea (+51 percent), India (+47 percent), Australia (+46 percent), and Venezuela (+45 percent).

In 2013, the US Travel Association projects a 4% increase in international inbound travel and a 7.1% increase in international spending. Overall, the industry is expected to add nearly 100,000 jobs in 2013.

The Competition

Regaining our share of the world travel market

Despite these gains, the United States' share of the world travel market remains well below pre-September 11, 2001, figures. The United States ranks second to France in terms of total international arrivals. And the United States faces new competition from emerging economies like China, Hong Kong, Malaysia, and Thailand. Competitor destination countries are spending upwards of $150 million a year to attract more travelers.

The United States has largely missed out on the global travel boom of the past few years. According to the US Travel Association, the nation's share of long haul arrivals is still well below historic levels, having declined from 17% in 2000 to 12.4% in 2011. According to the US Travel Association, other countries are seeing double and even triple the level of growth rates from Brazilian, Chinese, and Indian travelers, all of whom have high spend-per-trip figures ($5,605; $7,107; and $6,664; respectively).

In this increasingly competitive environment, the work of Brand USA is more critical than ever for the USA to regain its share of the world travel market and accomplish the goal set by the National Travel and Tourism Strategy of welcoming 100 million visitors to the United States by the end of 2021.

Brand USA is focused on markets that supply international travelers to the United States. Throughout 2013, a strong combination of consumer marketing and trade outreach will be active in each of the top 10 markets that generate the majority of international inbound travel and spend to the United States.

Top 10 Markets: 2011 International Visitation to the USA

RANK	COUNTRY	2011 ARRIVALS
1	**CANADA (+7%)** Canada improved its position as the leader in arrivals to the United States, due to a 7% increase from 2010, setting a second-straight record. Through December, visitor volume had increased for 26 consecutive months. The increase of 1.4 million visitors in 2011 was—by far—the largest of any visitor origin country. Canada accounted for a 34.0% share of 2011 visitor volume, a record high.	**21.34 MILLION**
2	**MEXICO (+0%)** Mexico visitor volume ticked up ever-so-slightly in 2011. However, visitor volume remains down 836,000 from the 2007 record of 14.3 million. As usual from this market, monthly performance throughout the year produced no discernible patterns. Mexico accounted for a 21.5% share of 2011 visitor volume.	**13.49 MILLION**
3	**UNITED KINGDOM (-0%)** United Kingdom visitor volume also was down slightly in 2011. The 2011 decline was small, but built on the large 15% drop in 2009 and the small decline in 2010. Following a solid recovery from the volcano-induced declines in April 2010, monthly performance tailed off the rest of the year. Visitation remains well below the 2000 record of 4.7 million. The U.K. accounted for a 6.2% share of 2011 visitor volume.	**3.84 MILLION**
4	**JAPAN (-4%)** The March tsunami and its aftermath spoiled the optimism for the return of this key market created by 2010's 16% increase. Monthly performance improved throughout the year after May and was nearly positive the final three months of the year. Visitor volume remains well below the 1997 record of 5.4 million visitors. Japan accounted for a 5.2% share of 2011 visitor volume.	**3.25 MILLION**
5	**GERMANY (+6%)** The 2011 performance continues the "up-and-down" trend seen over the past 11 years—visitation has declined five times and increased six times, including 2011. Monthly performance throughout 2011 reflected a similar lack of defining trend. The 2011 visitation level remains below the record 2.0 million set in 1996. Germany accounted for a 2.9% share of 2011 volume.	**1.82 MILLION**
6	**BRAZIL (+26%)** Brazil continued its march up the top-ten ladder by leap-frogging over France with significant growth in 2011, extending the arrivals expansion streak to eight years and setting a second consecutive record. Brazil has now posted double-digit growth in 7 of the past 8 years. The OTTI Travel Forecast calls for Brazil and Germany to vie for the #5 spot in 2013. Brazil accounted for a 2.4% share of 2011 visitor volume.	**1.51 MILLION**
7	**FRANCE (+12%)** France slipped to the #7 spot despite a solid 12% gain in 2011 that set another volume record. Mirroring Germany, France's 2011 performance continues the "up-and-down" trend posted over the past 11 years—visitation has declined five times and increased six times, including 2011. France accounted for a 2.4% share of 2011 visitor volume.	**1.50 MILLION**
8	**SOUTH KOREA (+3%)** South Korea posted an increase of 3% in 2011 to set a second consecutive record, but the performance was unimpressive following the dramatic 49% increase in 2010 and in relation to much loftier expectations for 2011 and beyond following inclusion in the Visa Waiver Program in late 2008. South Korea accounted for a 1.8% share of 2010 visitor volume.	**1.15 MILLION**
9	**CHINA (+36%)** China's 36% increase in 2011 visitor volume catapulted the country into the top ten list by surpassing both Italy and Australia. The performance was the best among the top 39 origin markets. The OTTI Travel Forecast calls for China to continue to move up a spot in ranking in each of the next two years. China accounted for a 1.7% share of 2011 visitor volume.	**1.09 MILLION**
10	**AUSTRALIA (+15%)** Australia built on steady progress and yielded its seventh straight record year with a 15% growth from 2010, and the market surpassed the one million arrivals market for the first time. Despite this strong performance, China's 36% increase pushed the country down one position in ranking. Australia accounted for a 1.7% share of 2011 visitor volume.	**1.04 MILLION**

Source: OTTI 2011 Overseas Visitor Profile

Top 10 Markets: 2011 International Visitor Spending in the USA

RANK	COUNTRY	2011 SPENDING
1	**CANADA (+15%)** Canadian visitors opened their wallets wider than ever in 2011, spending a record-breaking $24.0 billion on travel and tourism-related goods and services in the United States. As a result, our favorable balance of trade has never been better; the United States enjoys a $16.3 billion travel and tourism trade surplus with Canada. In fact, travel and tourism exports account for 43% of all US services exports to Canada.	**$24.0 BILLION**
2	**JAPAN (+2%)** Japanese visitor spending in the United States increased 2% in 2011, following an increase of nearly 11% in 2010. Despite these much-welcomed back-to-back years of growth, US travel and tourism exports to Japan are still off more than 17% from their peak in 1995 when Japanese visitors spent a record-breaking $17.8 billion. Travel and tourism exports account for 33% of all US services exports to Japan.	**$14.8 BILLION**
3	**UNITED KINGDOM (+6%)** U.K. visitor spending in the United States increased nearly 6% in 2011, following a small decline of 1% the previous year. Total US travel and tourism-related exports to the United Kingdom have declined more than 28% since 2008, the year in which U.K. visitor spending peaked at $16.7 billion. Travel and tourism exports account for 23% of all US services exports to the United Kingdom.	**$12.0 BILLION**
4	**MEXICO (+6%)** Visitors from Mexico spent $9.2 billion experiencing the United States in 2011, an increase of 6% when compared to 2010. Although 2011 marks the second consecutive year of growth in US travel and tourism-related exports to Mexico, this market has not fully recovered from the substantial downturn in 2009 (-17%). Travel and tourism exports account for 37% of all US services exports to Mexico.	**$9.2 BILLION**
5	**BRAZIL (+36%)** Talk about a growth market. 2011 marks the 8th consecutive year of double-digit growth in US travel and tourism exports to Brazil. Visitors from Brazil spent a record-breaking $8.5 billion on travel to, and tourism-related activities within, the United States in 2011, an increase of 36% that follows an increase of 36% in 2010. Travel and tourism exports account for 39% of all US services exports to Brazil.	**$8.5 BILLION**
6	**CHINA (+47%)** Visitors from China spent a record-breaking $7.7 billion in the United States last year, positioning China well ahead of Germany in rankings of top markets for the first time ever. Moreover, US travel and tourism exports to China have increased by at least 30% in seven of the last eight years! Travel and tourism exports account for 29% of all US services exports to China.	**$7.7 BILLION**
7	**GERMANY (+12%)** German visitor spending in the United States increased 12% in 2011, following an increase of 1% in 2010. The increase in spending was not, however, enough to maintain their position in the rankings, dropping from 6th to 7th in terms of total spending in the United States. Travel and tourism exports account for 25% of all US services exports to Germany.	**$6.3 BILLION**
8	**FRANCE (+18%)** US travel and tourism exports to France rose 18% in 2011 to a record-breaking $5.0 billion. Passenger fare exports have never been higher, either. In 2011 US carriers received a record-breaking $1.2 billion from travelers from France, an increase of more than 24% when compared to 2010. Travel and tourism exports account for 28% of all US services exports to France.	**$5.0 BILLION**
9	**AUSTRALIA (+22%)** Visitors from Australia spent a record-breaking $5.0 billion on US travel and tourism-related goods and services in 2011, propelling Australia up in the rankings ahead of India. This represents an increase of more than 22% when compared to 2010 and the second consecutive year exhibiting double-digit growth. Travel and tourism exports account for nearly a third (30%) of all US services exports to Australia.	**$5.0 BILLION**
10	**INDIA (+10%)** Visitors from India spent a record-breaking $4.4 billion in the United States in 2011, an increase of nearly 10% when compared to 2010. Annual US travel and tourism exports to India have risen by double-digits in seven of the last eight years. Travel and tourism exports account for 40% of all US services exports to India.	**$4.4 BILLION**

Source: OTTI 2011 Overseas Visitor Profile

The destinations visited by international travelers to the United States are still mainly the traditional ones. Brand USA has brokered extensive partnerships with these states and territories to leverage international consumer interest and maximize value to our partners, and is developing initiatives to promote US destinations that are beyond these gateways.

Overseas(1) Visitors To Select US Cities: 2010-2011

2011 Rank	Destination(2)(3) (City)	2010 Market Share	2010 Visitation (000)	2011 Market Share	2011 Visitation (000)	Volume Change (%)
1	New York City-WP-Wayne	32.1%	8,462	33.3%	9,285	10%
2	Los Angeles	12.7%	3,348	13.1%	3,653	9%
3	Miami	11.8%	3,111	10.6%	2,956	-5%
4	San Francisco	10.0%	2,636	10.3%	2,872	9%
5	Las Vegas	9.2%	2,425	10.0%	2,788	15%
5	Orlando	10.3%	2,715	10.0%	2,788	3%
7	Washington, DC	6.6%	1,740	6.5%	1,812	4%
8	Honolulu	6.2%	1,634	6.4%	1,785	9%
9	Boston	4.5%	1,186	4.7%	1,311	10%
10	Chicago	4.3%	1,134	4.3%	1,199	6%
11	San Diego	2.9%	765	2.7%	753	-2%
12	Philadelphia	2.4%	633	2.2%	613	-3%
13	Houston	1.7%	448	2.1%	586	31%
13	Atlanta	2.7%	712	2.1%	586	-18%
13	Flagstaff-Grand Canyon-Sedona	1.9%	501	2.1%	586	17%
16	Seattle	1.8%	475	1.7%	474	0%
17	Dallas-Plano-Irving	1.3%	343	1.5%	418	22%
18	San Jose	1.1%	290	1.3%	362	25%
18	Anaheim-Santa Ana	1.4%	369	1.3%	362	-2%
20	Buffalo-Niagara Falls	**	**	1.2%	335	n.a.
21	Denver	**	**	1.0%	279	n.a.
	Tampa/St. Petersburg	1.3%	343	**	**	n.a.

[1]Excludes Canada and Mexico.

[2]Only state visited having a sample size of 400 or more are displayed.

** = Estimate not shown due to sample size fewer than 400, the OTTI statistical policy

n.a. = Estimate not available.

Note: This table shows only one of the 35 travel characteristics data reported on international arrivals to the US

Additional information may be obtained for a fee. To learn more, please visit our website: http://tinet.ita.doc.gov/research/programs/ifs/index.html

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries, 2011 Overseas Visitor Profile

Release Date: May 2012

Overseas(1) Visitors To Select US States and Territories: 2010-2011

2011 Rank	Destination(2) (State/Territory)	2010 Market Share	2010 Visitation (000)	2011 Market Share	2011 Visitation (000)	Volume Change (%)
1	New York	32.8%	8,647	34.1%	9,508	10%
2	California	21.3%	5,615	22.0%	6,134	9%
3	Florida	22.1%	5,826	20.4%	5,688	-2%
4	Nevada	9.5%	2,504	10.3%	2,872	15%
5	Hawaiian Islands	8.1%	2,135	8.2%	2,286	7%
6	Massachusetts	4.9%	1,292	5.1%	1,422	10%
7	Texas	3.9%	1,028	4.6%	1,283	25%
8	Illinois	4.5%	1,186	4.5%	1,255	6%
9	Guam	5.0%	1,318	4.4%	1,227	-7%
10	New Jersey	3.7%	975	3.5%	976	0%
11	Pennsylvania	3.5%	923	3.3%	920	0%
12	Arizona	2.9%	765	3.1%	864	13%
13	Georgia	3.1%	817	2.4%	669	-18%
14	Washington	1.9%	501	1.8%	502	0%
14	Utah	1.8%	475	1.8%	502	6%
16	Colorado	1.3%	343	1.6%	446	30%
17	Virginia	1.4%	369	1.3%	362	-2%
18	North Carolina	1.3%	343	1.2%	335	-2%
18	Maryland	**	**	1.2%	335	n.a.
20	Connecticut	1.1%	290	1.1%	307	6%
21	Ohio	1.2%	316	1.0%	279	-12%

[1]Excludes Canada and Mexico.

[2]Only state visited having a sample size of 400 or more are displayed.

** = Estimate not shown due to sample size fewer than 400, the OTTI statistical policy

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Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries

Release Date: May 2012

Overseas Travelers Characteristics: 2011

Overseas Travelers Characteristics	All Overseas Visitors	All Leisure Visitors	All Business Visitors
Total Number of Travelers	**27,883,000**	**18,849,000**	**5,521,000**
Advance Trip Decision			
Average Number of Days	93.0	109.3	45.8
Median Number of Days	60.0	90.0	30.0
Advance Airline Reservation			
Average Number of Days	66.4	79.5	29.0
Median Number of Days	40.0	60.0	15.0
Means of Booking Air Trip			
Travel Agent	41.5%	42.4%	42.7%
Personal Computer/Internet	30.4%	32.5%	16.0%
Airlines Directly	12.7%	13.1%	9.1%
Company Travel Dept.	7.2%	2.4%	27.6%
Tour Operator	4.8%	6.3%	1.4%
Information Sources*			
Personal Computer	44.0%	49.8%	28.3%
Travel Agent	36.0%	37.7%	37.5%
Airlines	22.6%	22.2%	21.3%
Friends, Relatives	16.1%	18.2%	6.8%
Travel Guides/Timetables	8.1%	11.3%	2.5%
Tour Operator/Company	6.6%	8.5%	2.9%
Corporate Travel Dept.	6.4%	2.2%	25.3%
State/City Travel Office	3.2%	3.6%	2.3%
Newspapers/Magazines	2.7%	3.7%	0.8%
Use of Pre-Paid Package			
Yes	16.1%	21.9%	5.3%
No (Independent)	83.9%	78.1%	94.7%

*Multiple Response

Source: OTTI 2011 Overseas Visitor Profile

Overseas Travelers Characteristics: 2011

Overseas Travelers Characteristics	All Overseas Visitors	All Leisure Visitors	All Business Visitors
Total Number of Travelers	**27,883,000**	**18,849,000**	**5,521,000**
Number of States Visited*			
One State	66.9%	65.0%	64.6%
Two States	19.5%	19.4%	23.6%
Three or More States	13.7%	15.7%	11.8%
Average Number of States	1.6	1.6	1.5
Median Number of States	1.0	1.0	1.0
Number of Destinations Visited**			
Average Number of Destinations	2.0	2.2	1.8
Median Number of Destinations	1.0	1.0	1.0
Transportation in the US*			
Taxi	41.3%	41.6%	49.7%
Rented Auto	29.4%	32.3%	32.0%
City Subway/Bus	27.2%	31.9%	17.5%
Airline in the US	26.7%	25.6%	31.4%
Company or Private Auto	23.4%	20.4%	21.5%
Railroad between Cities	11.7%	11.7%	10.9%
Bus between Cities	10.8%	12.6%	5.5%
Air Arrivals Port-of-Entry			
New York	17.2%	19.3%	16.2%
Miami	13.8%	14.9%	12.1%
Los Angeles	11.1%	11.8%	12.1%
Newark	6.4%	6.3%	7.9%
Honolulu	6.1%	9.0%	0.9%
San Francisco	5.6%	4.8%	9.1%
Chicago	4.7%	3.0%	8.6%
Agana, Guam	3.8%	5.9%	0.1%
Atlanta	3.6%	2.2%	4.7%
Orlando	3.3%	4.0%	1.2%
Washington Dulles	3.3%	2.2%	4.4%
Houston	2.4%	1.6%	3.7%
Boston	1.9%	1.6%	2.6%
Dallas-Ft Worth	1.5%	1.0%	2.3%
Philadelphia	1.5%	1.1%	2.3%

*Multiple Response

**Maximum number is seven

Note: Only destinations with sample size of 400 or more are listed

Source: OTTI 2011 Overseas Visitor Profile

Overseas Travelers Characteristics: 2011

Overseas Travelers Characteristics	All Overseas Visitors	All Leisure Visitors	All Business Visitors
Total Number of Travelers	**27,883,000**	**18,849,000**	**5,521,000**
Leisure/Recreational Activities*			
Shopping	88.1%	91.5%	80.8%
Dining in Restaurants	83.5%	84.6%	84.5%
Sightseeing in Cities	44.4%	52.1%	28.9%
Visit Historical Places	41.3%	47.9%	26.7%
Amusement/Theme Parks	29.6%	35.6%	13.9%
Visit Small Towns/Villages	27.1%	30.8%	15.7%
Cultural/Heritage Sights	24.1%	28.6%	13.4%
Art Gallery, Museum	23.5%	26.5%	14.8%
Water Sports/Sunbathing	20.8%	26.3%	6.8%
Visit National Parks	20.3%	24.3%	11.9%
Touring the Countryside	19.2%	22.1%	11.1%
Guided Tours	17.8%	23.0%	7.3%
Concert, Play, Musical	16.6%	19.4%	10.4%
Nightclub/ Dancing	12.8%	13.2%	12.4%
Casinos/Gambling	10.5%	12.3%	7.1%
Cruises	7.5%	9.6%	3.5%
Attend Sports Events	7.1%	7.3%	5.3%
Ethnic Heritage Sights	4.4%	5.1%	2.6%
Golf/Tennis	4.4%	4.4%	3.7%
Camping, Hiking	4.2%	4.8%	2.9%
Visit American Indian Communities	3.5%	4.2%	1.9%
Environmental/Ecological Excur.	3.4%	3.9%	2.7%
Snow Skiing	1.8%	1.9%	1.6%
Hunting/Fishing	1.6%	1.7%	1.1%
Ranch Vacations	1.4%	1.5%	0.8%

*Multiple Response

**Maximum number is seven

Source: OTTI 2011 Overseas Visitor Profile

"We can't be everything to everybody, but we should be something to everybody."

– Chris Thompson
PRESIDENT AND CEO, BRAND USA

Objectives

- Drive positive awareness and perceptions of the United States as a travel destination in order to inspire and influence increased travel to and visitor spend in the United States
- Develop programs and initiatives that add and create value to attract industry participation and private-sector contributions to fund the work of Brand USA
- Build engagement, trust and advocacy for Brand USA through collaboration, strategic communications, and stakeholder relations
- Optimize, organize, and allocate Brand USA's resources to maximize operating efficiencies and build a high-talent, diverse, and results-driven team
- Complete the transition to a fully functioning cooperative destination marketing organization
- Collaborate with the Federal government on communication of visa and entry policy and implementation of the National Travel and Tourism Strategy
- Fulfill the mandates of and comply with the Travel Promotion Act

Goals

Brand USA will track and measure success based on improvements and increases related to: Awareness and Image of the USA as a travel destination, Intent to Travel and, most importantly, International Visitation and Spend.

1. Achieve campaign awareness levels of 15% in the 2012 campaign launch markets (Canada, Japan, and the United Kingdom) and 25% in the 2013 expansion markets (Australia, Brazil, Germany, Mexico, and South Korea)
2. Improve awareness and perceptions of the United States as a destination that is diverse, welcoming, surprising or adventurous by statistically relevant increases (+3 points or more) for these brand attributes
3. Increase intent to travel to the United States among campaign recognizers vs. non-recognizers (as measured by pre- and post-wave campaign research) by 5% in 2012 launch markets (Canada, Japan, and the UK) and by 10% in 2013 expansion markets (Australia, Brazil, Germany, Mexico, and South Korea)
4. Influence increases in arrivals to the United States from campaign countries to support the level forecast by the Office of Travel and Tourism Industries (OTTI) as of January 2013
5. Influence increases in desired length of stay among campaign recognizers vs. non-recognizers (as measured by pre- and post-wave campaign research) by statistically relevant increases (+3 points or more in 2013 expansion markets; maintain or grow in 2012 launch markets)
6. Generate a combination of cash and in-kind contributions from the private sector to total $100 million and thereby maximize the 1:1 match – targeting 50% from cash contributions and 50% from in-kind contributions
7. Continue to expand the USA's presence at international tradeshows as measured by year over year increases in US exhibitor participation (target 15% or higher per show per year)
8. Track progress against pre-determined metrics (to be established with the Federal agencies) to measure success of entry policy communication and other joint promotional efforts—leveraging a combination of KPIs currently tracked by the Federal agencies and Brand USA
9. Maintain directionally positive sentiment across social channels of 80% average or higher as measured on a quarterly basis
10. Increase active fan community by 15% on a year over year basis through targeted promotions, advertising and relevant content
11. Keep Brand USA overhead expenses to 15% or below
12. Develop and engage a diverse workforce at all levels of Brand USA

Strategies

Strategy		Supports these Goals
RELEVANCE	Increase relevance of Brand USA as the nation's DMO	1, 2, 3, 4, 5, 7, 8, 9
LEVERAGE/ ALIGNMENT	Leverage and align the industry's international marketing efforts	2, 3, 4, 5, 7, 8
ROI	Invest in programs and allocate resources on markets and initiatives that will maximize results	1, 2, 3, 4, 5, 8, 9
GROWTH	Attract partners and stakeholder participation/support to generate cash and in-kind contributions that will fund the work of the organization to fulfill its mandate	1, 2, 6, 7
COLLABORATE	Collaborate on the development of programs with government and industry stakeholders	1, 3, 4, 6, 8
CO-OP	Develop co-op opportunities that add, create, or amplify value to stakeholders	1, 2, 3, 4, 5, 6, 8
CONTENT	Develop unique content that inspires engagement and promotes travel to the United States and which can be repurposed by destinations and travel brands	1, 2, 3, 4, 5, 9, 10
DIGITAL	Enhance the content, functionality, and user experience on all digital platforms	1, 3, 4, 5, 8, 9, 10
EXCELLENCE	Build and organize a results-driven team and a culture that promotes inclusion and diversity, operates with integrity, and recognizes and rewards performance	1, 6, 11
AWARENESS/IMAGE	Increase awareness of Brand USA as both a high-value brand and premier travel destination	1, 2, 3, 4, 5, 6, 7, 8, 9

Department Tactics

Business Development		Supports these Strategies
BD1	Expand international representation to eight additional countries: • China and India in March • Australia and New Zealand (Oceania) in April • Brazil and Mexico in May • France and Canada in June	RELEVANCE LEVERAGE/ALIGNMENT ROI
BD2	Align and unify the industry's international marketing efforts through tradeshows, sales missions, workshops/seminars	LEVERAGE/ALIGNMENT
BD3	Host USA Pavilions and participate in 25 key international tradeshows in 18 countries, including: • Argentina • Brazil • China • Colombia • France • Germany • Italy • Japan • Mexico • India • Netherlands • Russia • Singapore • Spain • Sweden • Taiwan • UAE • United Kingdom	RELEVANCE LEVERAGE/ALIGNMENT ROI
BD4	Establish the USA's first USA pavilions in the Middle East, Latin America, and Russia	RELEVANCE LEVERAGE/ALIGNMENT ROI
BD5	Further enhance USA Pavilion presence at each show through continuity and quality in graphics, collateral, and pre-show exhibitor orientation/education **Lead:** Business Development as the lead **Shared Tactic With:** Advertising and Communications/Public Policy	AWARENESS/IMAGE
BD6	**Sales Missions:** Establish one sales mission per year for each market where Brand USA has international representation firms **Lead:** Business Development **Shared Tactic With:** Communications/Public Policy	RELEVANCE LEVERAGE/ALIGNMENT ROI
BD7	Coordinate activities with AviaReps Marketing Garden (AMG) Japan and JATA to implement the Tourism Exchange Year promotional initiatives. AMG to provide quarterly updates.	RELEVANCE LEVERAGE/ALIGNMENT
BD8	Launch MegaFam from the UK to the USA in May for 100 travel agents on 7 itineraries in conjunction with British Airways, American Airlines, >25 US destinations, and influential UK trade press **Lead:** Business Development **Shared Tactic With:** Advertising, Partnership Marketing, and Communications/Public Policy	LEVERAGE/ALIGNMENT ROI AWARENESS/IMAGE
BD9	**Fam Tours:** Conduct additional trade and media familiarization trips with countries where Brand USA has established international representation offices **Lead:** Business Development **Shared Tactic With:** Advertising, Partnership Marketing, and Communications/Public Policy	RELEVANCE LEVERAGE/ALIGNMENT ROI AWARENESS/IMAGE

Business Development		Supports these Strategies
BD10	Integrate and time the launch of consumer and trade outreach to maximize the opportunities that exist during peak travel planning periods **Shared Tactic With:** Marketing	LEVERAGE/ALIGNMENT ROI
BD11	Continue to expand tour operator advertising and co-op programs in countries where Brand USA has established international representation offices	RELEVANCE LEVERAGE/ALIGNMENT
BD12	Begin to track impact trade-focused activities and in-market outreach to the travel trade in India and China **Lead:** Business Development **Shared Tactic With:** Global Insights and Research	RELEVANCE
BD13	Launch social media training site for tour operators in the UK **Lead:** Business Development **Shared Tactic With:** Digital Marketing and Communications/ Public Policy	CONTENT DIGITAL
BD14	Develop, expand, and implement a range of partnership programs that provide relevant co-operative, publisher, research, customizable, and other opportunities for destinations and travel brands **Shared Tactic With:** Marketing	RELEVANCE ROI CO-OP

Business Development		Supports these Strategies
BD15	Maintain a comprehensive partnership guide detailing program opportunities—working in collaboration with our partners to continually develop and offer programs that help them maximize and achieve their business objectives **Shared Tactic With:** Marketing	RELEVANCE ROI CO-OP
BD16	Launch retail strategy to create partnership opportunities with targeted retail/shopping brands **Lead:** Business Development **Shared Tactic With:** Marketing	LEVERAGE/ALIGNMENT
BD17	Launch enhanced / targeted DMO outreach—via direct outreach and presentations at organization and industry conferences (focusing on core groups of regional co-ops, state tourism offices, and CVBs)	RELEVANCE
BD18	Explore and launch opportunities to engage consumers, travel trade, and partners through entertainment and sports branded content and events **Shared Tactic With:** Marketing	CONTENT
BD19	Create TV/video co-op opportunities with UK producers to develop digital content to promote US destinations in the UK **Lead:** Business Development **Shared Tactic With:** Marketing and Communications/Public Policy	CONTENT
BD20	Coordinate the promotion and distribution of the Brand USA Destination Guide via international representation firms and tradeshows **Lead:** Business Development as the lead **Shared Tactic With:** Marketing plus Communications/Public Policy to ensure collaboration/distribution at consulates/embassies and other federal agency channels	LEVERAGE/ALIGNMENT COLLABORATE
BD21	Develop and launch a partner satisfaction monitoring system **Lead:** Business Development **Shared Tactic With:** Global Insights and Research	RELEVANCE
BD22	Track states and territories supported through trade and consumer focused initiatives to ensure balanced representation in compliance with the Travel Promotion Act **Shared Tactic With:** Marketing and Communications/Public Policy	RELEVANCE
BD23	Develop and launch consumer CRM platform to support business development, partnership programs and stakeholder relations, including targeted email communications and consumer profile development for targeting and partner re-marketing use **Lead:** Operations **Shared Tactic With:** Business Owners (Business Development, Digital Marketing, and Communications/Public Policy)	GROWTH
BD24	Integrate the Business Development Advisory Group into global regionally focused marketing advisory groups	COLLABORATE

Advertising		Supports these Strategies
AD1	Re-launch the consumer campaign in the Canada, Japan, and the UK with traditional media (TV, Out-of-Home), digital and social media.	ROI GROWTH COLLABORATE CO-OP
AD2	Launch the consumer campaign into additional markets that have the greatest potential to deliver incremental visitor volume (# of visitors), value (visitor spend), growth (yoy growth in visitation + spend), cost (media efficiency), and ease of entry (visa or visa waiver country, wait times, etc.): • Australia • Brazil • China • Germany • Mexico • South Korea	ROI GROWTH COLLABORATE CO-OP
AD3	Integrate and coordinate the launch of consumer and trade efforts with partners to maximize the opportunities that exist during peak travel planning periods (shared tactic with business development). Execute campaign and co-op media buys to be in market as follows: **BY TIMELINE** **February-March 2013** • Canada • United Kingdom **March-April 2013** • Japan **May-June 2013** • Mexico **June-July 2013** • Canada **June-August 2013** • Brazil • South Korea **July-August 2013** • United Kingdom • Germany **August-September 2013** • Australia **FY2013** • China **Q2 FY2014** • India • France **BY MARKET** **Japan (2 waves)** • February-March 2013 • September-October 2013 **Canada (2 waves)** • February-March 2013 • June-July 2013 **United Kingdom (2 waves)** • February-March 2013 • July-August 2013 **Mexico (1 wave)** • May-June 2013 **Brazil (1 wave)** • June-August 2013 **South Korea (1 wave)** • June-August 2013 **Germany (1 wave)** • July-August 2013 **Australia (1 wave)** • August-September 2013 **China** • FY2013 **India** • Q2 FY2014 **France** • Q2 FY2014 Note: Timing of media flights subject to change in order to optimize the campaign	ROI GROWTH COLLABORATE CO-OP DIGITAL/SOCIAL

Advertising		Supports these Strategies
AD4	Re-develop digital advertising and media strategy and creative tactics	ROI GROWTH COLLABORATE CO-OP DIGITAL
AD5	Develop a searchable database of in-kind content / visual assets that can be easily accessed by stakeholders and the media	RELEVANCE CONTENT
AD6	Develop and acquire creative assets that can be used to support consumer and trade efforts throughout the year **Lead:** Marketing **Shared Tactic With:** Business Development	RELEVANCE LEVERAGE/ALIGNMENT ROI CONTENT CO-OP COLLABORATE

Digital		Supports these Strategies
DM1	Provide an enhanced digital experience for consumers while creating opportunities for partner engagement and investment	DIGITAL/SOCIAL GROWTH COLLABORATE CO-OP CONTENT
DM2	Re-develop and upgrade the DA.com experience to provide better user experience, flexibility for partner participation / coop as well as enhance the ability to manage and grow the site presence—with enhancements that include providing display opportunities to link to partner content deeper in the site, enable content and placement opportunities, and deliver country-targeted content specific to the market	DIGITAL/SOCIAL GROWTH COLLABORATE CO-OP CONTENT
DM3	Build out a mobile digital experience targeting the right content users to enable a positive mobile experience from all mainstream mobile and tablet devices	DIGITAL/SOCIAL GROWTH COLLABORATE CO-OP CONTENT
DM4	Establish a dashboard and measurement processes for Brand USA digital properties segmented by stakeholder (reporting to board, DMO stakeholders, partners and for internal use)	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM5	Test and implement cooperative digital media opportunities leveraging video content and partner content in new digital formats including interactive display and on-live video	DIGITAL/SOCIAL GROWTH COLLABORATE CO-OP CONTENT

Digital		Supports these Strategies
DM6	Create and launch a user-generated contest to gain additional native content and provide more relevant, first-person content for our webs and social channels	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM7	Investigate, plan and deliver roadmap for launch in additional markets. Plan out key social media, content and digital experience needs by market	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM8	Localize digital experiences by market in order to deliver market specific content, messaging and promotions across digital and social tools	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM9	Build out cooperative and participation opportunities for partners that enable country-targeted campaigns and content delivery to consumers based on the target market priorities of partners	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM10	Build out full YouTube channel experience to deliver owned and partner content that is relevant to each visitors lifestyle, USA destination preference and language.	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM11	Develop and launch consumer CRM platform to support business development, partnership programs and stakeholder relations, including targeted email communications and consumer profile development for targeting and partner re-marketing use **Lead:** Operations **Shared Tactic** Across All Departments	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM12	Launch partner re-targeting capabilities allowing travel operator partners and DMOs to communicate to consumers after visit to Brand USA properties (i.e. banner retargeting, email coop / offers)	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT
DM13	Establish a platform roadmap and partner process to provide right consumer tools in our digital channels that engage consumers and allow partners to reach them during their trip to the USA	DIGITAL/SOCIAL RELEVANCE GROWTH COLLABORATE CO-OP CONTENT

Social Media		Supports these Strategies
SM1	Establish process and launch quarterly promotions in each target country in cooperation with local social resources and representation—with a focus on leveraging open cooperative participation opportunities to partners within the promotions targeted to each country	CO-OP
SM2	Develop and launch Facebook and Twitter advertising assets to test messaging, drive consumer engagement and support key promotional campaigns in each target market	DIGITAL/SOCIAL
SM3	Select social media listening platform to amend or replace current through JWT – Sysomos **Shared Tactic With:** Global Insights and Communications/Public Policy	AWARENESS/IMAGE
SM4	Test a campaign and presence with WAYN.com (global social travel community of estimated 19 million members) with the participation of interested DMO partners to build out USA destination presence	COLLABORATE
SM5	Capitalize on native content videos (Miles program) for YouTube in-stream ads and interactive digital display to deliver traffic to our brand YouTube channel while delivering video views to our partners	CONTENT
SM6	Continue to test content formats, tools and messaging as new features are added to core social channels.	DIGITAL/SOCIAL

Partner Marketing		Supports these Strategies
PM1	Develop, enhance, and maintain a range of partnership programs that provide relevant co-operative, publisher, research, customiz-able, and other opportunities for destinations and travel brands **Shared Tactic With:** Business Development	ROI GROWTH
PM2	Explore and launch opportunities to engage consumers, travel trade, and partners through entertainment and sports branded content and events **Shared Tactic With:** Business Development	CONTENT
PM3	Explore opportunities to launch an experiential entertainment event to inspire and drive travel to the United States **Lead:** Marketing **Shared Tactic With:** Business Development	CONTENT
PM4	Execute sponsorship of World Baseball Classic to expand consumer outreach / engagement and inspire incremental visitation to the USA and engage with key stakeholders **Lead:** Marketing **Shared Tactic With:** Business Development and Communications/ Public Policy	IMAGE/AWARENESS

Partner Marketing		Supports these Strategies
PM5	Execute ESPN media sponsorship to inspire experiential sports/recreation travel to the USA **Shared Tactic With:** Business Development, Marketing, and Communications/Public Policy	IMAGE/AWARENESS
PM6	Track states and territories supported through trade and consumer focused initiatives to ensure balanced representation in compliance with the Travel Promotion Act **Shared Tactic With:** Marketing and Communications/Public Policy	RELEVANCE
PM7	Leverage, track and report on the use of content / visual assets contributed as in-kind	CO-OP
PM8	Enhance the work and alignment of the Marketing Advisory Group with the organization's strategies	COLLABORATE

Global Insights & Research		Supports these Strategies
GR1	Hire a Director, Global Insights and Research	EXCELLENCE
GR2	Track and report performance metrics and other relevant data to benchmark campaign impact and optimize campaign effectiveness	ROI
GR3	Collect data to do a volumetric analysis and map key lagging indicators of Brand USA efforts in FY2013 launch (Australia, Brazil, Germany, Mexico, and South Korea) and FY2014 launch markets (China and India) to include intent to visit, spend, % of jobs attributed to travel/hospitality	ROI
GR4	Develop a dashboard and reporting process that provides measures of progress across all programs and channels	ROI
GR5	Develop a dashboard augmented with a series of program-specific reporting process that establishes measures of progress, helps identify and act upon areas of improvement, and enables the organization to share frequent updates with stakeholders in the following areas: • Campaign impact (awareness, image, intent) • Digital assets (social and web) • Co-op Programs • Ease of Travel	ROI
GR6	Launch ongoing social media listening reporting to monitor topics of crisis communications, brand feedback, sentiment as well as business development opportunities **Shared Tactic With:** Communications/Public Policy—with Global Insights and Research lead on monitoring and establishing the report document and Communications/Public Policy the lead on communications to stakeholders	IMAGE/AWARENESS
GR7	Develop and launch a partner satisfaction monitoring system **Shared Tactic With:** Business Development	GROWTH

Media/PR		Supports these Strategies
PR1	Increase awareness and build ongoing support for Brand USA through positive media coverage—across consumer, trade, and business news channels (domestic and international) by establishing: • Agency infrastructure/support • Compelling message points and elevator speech • Editorial calendar for media outreach • Media cultivation strategy • Coordination of efforts with international representation firms and US diplomatic presence • Tracking, valuation, and reporting process for earned media • Enhanced media materials and platforms • Media training program for Brand USA spokespeople	RELEVANCE AWARENESS IMAGE COLLABORATE
PR2	Develop a strategy for generating content-driven PR/Media Partnerships (international)	CONTENT CO-OP DIGITAL
PR3	Integrate social media PR / media outreach with the Brand / digital plan and editorial calendars	CONTENT DIGITAL COLLABORATE
PR4	Develop and launch National Media Site and Distribution to add and create value for destinations	COLLABORATE RELEVANCE AWARENESS/IMAGE
PR5	Develop national/industry wide event calendar (two-tier: industry and consumer) to maximize reach for destinations, inspire travel to the United States and facilitate travel planning	COLLABORATE AWARENESS/IMAGE RELEVANCE
PR6	Establish and coordinate visiting journalist programs in markets where Brand USA has international representation firms established	CONTENT AWARENESS/IMAGE GROWTH
PR7	Establish online Media Room (b-roll, VNRs, digital assets) and related online Partner Resource Room (b-roll, VNRs, digital assets, messaging) for media materials	RELEVANCE AWARENESS/IMAGE CONTENT
PR8	Create a series of toolkits to update on an ongoing basis and launch in advance of key events and initiatives to support partners	RELEVANCE AWARENESS/IMAGE CONTENT
PR9	Develop a presentation builder for Brand USA speakers to access and use to efficiently create and update presentations for industry events and B2B outreach	EXCELLENCE AWARENESS/IMAGE GROWTH

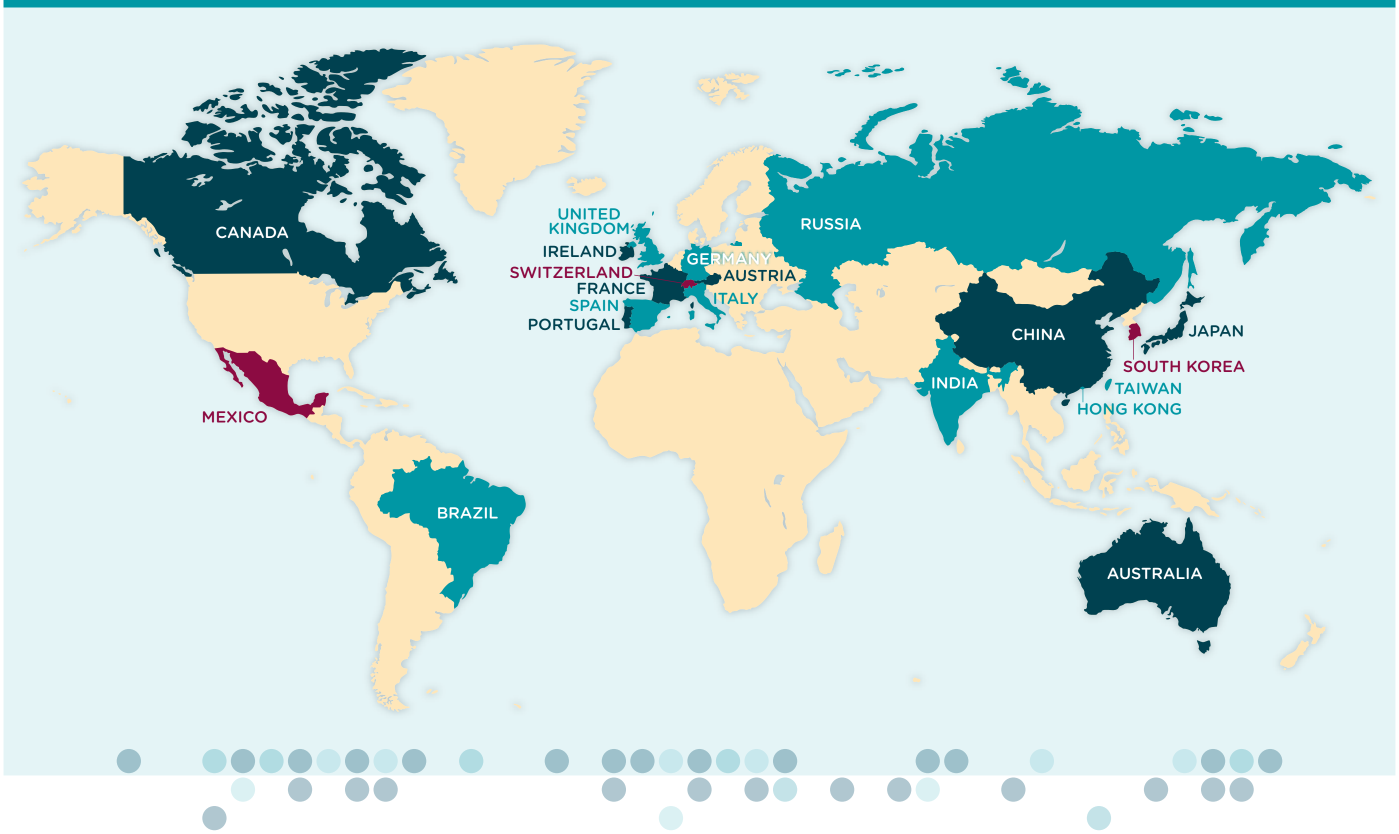
Media/PR		Supports these Strategies
PR10	Build engagement, trust, and advocacy for Brand USA through stakeholder communications / CRM / eNewsletter series to include an umbrella newsletter augmented with communications customized for Industry, Partners, stakeholders, media, and supplier partners	RELEVANCE AWARENESS/IMAGE CONTENT
PR11	Establish a communications advisory group to engage the industry and partners and maximize our collective efforts to increase awareness of the USA as a premier travel destination	EXCELLENCE RELEVANCE
PR12	Develop a partnership cultivation/communications strategy and related materials to support business development	EXCELLENCE; GROWTH
PR13	Build a proprietary/password protected website to enable the organization to communicate immediately and effectively with stakeholders	CONTENT
PR14	Launch an interim bridge to the BrandUSA.com website to facilitate immediate near-term goals for stakeholder and media communications	DIGITAL
PR15	Develop a report to provide ongoing updates to stakeholders	RELEVANCE AWARENESS/IMAGE
PR16	Produce the organization's Annual Report for Department of Commerce transmittal to Congress by May 15 as required by the Travel Promotion Act	AWARENESS/IMAGE
PR17	Enhance the quality of content and presentations for the organization's board meetings in order to provide information most relevant to stakeholders and the public	EXCELLENCE
PR18	Develop a speakers bureau and conference strategy to maximize Brand USA's presence at influential shows	EXCELLENCE AWARENESS/IMAGE
PR19	Build out the organization's stationery and specialties program to maximize efficiencies and value; explore establishing an online fulfillment capability with inventoried items expensed only at time of fulfillment	EXCELLENCE
PR20	Develop and execute the strategy for ensuring a compelling presence at IPW in ways that effectively represent the United States	AWARENESS/IMAGE RELEVANCE

Communications & Public Policy		Supports these Strategies
CP1	Meet with the Tourism Policy Council and the Working Groups on Marketing and Promotions, Ease of Travel, and Research monthly at the staff level; quarterly at the VP/CEO level; and biannually at the CEO-Secretary level to ensure a coordinated national approach to travel promotion	COLLABORATE AWARENESS/IMAGE CONTENT RELEVANCE
CP2	Collaborate with the Tourism Policy Council Ease of Travel Working Group to communicate visa, entry, and other policy information provided by the TPC through multiple channels, including DiscoverAmerica.com, social media, the USA Visitors Guide, in-market representation and communications, and other trade and consumer events	COLLABORATE RELEVANCE CONTENT
CP3	Collaborate with the Department of Homeland Security to promote and expand trusted traveler programs, such as Global Entry and TSA Pre✔™ and explore collaboration on arrival halls improvement project to establish a more welcoming environment	COLLABORATE CONTENT
CP4	Work with the Department of Homeland Security/Customs and Border Protection and airport authorities to understand and improve the customer experience at our ports of entry	COLLABORATE
CP5	Collaborate with the Tourism Policy Council Marketing and Promotions Working Group to develop and conduct joint activities and leverage Federal assets for Brand USA's campaign	COLLABORATE CONTENT AWARENESS/IMAGE
CP6	Collaborate with the US missions abroad to develop new collateral and enhance existing communications materials that can be distributed and displayed at embassies, consulates, key information centers, digital properties, meetings, and high-profile events Arm in-market reps with resources to support to support their collaboration with embassies on the above programs in collaboration with Business Development	COLLABORATE CONTENT CO-OP
CP7	Collaborate with the State Department and the Foreign Commercial Service on in-market communications, social media, and embassy events	COLLABORATE CONTENT
CP8	Determine with the Tourism Policy Council, and particularly the Research Working Group, the key metrics to track to determine success of entry policy communication and other joint promotional efforts—using a combination of KPIs currently used by the Federal Agencies and Brand USA (shared tactic with global insights and research)	COLLABORATE RELEVANCE EXCELLENCE
CP9	Meet monthly with Public Affairs Working Group, catalogue key legislative assets, and execute legislative cultivation strategy	AWARENESS/IMAGE COLLABORATE

Communications & Public Policy		Supports these Strategies
CP10	Meet regularly with key legislative investors at staff-to-staff and CEO/board-to-member level according to cultivation strategy (T&T Caucuses, committees of jurisdiction, authorizers, other key voices)	AWARENESS/IMAGE
CP11	Design new materials to highlight state-by-state impact of international travel and Brand USA impact on and engagement with business(es) in the state	RELEVANCE AWARENESS/IMAGE CONTENT
CP12	Develop campaign reporting process for public and stakeholder communications (success metrics combining media measures, digital performance and transactions where available (shared tactic with Communications/Public Policy—with Global Insights and Research lead on monitoring and establishing the report document and Communications/Public Policy the lead on communications to stakeholders) Establish a regular schedule of reporting to provide frequent and relevant updates on campaign progress and other initiatives to Federal government and industry stakeholders	AWARENESS/IMAGE CONTENT RELEVANCE
CP13	Develop and launch consumer CRM platform to support business development, partnership programs and stakeholder relations, including targeted email communications and consumer profile development for targeting and partner re-marketing use (shared tactic across all departments with the effort led by Operations to support the cross-department business owners)	EXCELLENCE
CP14	Launch ongoing social media listening reporting to monitor key issues, brand feedback, sentiment as well as business development opportunities (shared tactic with Communications/Public Policy—with Global Insights and Research lead on monitoring and establishing the report document and Communications/Public Policy the lead on communications to stakeholders)	AWARENESS/IMAGE
CP15	Support all states and territories through an appropriate mix of trade and consumer focused initiatives **Shared Tactic With:** Marketing	CONTENT RELEVANCE

Operations		Supports these Strategies
OP1	Implement accounting and financial reporting system	EXCELLENCE
OP2	Track and report on the organization's progress to maintain over-head expenses at 15% or below	ROI
OP3	Meet all financial reporting requirements as mandated by the Travel Promotion Act, DC Law, and accounting principles	EXCELLENCE
OP4	Commence FY2013 internal audit	EXCELLENCE
OP5	Conduct a comprehensive policy and procedure review—focusing first on in-kind contributions, revenue recognition, and donor-imposed restricts	EXCELLENCE
OP6	Implement and update policies and procedures related to financial controls and ensure they are applied to monthly reconciliations	EXCELLENCE
OP7	Lead the process, working with a cross-section of departments (business development, partnership marketing, communications and public policy) to update and implement in-kind policies and procedures in coordination with the Department of Commerce	COLLABORATE
OP8	Develop an effective inclusion and diversity strategy to build a world-class team and culture	EXCELLENCE
OP9	Establish partnership and vendor monitoring and tracking to ensure Brand USA utilizes a diverse range of vendors and suppliers, including minority-, woman-owned and small businesses	EXCELLENCE
OP10	Develop and launch consumer CRM platform to support business development, partnership programs and stakeholder relations, including targeted email communications and consumer profile development for targeting and partner re-marketing use (shared tactic across all departments with the effort led by Operations to support the cross-department business owners)	GROWTH
OP11	Conduct and execute against a comprehensive staffing and compensation review for the organization to ensure alignment with organizational mission and to maximize productivity and impact	EXCELLENCE
OP12	Execute phase 2 IT leadership and platform enhancements and optimization to meet short-term goals and prepare the organization for its long-term needs	EXCELLENCE
OP13	Continue central location processing to review, verify, and validate private contributions to drawdown Federal matching funds (shared tactic with Business Development and Communications/ Public Policy)	ROI
OP14	Ensure transparency and compliance with FY2013 GAO audit (shared tactic with Communications/Public Policy)	EXCELLENCE

BRAND USA IS ACTIVELY WORKING WITH THE TRAVEL INDUSTRY IN THE FOLLOWING MARKETS



Marketing

- Launched fully integrated consumer campaign comprised of television, print, out of home and digital/search/social media marketing in Canada, Japan, and the United Kingdom (May through July 2012)
  - Achieved above average campaign awareness in launch markets (averaging 25%)
  - Drove noteworthy positive shifts in perceptions of the United States as a travel destination
  - Significantly increased intent to visit in launch markets [1]
    - Canada up 12%
    - Japan up 14%
    - United Kingdom up 14%
- Launched DiscoverAmerica.com
- Established international social media strategy with strong engagement and positive sentiment, supported by country-specific social media pages in Brazil, Canada, Germany, Japan, and the United Kingdom
- Developed a variety of value-driven partnership marketing programs ranging from Publisher Programs to Joint Media Planning & Buying to various Co-Op Opportunities
- Established inaugural sports and entertainment marketing programs for launch in 2013, including relationships with World Baseball Classic and ESPN sponsorship, including broadcast and digital media, and custom content
- Renegotiated master services agreement with advertising agency of record at more favorable terms
- Established direct relationships with media planning & buying, digital and various other support agencies

[1] Source: Hall & Partners: Brand USA Wave Tracking Research 2012 Summary Report

Business Development

- Optimized staffing for start-up year
- Established relationships with more than 260 travel brands and destinations representing all industry sectors
- Doubled the number of Founding partners to a total of 20 organizations that delivered more than $52 million in cash and in-kind contributions to Brand USA to date
- Created partnership activity with 88% of targeted travel industry brands, DMOs and CVBs for FY2012
- Generated more than $60 million in private contributions with approximately 48% in cash and 52% in kind, maximizing the 2:1 match year as evidenced by the anticipated release of $100 million in matching funds
- Published a comprehensive menu of Brand USA partnership opportunities
- Significantly expanded and re-invigorated the United States' participation at key international tradeshows by creating strong umbrella branding and expanding the USA Pavilion footprint and quality of the USA's exhibitor presence—providing value-add opportunities for destinations and travel brands not previously able to participate
- Hosted USA Pavilions at international tradeshows in 12 countries (Argentina, Brazil, China, France, Italy, India, Japan, Mexico, Singapore, Spain, Sweden, and the United Kingdom)
- Established international representation and opened offices in eight countries that generate approximately 75% of international in-bound travel to the United States
- Initiated travel trade outreach to tour operators in 19 international markets (including Australia, Austria, Brazil, Canada, China, France, Germany, India, Ireland, Italy, Japan, Mexico, Portugal, Russia, South Korea, Spain, Switzerland, Taiwan, and the United Kingdom
- Launched the Tourism Exchange Year with JATA in Japan and completed industry sales mission in India

BRAND USA HAS ESTABLISHED REPRESENTATION IN THE FOLLOWING INTERNATIONAL MARKETS

- Achieved prominent partnership development and educational presence at key national industry conferences in the United States, including Destination Marketing Association International's (DMAI) annual conference, US Travel Association's Educational Seminar for Tourism Organizations (ESTO) and International Pow Wow (IPW), and the Travel and Tourism Research Association's Global Tourism Outlook Forum

Communications and Public Policy

- Established a coordinated framework through the Tourism Policy Council to collaborate with the National Travel and Tourism Strategy and develop coordinated communication of US visa and entry policy and responses to inquiries
- Coordinated with the Departments of Homeland Security and State on proper travel policy language for DiscoverAmerica.com
- Leveraged State Department and US Commercial Service channels to display Brand USA video and collateral at embassies, consulates, public events, and high-level meetings
- Completed digital campaign entitled "50 States in 50 Days" (June to July 2012) to direct traffic to Brand USA's consumer website, DiscoverAmerica.com, from all web properties managed by the Department of State (which draw more than 10 million viewers of digital properties daily)
- Increased the frequency and quality of content for stakeholder communications
- Made several appearances / speeches at high profile industry conferences and forums, including more than 30 state and national tourism conferences
- Established Public Affairs Working Group comprised of key industry and association stakeholders in order to remain up to date on public policy issues
- Held dozens of informational update meetings with key legislative stakeholders
- Established scorecard to better evaluate Brand USA's participation at industry events
- Streamlined and clarified the process for valuing and submitting private contributions for the drawdown of Federal matching funds
- Initiated a system and central location with Commerce to boost processing of end-of-year submissions for Federal matching funds
- Garnered expansive and positive media coverage across all markets (trade, consumer, and business press) in key national, regional, and local news outlets

Operations

Leadership and Workforce

- Hired Christopher L. Thompson as Brand USA's president and CEO, who brings extensive travel/destination experience to the organization, including:
  - Outstanding track record driving travel and tourism growth (international visitation to Florida increased to record numbers under his leadership)
  - Success in developing and building programs that deliver a strong return on investment
  - Proven ability to build a world-class team and trust-based productive relationships with industry and government
  - More than a decade of unqualified audits
- Hired Mary Ellen Curto as Brand USA's vice president of operations, an established executive with public and private enterprise experience and track record for establishing and leading disciplined financial, HR, and IT organizations.
- Completed comprehensive review of staff and alignment to organizational mission
- Optimized staffing (salary/hourly, employee/contractor)
- Implemented 401k plan
- Completed salary survey and made initial adjustments to align competitively
- Initiated comprehensive compensation review to establish competitive salary ranges

Finance and Accounting/ Compliance and Controls

- Strengthened policies related to Contracts and Procurement, Travel and Expenses, Corporate Credit Card, and Cell Phones
- Following an extensive RFP process, established BDO as Brand USA's financial services, auditing and accounting firm
  - Brings deep expertise in specialty tax and financial areas
  - Strengthens monitoring controls, which helps increase transparency, reduce costs, strengthen compliance and enable management to make more informed business decisions
  - Builds upon the third-party monitoring provided by Moss Adams to review all invoices against contracts, expense reports and other financials to ensure compliance with auditing standards, policies, and contract terms

Information Technology

- Installed server and upgraded network security, anti-virus software, WiFi access and email server
- Replaced IT contractor—saving several thousand dollars per month and significantly improving IT infrastructure

Recent Awards and Accolades

- Chris Thompson named one of the top 25 Extraordinary Minds in Marketing by the Hospitality Sales & Marketing Association International (HSMAI) in January 2013
- Brand USA honored in January 2013 with a Gold Adrian Award by the Hospitality Sales & Marketing Association International (HSMAI) for its Out of Home/Transit consumer marketing campaign elements
- Brand USA honored in January 2013 with a Silver Adrian Award by the Hospitality Sales & Marketing Association International (HSMAI) for its consumer marketing campaign
- The Norwegian travel votes the United States as their favorite in the category "Best Tourism Destination." The US Ambassador to Norway, Barry B. White, accepts the honor at the annual Grant Travel Awards Gala in January 2013 and acknowledges the work of Brand USA, the Travel Promotion Act, and President Obama's commitment to the National Travel and Tourism Strategy.
- The marketing efforts for Brand USA are cited in January 2013 as best out of 193 countries by Bloom Consulting, a Madrid based Strategy consulting firm, specialized in Country branding and Business Strategy, founded in 2003 by José Filipe Torres. According to Bloom, the ranking reflects a strong tourism branding strategy, boosted by Brand USA's marketing efforts. The Bloom Consulting Country Brand Ranking © is the only country or nation brand ranking which classifies countries by the effectiveness of their country brand strategies and its subsequent impact on the country's GDP.


Bloom Consulting

Bloom Consulting Country Brand Ranking ©

Tourism Edition 2012

Bloom Consulting Country Brand Ranking ©
2012 TOURISM EDITION - WORLD Ranking

Rank		CBS Rating ©
1.	United States of America	AA
2.	Spain	AAA
3.	France	AA
4.	China	A
5.	Turkey	AAA
6.	Thailand	AAA
7.	Germany	BBB
8.	Macao	AAA
9.	United Kingdom	BBB
10.	Australia	BBB

Marketing & Positioning

USA

Three simple letters jam-packed with perceptions… and misperceptions.

There was a time when Times Square and The Grand Canyon were enticing enough to attract tourists worldwide. But 9/11-era airline security, unpopular foreign policy, and increasing interest in "newer" destinations has led to the first-ever decline in US tourism.

This is the story of a country that was once the world's darling, but whose reputation had become tarnished among foreign tourists over the past decade — costing America thousands of jobs annually, and billions in tourism spend.

In the Fall of 2011, we were tasked with turning this around. We would create America's first tourism brand from scratch — across multiple languages and touch points, to an audience as large as the world…all in less than eight months.

But, how does one sell to the world?

We will show how planning uncovered the insights needed to craft a creative strategy that would welcome international tourists back to ourshores, help them see the US through fresh eyes, and remind the world why it fell in love with America in the first place.

This is the story of how we helped the world rediscover this land, like never before, and how we are building on the campaign's success.

The Situation

America — no longer the world's darling

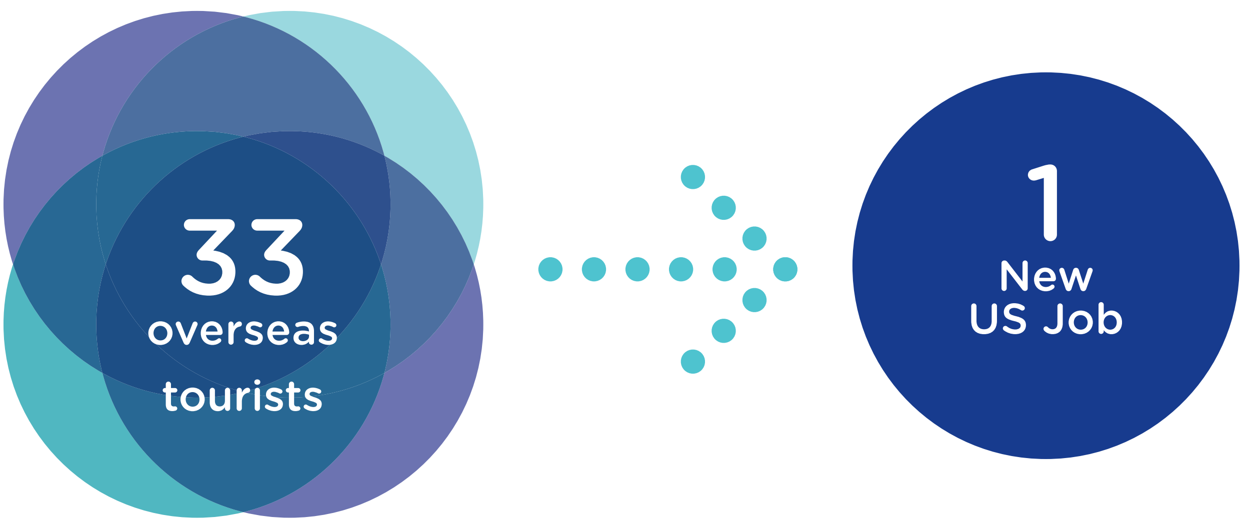
There was a time when the USA was considered the world's beacon, a place that held a dream for all. But complicated entry procedures, unpopular politics, and the emergence of newer, hipper travel destinations conspired to lure tourists elsewhere. **Our share of the booming global tourism market had declined 37% over the last decade**, resulting in 467,000 lost jobs annually and $606 billion in lost revenue.

America had become "middle-aged," neither as attractive as the timeless, historical destinations of Europe, nor as alluring as the newcomers of the East.

As the only industrialized nation on earth without a National Tourism Ministry, the USA needed to wake up to this reality. We weren't just out of touch, we were being left behind.

A chance to reverse the decline

In 2009, President Obama officially recognized tourism as an opportunity to jump-start the economy and create badly needed jobs. **Every 33 new overseas tourists would create 1 new domestic job.**



The "Travel Promotion Act" was passed, and Brand USA was born. And then it was time to get to work.

The Challenge

How do you sell a place as big as America?

America is a complex place — a melting pot of people, places, and cultures that is almost defined by the near impossible task of defining it. From the Bayou to the Rockies, from Hollywood Hills to the fishing towns of Maine, we'd need to sell it all.

In addition, our message would need to resonate not just with travelers globally, but also inspire the travel trade, and pass muster with key stakeholders on Capitol Hill.

Get it right, and we'd remind people the world over what they love most about America. Get it wrong, and the criticism would be deafening...

So we set out to develop a globally relevant tourism brand, complete with:

- a new graphic identity
- fully-integrated consumer and trade advertising campaigns
- a content-rich website in multiple languages
- and a lively, interactive social media presence

But first we needed to understand the barriers to visit

The first thing we did was listen. We needed to understand the obstacles that might prevent travelers from planning a trip to the USA.

Through several roundtable sessions with planners from our international network, and a quantitative research study among 3,000 travelers in 11 markets, we surfaced the primary reasons people cited for considering other travel options **over** America:

AMERICA IS UNWELCOMING

"Everywhere else in the world we feel welcome, but not in the US." — Brazil

"In other countries it's called immigration... in America it's called Homeland Security... bear in mind the semiotics of that." — UK

AMERICA IS TOO FAMILIAR

"The USA is not so exotic anymore because we have adopted a lot of American stuff" — Germany

"You've seen it all in the movies, easy access through the Internet." — Mexico

AMERICA IS BRASH AND ARROGANT

"Chinese still feel that America is the leader and sets the global standards, but they also see America as arrogant, not generous, petty, confrontational, and getting in fights with everyone." — China

"On TripAdvisor, Americans are rated as the loudest and most obnoxious tourists of all." — Canada

THERE ARE NEWER, COOLER PLACES

"If you want new, different and undiscovered, you go to Southeast Asia." — UK

"Other destinations are now more top of mind, like Dubai, China, Taiwan." — Japan

AMERICA IS NOW MIDDLE-AGED

"Europe has been the old world, America the new, but not anymore — now America is middle-aged." — Spain

"It's the shabby new world." — UK

We clearly had our work cut out for us. We now knew that in order to reignite interest in America, our communications would need to show that:

- there's more to America than meets the eye
- we really are welcoming to all
- there are fresh and unexpected discoveries awaiting

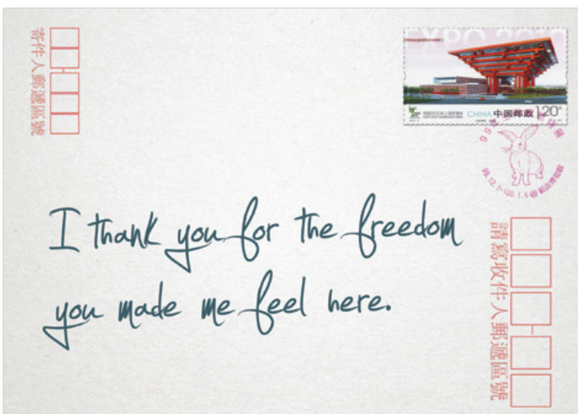
Finding the sparks to reignite the flame

Simultaneously, we set out to uncover travelers' motives to visit. So we developed an innovative research technique designed to tap their deepest feelings about this country. We asked them to write America a postcard, telling her about their experiences here, real or projected.

Through this exercise, travelers the world over bared their souls. The profound description and genuine emotion they expressed made us realize there is something deeply unique about this country that cannot be experienced elsewhere.

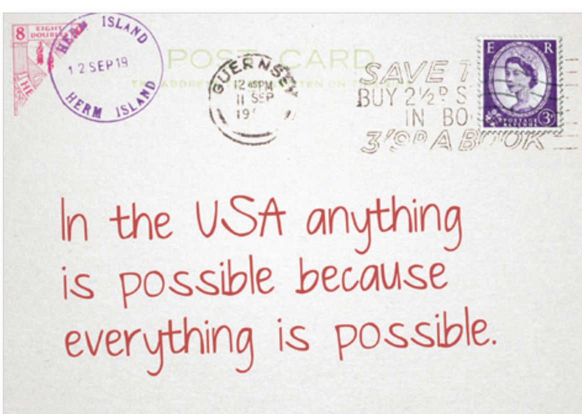
Their sentiments fell into four central themes:

Freedom

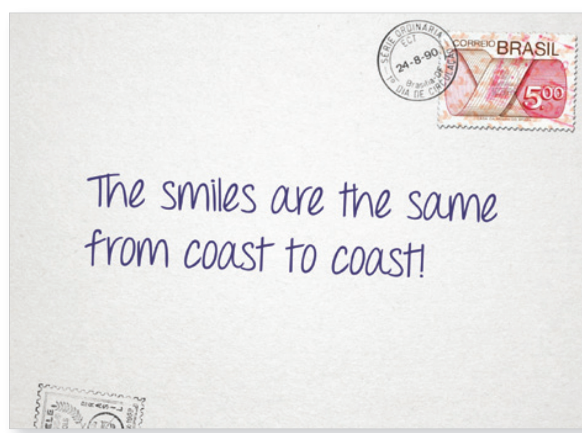


Diversity of People & Experiences

Boundless Possibilities



Welcoming to All



The “Aha” Moment

America is more than a destination, it’s an IDEA

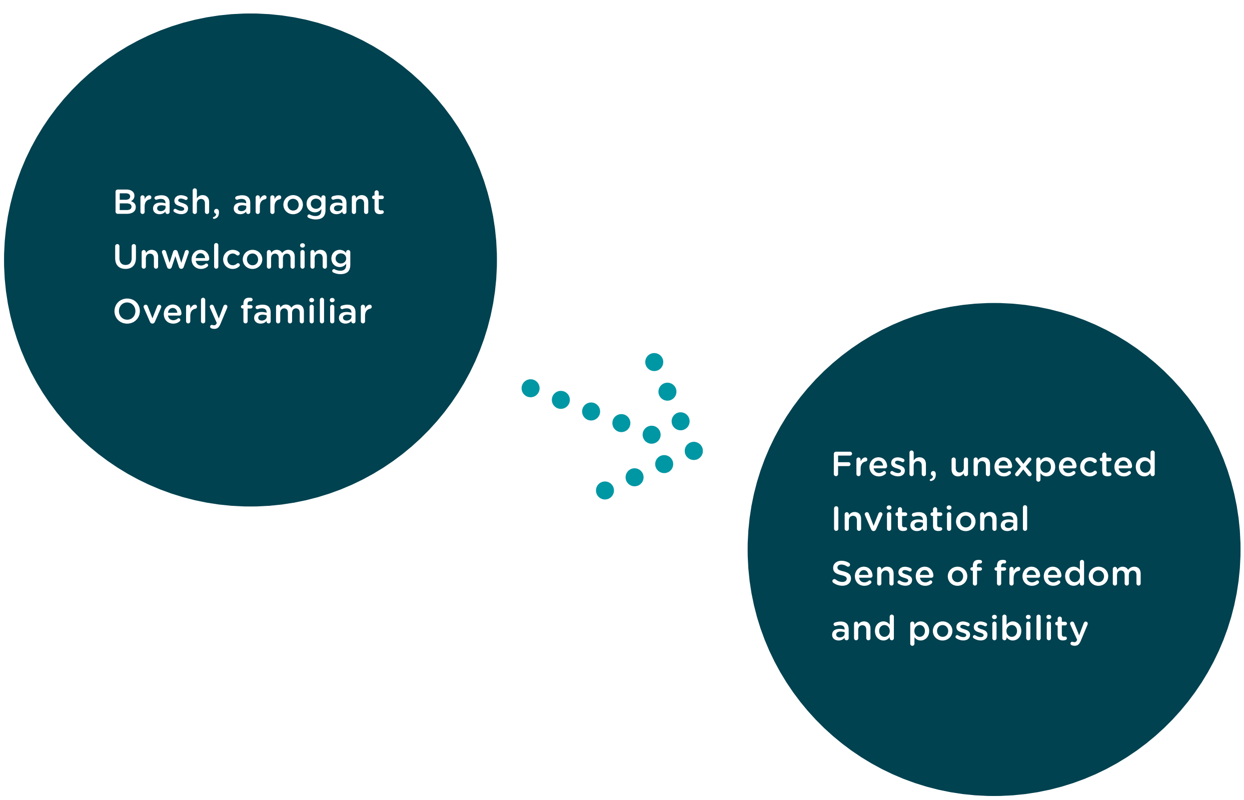
We had uncovered an embarrassment of riches — and landed right on top of our insight. We learned that what people love best about America, even more than the destination itself, are the very ideals the country was founded on: freedom, diversity and unbounded possibilities.

In order to get it right, we’d need to sell the destination AND the idea

The destination aspect alone doesn’t tell the full story of America. But selling the idea on its own could come across as more civics lesson than invitation.

The Creative Task

The sum of our learning helped us realize that in order to rekindle travelers’ love affair with America, we’d have to create a perceptual shift:



A Strategy to Bridge the Gap

Our brand theme became the catalyst for creating the necessary shift from being seen as an arrogant, unwelcoming and predictable nation, to that of a beckoning land of boundless possibilities.

Brand Strategy

"The United States of Awesome Possibilities Welcomes Everyone"

Starting With A Visual Identity System

Beyond the red, white and blue

Though the tourism category is rife with logos that leverage countries' biggest visual equities (e.g., Australia's kangaroo, Canada's maple leaf), our research informed our belief that we shouldn't lead with anything that would feel overly political or chest-beating.

So we eschewed the expected stars and stripes, and landed on a concept grounded in the ideals of diversity and unlimited possibilities; suggesting that each citizen, visitor and experience helps create the incredibly rich and diverse fabric that makes up this country. To underscore the sense of boundless possibilities, we provided a modular identity scheme in not just one color system, but ten.

USA
DiscoverAmerica.com

USA
DiscoverAmerica.com

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DiscoverAmerica.com

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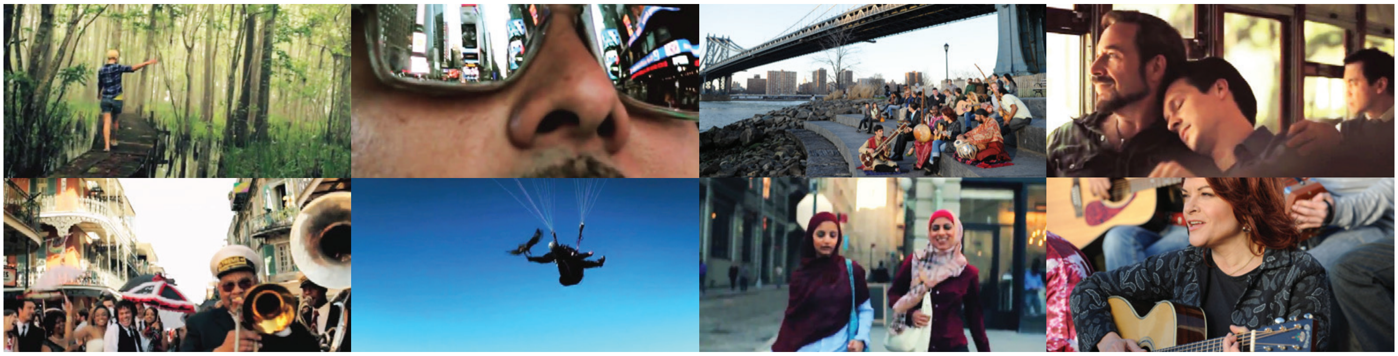


The Campaign

Communicating to an audience as big as the world

From those who were familiar with the US (such as Canadians and the Brits), to newer travelers from further afield — our communications would need to speak to them all. We'd have to demonstrate a breadth of possibilities, beyond what they thought they knew, and welcome them, as though for the first time.

After four rounds of creative-testing in 13 international markets, we landed on the idea of using the universal language of music as a cornerstone of the campaign. We felt that music would have the power to accomplish emotionally what words alone couldn't.

We reached out to Grammy Award winner, Rosanne Cash, daughter of American music icon Johnny Cash, to turn our insights into an original song that would invite the world to come experience America. While the song is distinctly "Americana" in tone, the welcome becomes universal as musicians from around the world unite with Rosanne in song.

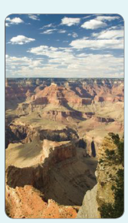
The song was married to visuals that show our greatest-hit landmarks (for new travelers), with off-the-beaten-path locales and experiences (for those who were overly familiar).

The result is an anthem that shows America the destination, while simultaneously emanating a feeling of freedom and limitless possibilities.

Watch the TV Spot

www.youtube.com/user/YourDiscoverAmerica

To help us focus our messaging about the range of experiences in the USA, we created 4 experience pillars. We use these pillars as a guide to help us as we craft messaging across all of our marketing platforms.

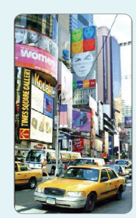


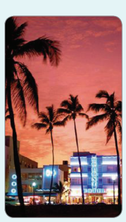
GREAT OUTDOORS

National, State, and Local Parks
Beaches and Coasts
Zoos and Aquariums
Camping and Fishing
Hiking and Biking
Gardens and Arboretums
Scenic Byways & Road Trips
Rail Travel
Recreation & Sports

URBAN EXCITEMENT

Big City Buzz
Iconic Architecture
Shopping
Walking Tours
Neighborhoods and Streetscapes
People Watching
(Celebs, see and be seen)
Performing Arts





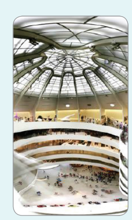
INDULGENCE

Theme Parks
Gaming
Spas
Resorts
Food/ Wine
Music
Night life

CULTURE

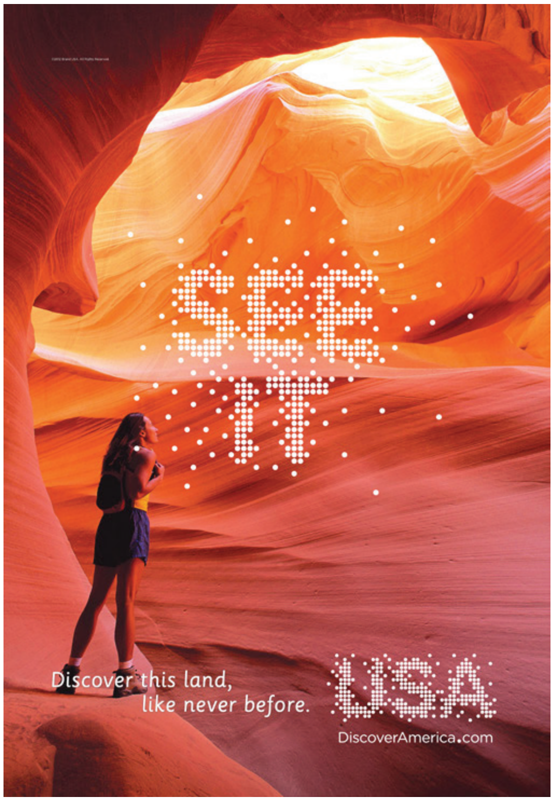
(History to Pop Culture)

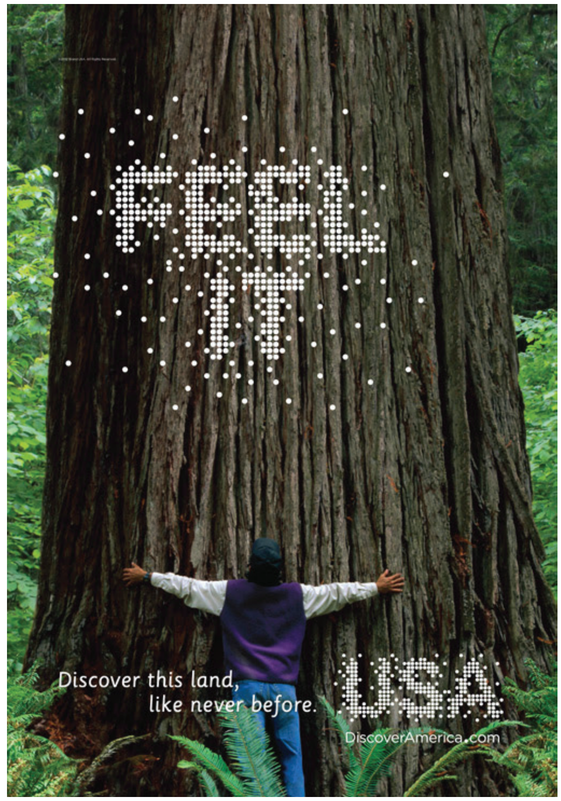
Art Galleries and Museums
Festivals and Events
Sporting Events
Landmarks and Historic Sites
Monuments and Memorials
Hollywood and Rock and Roll

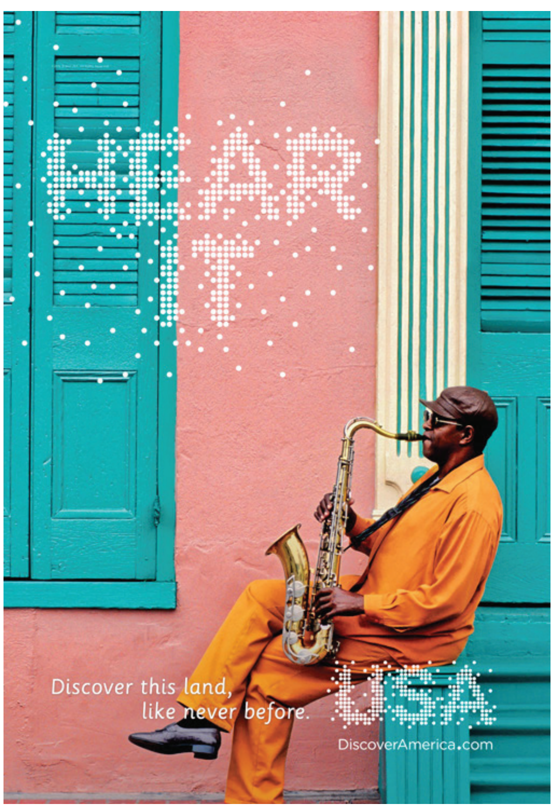


Print and Out of Home (OOH)

The print and OOH arouses the senses and conveys of personal and experiential possibilities.

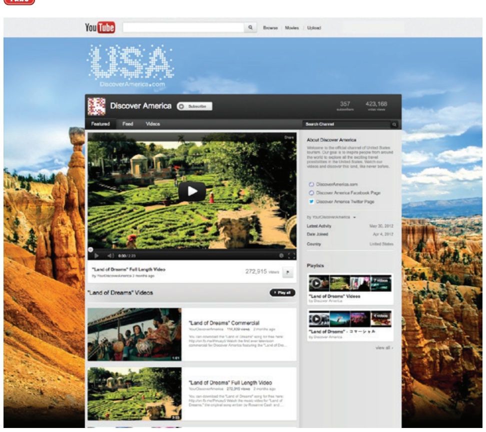


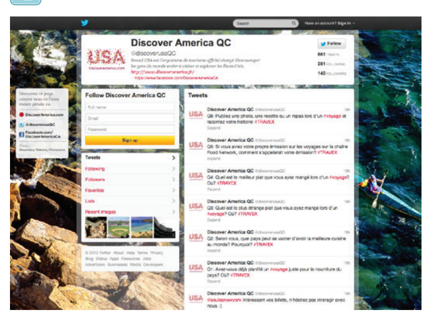




The website invites unlimited exploration of American experiences like never before, from the Austin music scene to Oklahoma cowboy culture and destinations large and small and in between.

Social media incites a global conversation and a contagious desire to share the possibilities.





Results

In the first eight weeks of the campaign in our three launch markets, we've succeeded in capturing the world's attention, and sparking the desire to discover the USA in new, unexpected ways.

Social Media Sentiments

99% positive sentiments

Land of Dreams

20K song downloads

YouTube Channel

500K views

Discover America.com Page Views

2MM in 3 months

The social media response has been overwhelmingly positive.

It's settled, next vacation I'm going back to America.
PoliSciCP 1 month ago

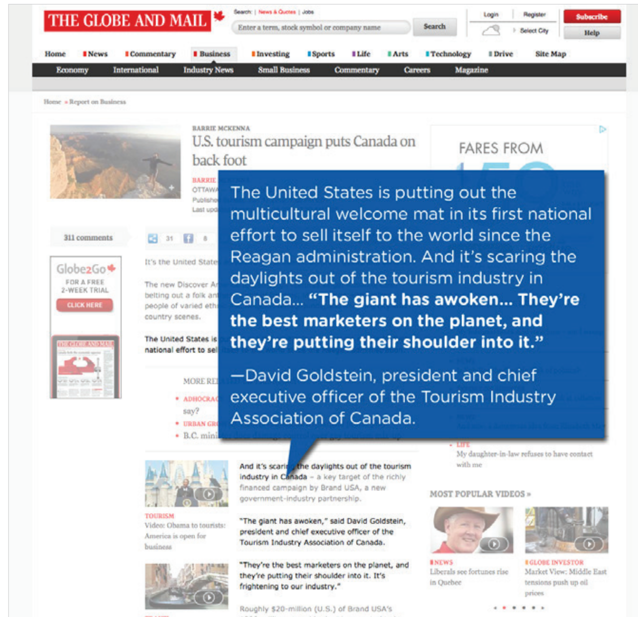
i'm a canadian, and this makes me want to vist the u.s! absolutely love this
MrMooMooMooCows 3 weeks ago

Ive just visited NYC & DC, I'm from England. America is a superb, amazingly exciting country. Its like a big movie set, also the people are so friendly and helpful (thanks stranger in DC metro). This song just captures its essence perfectly!
chrishac100 3 weeks ago

I absolutly love this commercial. I love the music, diversity, love the sites and scenes. My family and I vacation in the USA a lot as well as at home in Canada, and I think that we share a magnificent continent, something we should both be proud of.
LIN45DY73 1 week ago

Great song!!! Great video!!! I've always wanted to visit America but watching this makes want to even more!!! :D
Sending love all the way from England!!!! :)
ladeekool93 1 month ago 4

The industry has taken notice.



And tracking proves the perceptual shift is already underway!

The response so far has been better than we dared hope for. After JUST EIGHT WEEKS IN THE MARKET, initial tracking pre- and post-campaign across Japan and the UK has shown:

BRAND USA IMAGE ATTRIBUTES (UK)

Destination on its way up

vs. Pre-Launch

+21 pts

Intention to visit is up since campaign launch in core markets:

	Pre-Campaign	Post-Campaign
Japan	59%	67%
UK	51%	57%

Hall & Partners Pre- & Post-wave campaign tracking: Japan and UK

"A place where you always feel welcome"	+5 pts	Japan
"A place with limitless possibilities"	+10 pts	UK
"Has something for everyone"	+8 pts	UK
"Adventurous"	+11 pts	Japan
"Energetic"	+8 pts	UK
"Optimistic"	+11 pts	UK

And This Is Just the Beginning...

As we continue to welcome new and returning visitors to "Discover this land, like never before," we're on track to not only reignite people's love affair with America, but also demonstrate the power of strategically informed creativity to restore America's place on the world's must-see list.

Market Selection

Brand USA follows a simple, but powerful formula to select markets for the consumer campaign—with the key principle being where can we maximize results?

To determine the answer to that question, we evaluate six key factors:

VOLUME	# Visitors from Each Country
+	
VALUE	Total Revenue Value of Tourism from that Country
+	
GROWTH	YOY Growth (# Tourists + Overall Revenue
+	
COST OF MEDIA	Cost of Doing Business: In-Country Media Efficiencies (Lower = More Desirable)
+	
EASE OF ENTRY	Subjective Score for Barriers (visa requirements, waiting period, political)
+	
INFRASTRUCTURE	Brand USA Infrastructure In-Market (Representation Firm, Social Media, Website, Travel Strength of Trade/Media Support

The Brand USA Fully Integrated Consumer Campaign will Launch in Nine Markets during FY2013

This analysis led us to the decision to launch the Brand USA consumer campaign in nine markets during FY2013—returning first to the 2012 launch markets of Canada, Japan, and the United Kingdom in February and then expanding to five new markets: Mexico, Brazil, South Korea, Germany, Australia, and China.

In 2013, Brand USA is launching a powerful consumer campaign in markets that generate nearly **50 million** international travelers to the United States—spending nearly **$80 billion** and representing **more than 75% of all inbound travel to the USA.**

Every 1% incremental increase per year in travel to the United States from these markets would result in approximately 500,000 more international travelers crossing our borders to explore all that our country has to offer (source: OTTI 2011 International Visitor Profile).

More information about each of these markets can be found in the **Summary of Market Initiatives** section of this report.

CONSUMER TARGET AND MEDIA / MARKET STRATEGY & CAMPAIGN ELEMENTS

Leveraging and building on the momentum of the campaign launch from May 2012 as indicated by the pre- and post-wave study conducted by Hall and Partners, as well as the the deep market intelligence that guided the campaign's creative development, Brand USA will continue to use the established creative and incorporate, where applicable, greater partner integration.

Brand USA Target: A25-59

- Universally, local markets recommended targeting a segment, if not all of, Adults 25-59
  - Core Characteristics: Affluent, Educated Travelers
- In addition, we will plan media and approach keeping in mind any uniquely identified specific local demographic and/or psychographic traits to best reach travelers

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

Following the same planning and buying parameters (geography & target demo) as the initial launch in 2012, we will utilize TV, Out-Of-Home, Search & Social. We elected not to include a digital (display) component to the brand buy as we already have a strong digital presence through our Publisher Program coop and In-Kind Program.

Canada Media Buys

	Feb				Mar					Apr				May	Jun	Jul	Aug	Sep	GRPs / Units	Total Net + Fee Cost $
	28	04	11	18	25	04	11	18	25	01	08	15	22							
TELEVISION			:30s																	
:30s TV @ 60% Pr A25-54			**150**	**150**	**120**	**120**	**120**	**120**	**120**	**120**									1020	
English Regional Network			45	45	40	40	40	40	40	40									$330	$741,052
English Specialty			105	105	80	80	80	80	80	80									690	$646,558
TV Trafficking Charge																			1	$400
TOTAL TELEVISION – Client Net																				**$1,388,009**
DIGITAL OOH																				$440,655
Digtal OOH: Tor, Van, Mtl F :10s			16 boards at :10s per :60s loop																16	$307,535
Digtal OOH: Tor, Van, Mtl F :8s			21 boards at :8s per :48s loop																21	$133,120
Large Format, Dundas Square Toronto :60s			1 board at :60s per 5m loop																1	$0
Toronto Digital Subway and Mall Network :15s			Full Saturation at :15s per spot																All (TBC)	$0
TOTAL DIGITAL OOH – Client Net																				**$440,655**
SEARCH AND DIGITAL DISPLAY																				
Google search and contextual campaign																				$500,000
Digital Display – network Google and testing																				$60,000
TOTAL ONLINE – Client Net																				**$560,000**
GRAND TOTAL – Client Net																				**$2,388,665**

Japan Media Buys

(000USD)

	Feb 4	Feb 11	Feb 18	Feb 25	Mar 4	Mar 11	Mar 18	Mar 25	Apr 1	Apr 8	Apr 15	Apr 22	Apr 29	May	Jun	Jul	Aug	Sep	GRPs/ Units	Net Cost	Client Cost (inc TAX 5%)
Terrestrial TV																					
:15s TV Spot						59	59	59	59	59	59	58	58						470	$1,305.8	$1,439.6
Total TV Spot																			**470**	**$1,305.8**	**$1,439.6**
TV Programme																					
WBC Program Sponsor :30sec x 2																			WBC	$167.3	$184.5
Total TV Prog																				**$167.3**	**$184.5**
OOH																					
Train Vision (Chuo, Keihintohoku & Keio Line)					15sec														Train Vision	$43.8	$48.2
Total OOH																				**$43.8**	**$48.2**
Search																					
Google																				$400	$420.0
Digital display testing / contextual display – Google																				$60	$63.0
Yahoo Keyword Search																				$86.6	$100.0
Total Search																				**$546.6**	
Social																					
								4site 20M Impressions												$124.2	$139.6
Total Social																				**$124.2**	**$139.6**
																			TOTAL BUDGET	**$2,187.68**	

UK Media Buys

	Feb 4	Feb 11	Feb 18	Feb 25	Mar 4	Mar 11	Mar 18	Mar 25	Apr 1	Apr 8	Apr 15	Apr 22	Apr 29	May	Jun	Jul	Aug	Sep	GRPs	Client Cost (US$)
Terrestrial TV																				
60 sec	Feb 1																		10	$37,038
30 sec	Feb 2-3																		15	$55,556
30 sec with BA	Feb 4-March 4																		320	$1,185,183
Total TV																			**345**	**$1,277,777**
Search																				
Search																				$450,000
Digital display testing / contextual display – Google																				$60,000
Total Search																				**$510,000**
OOH																			**Units**	
48 sheet national campaign and transvision				Feb 25-Mar 10															Transvision: 17 Unit 48 sheets: 273 Unit	$593,225
Total OOH																				**$593,225**
																			TOTAL	**$2,381,001**

Media Market Strategy

Our overall strategy is that once we are in a market with with brand dollars, we will remain in that market at an optimal maintenance-level budget post launch. If there is a major change in environment, campaign traction, or other event, we will re-evaluate and adjust accordingly.

The 2013 plan is to run brand media for the consumer campaign in market during peak travel planning times. Currently, the consumer campaign is running in Canada (Feb-Mar & Jun-Jul), UK (Feb-Mar & Jul-Aug) & Japan (Mar-Apr & Jun-Jul). Additionally we are planning to add the following markets: Australia (Aug-Sept), Brazil (Jun-Aug), Germany (Jul-Aug), Mexico (May-Jun) and South Korea (Jun-Aug). In addition, we are currently evaluating the best time to launch in China – this year.

The total budgets, by market, for the activity running May-Sept 2013 will be determined by the amount of partner co-op activity in the market and current market conditions.

Campaign Creative

BRAND USA TV

The current plan is to utilize the brand TV creative as is for the 2013 activity. In addition, we are working with partners to develop Brand USA TV creative with greater partner integration.

PARTNER COOP TV

We are exploring more robust tags with partners. For example, we created a spot with British Airways to promote a seven-itinerary Megafam we have scheduled for May 2013. The specific time-frames for the campaign are currently being reviewed and will be adjusted as needed to optimize the rollout.

Summary of Market Initiatives

For FY2013, we will maximize the fully integrated campaign via travel trade and media outreach as shown in the summary below:

CANADA

- Advertising
  - TV, OOH, Print, Digital (Search & Display), Social
- Coop Programs
  - Publisher Programs
  - Joint Media Planning & Buying
  - Partner Advertising Coop / Brand USA logo inclusion
- Trade
  - Trade Shows
  - PR
  - Tour Operator Relations

UK & IRELAND

- Advertising
  - TV, OOH, Print, Digital (Search & Display), Social
- Coop Programs
  - Publisher Programs
  - Joint Media Planning & Buying
  - Partner Advertising Coop / Brand USA logo inclusion

JAPAN

- Advertising
  - TV, OOH, Print, Digital (Search & Display), Social
- Coop Programs
  - Publisher Programs
  - Joint Media Planning & Buying
  - Partner Advertising Coop / Brand USA logo inclusion
- Trade
  - Trade Shows
  - PR
  - Tour Operator Relations

Additional Market Roll-out in 2013

Australia
Brazil
China
Germany
Mexico
South Korea

WE PLAN TO HAVE THE FOLLOWING UP AND RUNNING IN 2013

- **Digital**
  - Market Specific DiscoverAmerica.com Website
  - Native Content (local language)
  - Social Media – in-market country managers
- **Advertising**
  - TV, OOH, Print, Digital (Search & Display), Social
- **Coop Programs**
  - Publisher Programs
  - Joint Media Planning & Buying
  - Partner Advertising Coop / Brand USA logo inclusion
- **Trade**
  - Trade Shows
  - PR
  - Tour Operator Relations

FRANCE & INDIA

- **Trade**
  - Establish in country Representation
- **Digital**
  - Develop Market Specific DiscoverAmerica.com Website to launch FY 2014
  - Native Content (local language)
  - Social Media – in-market country managers
- **Advertising & Co-op Programs**
  - Develop Objectives & Strategies in conjunction with in-market Reps
  - Launch FY 2014

Focus FY13 consumer campaign activity on the following objectives by market (number of markets, timing for campaign rollout, and marketing mix/spend per market dependent upon public and private funding):

ALL MARKETS

- Improve perceptions of the United States as a destination that is diverse, welcoming, and surprising or adventurous
- Increase awareness of the diversity of travel experiences in the United States
- Increase intent to travel to the United States among consumer audiences
- Increase intended length of stay in the United States
- Increase the quantity of and spending by international visitors
- Report stable data to benchmark campaign impact and optimize campaign effectiveness

UNITED KINGDOM (Feb-Mar & July-Aug 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- UK arrivals increase by 2% to approximately 3.9 million

JAPAN (Feb-Mar & Jun-Jul 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- Japanese arrivals increase by 3% to approximately 3.6 million

CANADA (Feb-Mar & Jun-Jul 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- Canadian arrivals increase by 4% to approximately 23.3 million

BRAZIL (June-Aug 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- Brazilian arrivals increase by 14% and exceed 2 million for the first time ever
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts

SOUTH KOREA (June-Aug 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- South Korean arrivals increase by 8% to approximately 1.4 million
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts

AUSTRALIA (Aug-Sept 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- Australian arrivals increase by 6% to approximately 1.2 million
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts

MEXICO (May-Jun 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- Mexican arrivals increase by 2% to approximately 14.5 million
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts

GERMANY (Jul-Aug 2013)

- Increase intent to travel by 10% post-wave among campaign recognizers vs. non-recognizers
- German arrivals increase by 4% to approximately 2 million
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts

CHINA (Fall/Winter 2013)

- Build the trade and digital infrastructure to launch a full consumer campaign in FY14 Q2
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts
- Begin to drive visitation through trade and in-market activities

INDIA

- Build the trade and digital infrastructure to launch a full consumer campaign in FY14 Q2
- Collect data to do a volumetric analysis and map the lag effect of Brand USA efforts
- Begin to drive visitation through trade and in-market activities

Additional markets under consideration for FY14 launch include France, Italy, and additional Latin American markets.

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

Market Profile: CANADA

USA TRAVEL

% AMERICA FANS = 41%

TOP USA DESTINATIONS

Florida
16%

New York
17%

TOP USA ACTIVITIES

Shopping
- 73% Participation

Sightseeing in Cities
- 45% Participation

Sports/Outdoors
- 32% Participation

Bar or Night club
- 23% Participation

Historic Site
- 22% Participation

TOP USA PILLARS

- All 4: Culture, Indulgence, Urban Excitement, Great Outdoors

USA BARRIERS?

- Stubborn and flamboyant
- Too similar – nothing new to see

BOOKING HABITS

BOOKING WINDOW:

- Immediate (Summer travel season)

BOOKING METHOD:

- Online: 28%
- Offline: 12%
- Online & Offline: 15%

Where would you travel
(if $ weren't a factor?

Canada Overview

Recent outbound activity from Canada to the US has been very strong and the forecast looks optimistic.

According to the most recent US Department of Commerce, Office of Travel and Tourism Industries (OTTI) reports (volume through July 2012):

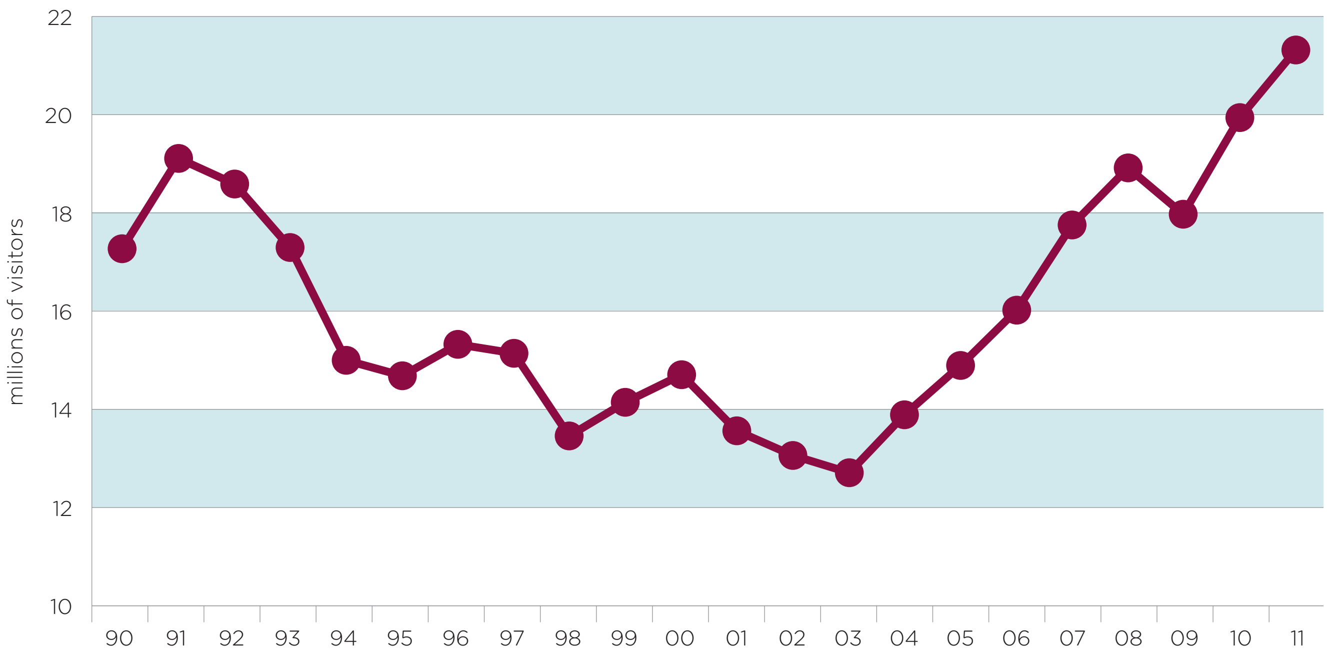
- Total Canadian arrivals to the US from Canada are up 6.3% to over 12.9 million (January-July, 2012) overnight visitors.
- The forecast for all of 2012 is an increase of 5% to over 22.4 million Canadian overnight visitors.
- Forecasts for 2013 and 2014 both show an expected increase of 4% to over 23.3 million and 24.2 million Canadian overnight visitors, respectively.
- Longer-term forecasts show the Canadian market providing the largest proportion of growth in visitation to the US over the next five years (29% of total growth).
- Economically, in 2011, Canadian visitors to the US spent a record $16.43 billion.
- Trip Purpose: in 2011, 52% of 21.3 million visiting Canadians came primarily for Leisure Holiday/Vacation.

According to Statistics Canada's data as of January 2013:

- Canadians took 5.5 million trips abroad in November 2012. Most of these trips, 4.7 million, were to the US (A 0.3% increase from October).
- A record number of Canadians visiting the US was expected for the final 2012 numbers.
- The most recent quarterly levels show about 14 million trips by Canadians to the US, the highest quarterly level since 1994.
- Travel to the US by Canadians increased in the third quarter of 2012 in all transportation categories.
- In terms of trade, Canada currently has a $3.8 billion travel deficit with the US (through the third quarter of 2012).

Canadian Traveler Volume to the United States – 1990-2011

(2011 – all travel segments – 1+ nights)



Source: Statistics Canada, August 2012

Top States Visited

(2011 – all travel segments – 1+ nights)

	US Destinations	(sort) Visitors (000s)	Visitor-Nights (000s)	Spending ($000s)
	TOTAL US (net)	21,344	176,107	$16,425,464
11	Border states (gross)	12,618	36,982	4,196,711
1	New York	3,701	10,281	$1,389,286
2	Florida	3,319	59,619	$4,029,060
3	Washington	2,587	7,492	$763,083
4	Michigan (+1)	1,542	4,547	$440,756
5	Nevada (+1)	1,481	6,944	$1,366,097
6	California (-2)	1,476	13,072	$1,376,037
7	Maine	947	3,141	$352,025
8	Pennsylvania	926	2,424	$259,758
9	Montana	888	3,409	$314,839
10	North Dakota	767	1,579	$246,121

Source: Statistics Canada, August 2012

Main Purpose of Trip

(2011 – all travel segments – 1+ nights)

Purpose of Trip	%
Holiday / Vacation	52.3%
Friends / Relatives	15.1%
Events / Attractions	6.1%
2nd Home...	5.1%
Conv. / Confer. / etc.	5.1%
Shopping	5.1%

Purpose of Trip	%
Meetings	4.5%
Personal	2.1%
Other Work	1.6%
Educational Study	0.7%
Transit through US	0.6%
Other	1.7%

Activities by Trip Purpose Trends

(2011 – 1+ nights)

Activity [1]	Total	Bus./Conv.	VFR [2]	Hol./Vac.	All Other
Shopping	76%	53%	72%	80%	79%
Sightseeing	44%	30%	37%	52%	26%
VFR [2]	32%	13%	93%	23%	22%
Sports/outdoors	28%	10%	22%	36%	10%
Bar or night club 23%	37%	15%	24%	15%	
Historic site	22%	17%	19%	25%	13%
National/state park	18%	7%	15%	23%	8%
Museum/art gallery	16%	14%	16%	18%	8%
Cultural events	13%	9%	11%	15%	6%
Casino	16%	8%	7%	20%	12%
Theme park	12%	5%	7%	16%	2%
Zoo/aquarium/etc.	11%	6%	10%	14%	5%
Golfing	9%	3%	6%	12%	2%
Attend sports events	9%	7%	8%	10%	5%
Festivals/fairs	7%	4%	8%	7%	2%
Boating-kayak/canoe	6%	2%	5%	7%	2%
Fishing	2%	0%	2%	2%	1%
Snow skiing/boarding	1%	0%	1%	2%	0%
Hunting	0%	0%	0%	0%	0%
No activity stated	6%	24%	3%	3%	8%
Activities Sum [3]	**345%**	**226%**	**351%**	**386%**	**217%**

1 Multiple activity selections are possible.

2 Visiting friends and relatives.

3 The sum of percentages across all activities reflects the "activeness" of Canadian travelers within any given travel segment or for a specific destination. This measurement is in lieu of an actual distribution of number of activities per survey record, which is not provided in the data.

Length of Stay Distribution

(2011 – all travel segments – 1+ nights)

Nights in the US	% of All Travelers	
1	11%	
2	19%	
3	14%	
4-6	22%	Mode, Median = 4 nights
7-9	16%	Mean avg. = 8.25 nights
10-13	7%	
14-16	4%	
17-20	2%	
21-30	2%	
31-59	2%	
60+	2%	

Month of Travel

(2011 – all travel segments – 1+ nights)

Month	%
January	6.5%
February	6.0%
March	9.2%
April	9.1%
May	8.7%
June	6.8%
July	11.1%
August	13.0%
September	8.3%
October	7.6%
November	7.3%
December	6.2%

Mode of Transportation

(mode of US border entry)
(2011 – all travel segments – 1+ nights)

Mode	%
Automobile	59%
Plane	35%
Bus	3%
All Other	3%

How a Travel Dollar is Spent

(2011 – all travel segments – 1+ nights)

% of total visitor spending in the United States	%
Accommodations	33%
Food / Beverage	22%
Shopping, Souvenirs	19%
Transportation	14%
Recreation and Entertainment	12%

CONSUMER AND TRADE ACTIVITY TO DATE

- Consumer Brand campaign launched in May of 2012 running through early August 2012. The campaign was supported by; Broadcast TV, OOH, Digital Display, Search and Social.
- **Airline Partnerships**
  - Discussions begun with targeted airline partners in Canada. Initial engagement with WestJet has yielded in-kind contributions via advertising (awaiting evaluation for FY'13 monetization).
- **OTA/Packaged Travel Providers**
  - Discussions are underway with a major Canadian Online Travel Agency/Packager/Tour Operator regarding a multi-level partnership.
- **Discover America – Canada**
  (formerly Visit USA Canada Committee)
  - Brand USA presented and met with the organization in June 2012 to review opportunities to engage.
  - Brand USA co-sponsored trade event in August 2012 revolving use of Roseanne Cash meeting with Discover America – Canada members.
- **Trade Engagement and Industry Outreach**
  - Discover America Day Canada (October 2012) – Brand USA was a co-sponsor, and contracted representative, Niche Marketing, presented on behalf of the organization for an audience of travel agents, airline representatives, OTA's, and others leaders of the Canadian travel Trade selling travel to the US (and among dozens of US suppliers attending the event) at this annual gathering organized by ACT Communications.

PLANNED CONSUMER AND TRADE ACTIVITY

- **Consumer Brand Campaign**
  - Campaign will run February through March, and again June through July 2013.
  - The campaign will be supported by: Broadcast TV, OOH, Digital Display, Search and Social.
  - In addition to our Brand Campaign, there are several Brand USA lead coop programs running throughout 2013 such as our Publisher Programs and Partner – Joint Media Planning & Buying.
- **Airline Partnerships**
  - Plans to complete negotiations and implement partnerships with airlines.
- **OTA/Packaged Travel Providers**
  - Complete negotiations and implement partnership with itravel2000 in FY'13
- **Discover America – Canada**
  (formerly Visit USA Canada Committee)
  - Continue to work with and support the efforts of this group, while utilizing those relationships for partnership development.
- **Trade Engagement and Industry Outreach**
  - Grow our presence at leading trade opportunities (both distribution channel and travel trade media) as opportunities arise. Opportunities this Spring in addition to those mentioned in 2012 may included: Canada Media Marketplace (April); The Travel and Vacation Show (March); the Mountain Travel Symposium (April); and the Travel and Tourism Research Association Intl. Conference (June).

Market Profile: JAPAN

USA TRAVEL

% AMERICA FANS = 32%

TOP USA DESTINATIONS

Hawaii
41.1%

California
15.3%

New York State
9.3%

TOP USA ACTIVITIES

Shopping
- 92% Participation

Dining
- 88% Participation

Sightseeing in Cities
- 45% Participation

Water Sports/Sunbathing
- 38% Participation

Visit Small Towns
- 29% Participation

TOP USA PILLARS

- Indulgence
- Urban Excitement

USA BARRIERS

- Expensive to get there
- Artificial (but Disney is also what they love about it)

BOOKING HABITS

BOOKING WINDOW:

- 2.5mos (May, Aug-Sept)

BOOKING METHOD:

- Online: 37%
- Offline: 11%
- Online & Offline: 14%

Where would you travel
(if $ weren't a factor?)

Japan Overview

- Project +1% GDP growth for FY2012 and +1.5% for FY2013. The government has set a target of 2% annual inflation and a stimulus budget, and as a result, the yen has plummeted from 79.46 to 89.52 to the dollar in the last 2 months alone.
- 17 million Japanese traveled abroad between January and November, a 9.8% increase year-on-year. 2012 is on track to surpass the all-time high, with continued growth in 2013 to 19 million passengers.
- Japan is the #1 spending overseas source market for the US and the 2nd largest overseas market for the US in terms of visitation numbers
- Between January and July, 2 million Japanese visited the USA, a 14.6% increase from 2011. At this rate, Japan will surpass the UK to become the #1 overseas market by the end of the year in terms of number of visitors as well as spend.
- There are 581 direct flights connecting Japan to 18 cities in the USA.
- Japan now has four brand new direct non-stop gateways into the US – Boston, San Diego, and San Jose, with Denver opening from March 31st courtesy of United Airlines.
- In March, Delta Air Lines will shift its Haneda-Detroit route to Haneda-Seattle.

Visitation Trends (Arrivals)

[Thousands of Japan Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	3,748	3,884	3,673	3,531	3,250	2,918	3,386	3,250	-498
Percentage Change (%)	18	4	-5	-4	-8	-10	16	-4	-13

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$13,094	$16,524	$14,586	$14,470	$14,554	$13,049	$14,430	$14,755	$1,661
Travel Receipts	$10,051	$12,735	$11,258	$11,035	$10,784	$9,495	$10,123	$10,141	$90
Passenger Fare Receipts	$3,043	$3,789	$3,328	$3,435	$3,770	$3,554	$4,307	$4,614	$1,571
Change (%) in Total Exports	31	26	-12	-1	1	-10	11	2	13

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	73	71	-2.6
Business/Professional	12	11	-0.4
Visit Friends/Relatives	9	11	1.8
Convention/Conference	4	4	0.1
Net Purposes of Trip			
Leisure & VFR	87	86	-0.6
Business & Convention	17	16	-0.6

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	92	93	0.9
Dining in Restaurants	88	87	-1.0
Sightseeing in Cities	45	45	0.8
Water Sports/Sunbathing	38	35	-3.5
Visit Small Towns	29	29	-0.5
Guided Tours	21	25	3.5
Amusement/Theme Parks	13	16	3.3
Visit Historical Places	12	15	3.5
Touring Countryside	15	14	-0.6
Cultural Heritage Sites	9	11	1.8

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Travel Agency	45	48	2.5
Personal Computer	49	45	-3.9
Tour Company	27	24	-2.6
Travel Guides	18	17	-0.4

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	70	70	-0.2 days
Advance Trip Decision Time (median days)	60	60	0.0 days
Prepaid Package	40%	40%	-0.1 pts.
First International Trip to the US	24%	31%	7.1 pts.
Length of Stay in US (mean nights)	8.4	8.2	-0.2 nights
Length of Stay in US (median nights)	4	4	0 nights
Number of States Visited (% 1 state)	89%	87%	-2.2 pts.
Average Number of States Visited	1.2	1.2	0.0 states
Hotel/Motel (% 1+ nights)	94%	93%	-0.2 pts.
Average # of Nights in Hotel/Motel	6.3	5.7	-0.6 nights
Travel Party Size (mean # of persons)	1.9	1.9	0.0
Gender: % Male (among adults)	55%	56%	1.1 pts.
Household Income (mean average)	$97,800	$102,400	$4,600
Household Income (median average)	$88,000	$94,100	$6,100
Average Age: Female	36	37	0.2 years
Average Age: Male	45	44	-1.1 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Taxi/Cab/Limousine	47	45	-2.3
City Subway/Tram/Bus	30	35	5.1
Rented Auto	23	21	-2.5
Bus between Cities	19	19	-0.4
Company or Private Auto	17	18	0.7

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Pacific Islands	66.3	2,245	64.5	2,096
Pacific	16.2	549	17.7	575
Middle Atlantic	10.4	352	10.4	338
South Atlantic	6.2	210	6.1	198
East North Central	3.4	115	4.6	149
STATES / TERRITORIES				
Hawaiian Islands	**	**	39.1	1,271
Guam	27.7	938	25.3	822
California	15.3	518	16.9	549
New York	9.3	315	9.5	309
Illinois	**	**	3.0	97
CITIES				
Honolulu	**	**	34.3	1,115
New York City-WP-Wayne	8.9	301	9.4	305
Los Angeles	8.1	274	8.9	289
San Francisco	**	**	5.9	192
Chicago	**	**	2.7	88

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

(**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: http://tinet.ita.doc.gov/research/programs/ifs/index.html.

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

CONSUMER AND TRADE ACTIVITY TO DATE

- **Japan – US Tourism Exchange Year**
  - Launched "Japan-US Tourism Exchange Year" with the Japan Association of Travel agents (JATA) with a goal of generating 3.75 million inbound travelers from Japan to the United States by 2016
- **JATA Travel Showcase 2012**
  - Hosted the largest pavilion among all JATA Travel Showcase participants, comprised of 30 partners and 62 booths participated in the Brand USA pavilion.
  - Organized media round table and TV interviews generating total unpaid media coverage valued at over $230,000.
- **Brand USA Logo Exposure on all major Travel Agency Brochures**
  - Brand USA logos were featured by top Japanese travel agents HIS, JALPAK, JTB, KNT, NTA, and R&C Tours with 5.9 million brochures printed.
- **"Deeply Discover America" Seminar**
  - A series of 10 seminars with JATA and DMOs to educate US related travel agents on 10 themes to provide deeper knowledge of the US beyond the gateways.

PLANNED CONSUMER AND TRADE ACTIVITY

- **Consumer Brand Campaign**
  - Campaign will run February through March, and again June through July 2013.
  - The campaign will be supported by: Broadcast TV, OOH, Digital Display, Search and Social.
  - In addition to our Brand Campaign, there are several Brand USA lead coop programs running throughout 2013 such as our Publisher Programs and Partner – Joint Media Planning & Buying.
- **World Baseball Classic Promotion**
  - Leveraging the visit of Bobby Valentine as a Brand USA ambassador to secure maximum media coverage.
- **US Tour of the Year Contest hosted by JATA**
  - JATA will award a "US Tour of the Year Award" to the best US tour package created after the "Deeply Discover America" Seminar series.
- **Upcoming Regional Seminars with DMOs**
  - Seminars have already been conducted in Sapporo and Hiroshima, and upcoming seminars will cover Osaka and other key secondary Japan markets.

Market Profile: UNITED KINGDOM

USA TRAVEL

% AMERICA FANS = 39%

TOP USA DESTINATIONS

Florida 31.3%	**California** 16.1%
New York 27.8%	**Nevada** 12.4%

TOP USA ACTIVITIES

Dining
- 94% Participation

Shopping
- 88% Participation

Sightseeing in Cities
- 45% Participation

Visit Historical Places
- 42% Participation

Amusement/Theme Parks
- 34% Participation

TOP USA PILLARS

- Culture
- Urban excitement

USA BARRIERS

- Been there, done that.
- Long shelf life

BOOKING HABITS

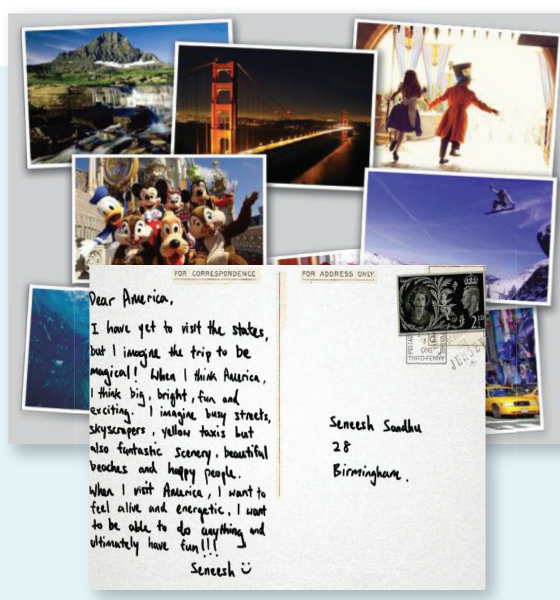
BOOKING WINDOW:

- 3-4mos (Jun-Sept travel season)

BOOKING METHOD:

- Online: 43%
- Offline: 8%
- Online & Offline: 23%

Where would you travel
(if $ weren't a factor?



United Kingdom Overview

The holiday market held relatively steady in 2012 in the face of low consumer confidence levels and little sign of economic recovery. According to the Office for National Statistics (ONS), in 2012 UK residents made an estimated 50.3 million visits abroad, unchanged from 2011. Package holidays increased according to the ABTA Consumer Trends Survey. In 2012 nearly half (48%) of people who took a foreign holiday, booked it as a package, compared to 42% in 2011 and 37% in 2010. The all-inclusive market performed well in 2012 as holidaymakers valued the all-inclusive holidays. The number of people booking an overseas holiday through a high street travel agent rose slightly in 2012, with 27% booking through a high street travel agent compared to 25% in 2011. With low economic growth forecast in the UK economy and weak consumer confidence, 2013 looks to be another challenging year for the travel industry.

Visitation Trends (Arrivals)

[Thousands of U.K. Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	4,303	4,345	4,176	4,498	4,565	3,899	3,851	3,835	-467
Percentage Change (%)	9	1	-4	8	1	-15	-1	0	-11

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$12,655	$13,492	$13,310	$14,938	$16,716	$11,429	$11,302	$11,974	-$681
Travel Receipts	$9,701	$10,824	$10,946	$12,120	$13,155	$8,884	$8,618	$8,968	-$733
Passenger Fare Receipts	$2,954	$2,668	$2,364	$2,818	$3,561	$2,545	$2,684	$3,006	$52
Change (%) in Total Exports	12	7	-1	12	12	-32	-1	6	-5

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 5 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	63	60	-3.3
Visit Friends/Relatives	20	22	1.7
Business/Professional	14	15	0.7
Convention/Conference	2	2	0.1
Study/Teaching	1	2	0.6
Net Purposes of Trip			
Leisure & VFR	87	87	-0.9
Business & Convention	18	19	1.4

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 11 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Dining in Restaurants	94	94	0.1
Shopping	88	87	-1.6
Sightseeing in Cities	45	44	-0.6
Visit Historical Places	42	41	-1.3
Amusement/Theme Parks	34	32	-2.3
Visit Small Towns	27	26	-1.1
Water Sports/Sunbathing	28	25	-2.3
Cultural Heritage Sites	25	23	-2.2
Art Gallery/Museum	22	21	-0.9
Visit National Parks	21	20	-1.0
Touring Countryside	22	20	-1.6

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Personal Computer	48	48	-0.7
Travel Agency	30	30	-0.6
Airlines Directly	27	27	0.4
Friends/Relatives	18	17	-0.4

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	130	128	-2.1 days
Advance Trip Decision Time (median days)	90	90	0.0 days
Prepaid Package	22%	18%	0.7 pts.
First International Trip to the US	17%	18%	0.7 pts.
Length of Stay in US (mean nights)	13.7	14.6	0.9 nights
Length of Stay in US (median nights)	11	10	-1 nights
Number of States Visited (% 1 state)	72%	72%	0.6 pts.
Average Number of States Visited	1.4	1.5	0.1 states
Hotel/Motel (% 1+ nights)	80%	78%	-2.0 pts.
Average # of Nights in Hotel/Motel	8.5	8.8	0.3 nights
Travel Party Size (mean # of persons)	1.8	1.8	0.0
Gender: % Male (among adults)	48%	48%	0.3 pts.
Household Income (mean average)	$102,800	$106,600	$3,800
Household Income (median average)	$89,400	$94,100	$4,700
Average Age: Female	43	43	-0.4 years
Average Age: Male	47	44	-2.8 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Taxi/Cab/Limousine	46	46	0.0
Rented Auto	33	31	-1.6
Company or Private Auto	24	25	1.0
City Subway/Tram/Bus	22	21	-0.7
Airlines in US	20	18	-2.1

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
South Atlantic	41.2	1,587	38.4	1,473
Middle Atlantic	32.0	1,232	32.7	1,254
Pacific	17.3	666	18.9	725
Mountain	15.3	589	14.7	564
STATES				
Florida	31.3	1,205	29.6	1,135
New York	27.8	1,071	28.5	1,093
California	16.1	620	17.7	679
Nevada	12.4	478	11.4	437
CITIES				
New York City-WP-Wayne	27.4	1,055	27.9	1,070
Orlando	21.8	839	20.0	767
Las Vegas	12.3	474	11.1	426
Los Angeles	8.8	339	9.4	361
San Francisco	**	**	8.0	307

Notes:

U.K. includes residents of England, Scotland, Wales, and Northern Ireland.

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

(**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: http://tinet.ita.doc.gov/research/programs/ifs/index.html.

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

CONSUMER AND TRADE ACTIVITY TO DATE

Tour Operator Programs

- Launched **Fam Photo Competition** with tour operators in the UK
- Solicited **TV production** ideas to promote US destinations in the UK
- Held Inaugural **Tour Operator Advisory Board** in the UK
- Held **development meetings** with more than 150 key US suppliers, tour operators, OTAs, travel agencies, and trade media in the UK—leading to lucrative partnerships
- Launched media partnerships in the UK with the Independent, the Evening Standard, the Guardian, the Telegraph, and UltraTravel—garnering 50 million impressions and coverage of all 50 states and creating rich online complementary content (October through December 2012)

PLANNED CONSUMER AND TRADE ACTIVITY

- **Consumer Brand Campaign**
    - Campaign will run February through March, and again June through July 2013.
    - The campaign will be supported by: Broadcast TV, OOH, Digital Display, Search and Social.
    - In addition to our Brand Campaign, there are several Brand USA lead coop programs running throughout 2013 such as our Publisher Programs and Partner – Joint Media Planning & Buying.
- **Social learning platform** under construction.
- **Megafam for 100** agents taking place in May 2013 in partnership with British Airways and American Airlines – underpinned by booking incentive program and trade media partnership with TTG.
- **Signed LOAs** with Virgin Holidays, Scenic Tours, Black Tomato, Southall Travel, Tour America for a total value $6.3 million.
    - $7.1 million additional in LOAs pending – further partnerships in negotiation.
- **TV Production** – potential to develop three television partnerships resulting from BD initiative.
- **ESPN** – United States of Sport, Get in the Game, sporting calendar for DiscoverAmerica.com
- **The Guardian** – Travel like a local six-month campaign – to include additional Partner buy in opportunities
    - Additional media partnership plans, include Mail on Sunday, The Daily Telegraph /The Sunday Telegraph, Sunday Times Travel Magazine / Irish Times, Condé Nast

Market Profile: MEXICO

USA TRAVEL

% AMERICA FANS = 29%

TOP USA DESTINATIONS (AIR TRAVEL)

Florida captures nearly 50% of the market, followed by New York and California

TOP USA ACTIVITIES

Shopping
- 81% Participation

Dining
- 69% Participation

Visit Historical Places
- 30% Participation

Amusement/Theme Parks
- 29% Participation

Sightseeing in Cities
- 22% Participation

Visit Small Towns
- 21% Participation

*note: Party/nightlife is an American attraction for Mexicans more than any other market

TOP USA PILLARS

- Urban Excitement
- Culture
- Indulgence

USA BARRIERS

- Unwelcoming/rude
- Arrogant
- There are more interesting places to visit

BOOKING HABITS

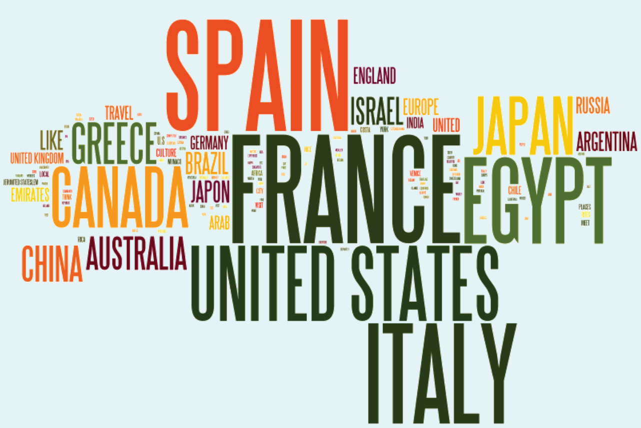
BOOKING WINDOW:

- Immediate (Summer Jun-Sept)

BOOKING METHOD:

- Online: 18%
- Offline: 11%
- Online & Offline: 38%

Where would you travel
(if $ weren't a factor?



Visitation Trends (Arrivals)

[Thousands of Mexico (Air Only) Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	1,494	1,668	1,713	1,878	1,708	1,511	1,675	1,950	537
Percentage Change (%)	10	12	3	10	-9	-12	11	16	31

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Travel Receipts	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Passenger Fare Receipts	Data Unavailable								
Change (%) in Total Exports	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	50	49	-1.0
Visit Friends/Relatives	19	24	4.8
Business/Professional	20	19	-1.1
Convention/Conference	7	5	-2.0
Net Purposes of Trip			
Leisure & VFR	80	81	1.1
Business & Convention	29	26	-2.8

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	81	84	2.7
Dining in Restaurants	69	70	1.2
Visit Historical Places	30	30	0.3
Amusement/Theme Parks	29	28	-1.0
Sightseeing in Cities	22	23	0.9
Visit Small Towns	21	18	-2.7
Art Gallery/Museum	16	16	-0.2
Concert/Play/Musical	15	13	-1.7
Nightclubs/Dancing	13	11	-1.4
Cultural Heritage Sites	11	11	-0.5

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Personal Computer	39	43	4.4
Travel Agency	29	27	-2.5
Airlines Directly	25	24	-1.4
Friends/Relatives	11	12	1.1

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	48	55	7.3 days
Advance Trip Decision Time (median days)	30	30	0.0 days
Prepaid Package	10%	9%	-0.3 pts.
First International Trip to the US	9%	8%	-1.4 pts.
Length of Stay in US (mean nights)	10.4	12.0	1.6 nights
Length of Stay in US (median nights)	6 6	0 nights	-1 nights
Number of States Visited (% 1 state)	83%	89%	5.6 pts.
Average Number of States Visited	1.2	1.1	-0.1 states
Hotel/Motel (% 1+ nights)	79%	71%	-8.3 pts.
Average # of Nights in Hotel/Motel	6.2	6.7	0.5 nights
Travel Party Size (mean # of persons)	1.5	1.6	0.1
Gender: % Male (among adults)	60%	53%	-6.2 pts.
Household Income (mean average)	$84,000	$81,800	-$2,200
Household Income (median average)	$66,400	$66,300	-$100
Average Age: Female	38	37	-1.3 years
Average Age: Male	42	41	-1.1 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Rented Auto	29	32	3.3
Taxi/Cab/Limousine	38	30	-8.1
Company or Private Auto	27	28	0.5
Airlines in US	22	23	1.0
City Subway/Tram/Bus	15	11	-4.1

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Middle Atlantic	17.1	286	**	**
STATES				
New York	14.9	250	**	**
CITIES				
New York City-WP-Wayne	14.5	243	**	**

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

n/a = Not available.

(**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: http://tinet.ita.doc.gov/research/programs/ifs/index.html.

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

Market Profile: BRAZIL

USA TRAVEL

% AMERICA FANS = 39%

TOP USA DESTINATIONS (AIR TRAVEL)

New York City and Mid-Atlantic states captured 49.4% of travelers

TOP USA ACTIVITIES

Dining in Restaurants
- 91% Participation

Shopping
- 91% Participation

Amusement/Theme Parks
- 55% Participation

Visit Historical Places
- 52% Participation

Sightseeing in Cities
- 41% Participation

TOP USA PILLARS

- Indulgence
- Urban excitement
- Culture
- Note: Brazilians self-report shopping as their top activity while here and motivator to visit

USA BARRIERS

- Visa issues #1 (not welcoming)
- More exciting places to visit

BOOKING HABITS

BOOKING WINDOW:

- 2-3mos (Dec-Feb)

BOOKING METHOD:

- Online: 26%
- Offline: 8%
- Online & Offline: 17%

Where would you travel (if $ weren't a factor?

Brazil Overview

SNAPSHOT

- GDP 3%
- Unemployment lowest ever 5%
- Exports highest level ever
- Biggest surplus on trade balance
- Inflation on target
- International investment biggest ever, so all economic data very positive.

CONSUMER TRENDS INCLUDE:

- Strong housing market, domestic travel, strong automobile market
- Outbound travel is on the rise – especially to Europe and USA
- Brazilians expenditure abroad surpassed $20 billion in the first six months of 2012 (a record)
- Sports are a significant economic driver – 2 major world sports events are around the corner with World Cup 2014 and Olympics 2016 (which mean major investments in infrastructure)
- Domestic travel is up 25,2%
- International travel is up 19,4%
- Outbound markets: Europe 4.2 million; South America 2.1 million; USA 1.8 million
- Most carriers added flights into the market in 2012: European 4 new daily flights, US 2 new daily flights. For 2013 they are saying they will keep increasing flights and seat capacity to the market bringing bigger aircrafts
- Strong competition from middle-east as a result of air carriers offering new non stop flights to Dubai, Istanbul, Tel-Aviv, Beirut and Doha

IN-BOUND USA ARRIVAL STATISTICS AND TOP DESTINATIONS IN THE US:

- Arrivals to the USA up 17,7% Jan-Jun 2012 (4th overseas market after UK, Japan, Germany).
- Miami, Orlando, NYC, Los Angeles and San Francisco are the top destinations for Brazilian, Florida has almost 50% of the share, followed by NY & California.
- Expenditures by Brazilians in the USA near to 10 billion dollars, what makes Brazil the 3rd most important overseas market in expenditures (after Japan and UK).

TRAVEL OPERATOR ACTIVITY:

- Tour operators bookings for 2013 are up 3%-- with Europe and USA the main international destinations
- Tour operators report that US destinations are investing in the Brazilian market for the first time, including Chicago, Arizona, Massachusetts)
- All US Theme Parks made record sales for the year 2012

Visitation Trends (Arrivals)

[Thousands of Brazilian Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	385	485	525	639	769	893	1,198	1,508	1,124
Percentage Change (%)	10	26	8	22	20	16	34	26	292

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$1,870	$2,201	$2,654	$3,129	$4,162	$4,565	$6,230	$8,453	$6,583
Travel Receipts	$1,375	$1,577	$1,947	$2,284	$2,990	$3,318	$4,473	$5,878	$4,503
Passenger Fare Receipts	$495	$624	$707	$845	$1,172	$1,247	$1,757	$2,575	$2,080
Change (%) in Total Exports	11	18	21	18	33	10	36	36	352

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	64	66	2.2
Business/Professional	14	16	2.6
Visit Friends/Relatives	12	9	-2.6
Convention/Conference	7	5	-2.6
Net Purposes of Trip			
Leisure & VFR	86	84	-2.1
Business & Convention	23	25	1.5

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	91	95	3.9
Dining in Restaurants	91	89	-2.4
Visit Historical Places	52	51	-0.6
Amusement/Theme Parks	55	47	-7.4
Sightseeing in Cities	41	40	-0.9
Art Gallery/Museum	34	32	-2.5
Concert/Play/Musical	30	30	0.5
Visit Small Towns	19	21	1.3
Cultural Heritage Sites	25	21	-4.4
Visit National Parks	16	19	2.6

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Travel Agency	48	46	-1.5
Personal Computer	36	44	8.6
Airlines Directly	28	25	-3.0
Friends/Relatives	23	25	2.2

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	91	101	10.3 days
Advance Trip Decision Time (median days)	65	70	5.0 days
Prepaid Package	14%	12%	-1.6 pts.
First International Trip to the US	23%	26%	3.4 pts.
Length of Stay in US (mean nights)	14.9	16.7	1.8 nights
Length of Stay in US (median nights)	10	11	1 nights
Number of States Visited (% 1 state)	60%	60%	0.9 pts.
Average Number of States Visited	1.5	1.6	0.1 states
Hotel/Motel (% 1+ nights)	86%	88%	1.7 pts.
Average # of Nights in Hotel/Motel	9.4	10.0	0.6 nights
Travel Party Size (mean # of persons)	1.6	1.5	-0.1
Gender: % Male (among adults)	55%	55%	0.6 pts.
Household Income (mean average)	$101,700	$91,300	-$10,400
Household Income (median average)	$97,600	$81,000	-$16,600
Average Age: Female	38	41	2.5 years
Average Age: Male	41	41	-0.5 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Rented Auto	39	41	2.1
Airlines in US	40	41	0.7
Taxi/Cab/Limousine	41	41	-0.4
City Subway/Tram/Bus	27	27	0.4
Company or Private Auto	22	19	-3.4

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Middle Atlantic	51.1	612	50.4	760
STATES				
New York	49.3	591	47.9	722
CITIES				
New York City-WP-Wayne	49.4	592	47.8	721

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

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Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

CONSUMER AND TRADE OPPORTUNITIES

- Convince the US players operating in Brazil to be more involved and supportive with Brand USA activities (airlines, hotels, cruise and rental cars), so far mostly the theme parks have embraced the efforts and a few destinations
- Coordination of Brand USA paviliions at WTM Latin America and ABAV
- Have more Brazilian tour operators to reach out consumers with Brand USA message thru their own media campaign
- Participate at Visit USA activities and meetings
- Finalize the participation of TAM airlines in a major marketing campaign for 2013
- Increase investment in PR activities—but not just targeting the travel trade. Consider working with some TV talk show programs to have the USA featured in key consumer channel travel sections
- Finalize the RFP process
- Work with tour operators to expand their USA products
- Participate at other international travel shows were Brand USA will have a presence (Fitur, Fita, Fit)

KEY BRAND USA ACTIVITY AND MARKET BUZZ

- TAM Airlines will launch a major campaign in 2013 that includes Brand USA
- Currently working with other major players in the market to co-op in their marketing campaigns
- The market is anxious to learn when Brand USA will roll out its campaign in Brazil.

TOP ACCOUNTS AND PENDING ACTIVITY

- **Tam Airlines** – marketing activities to be implemented in 1 qtr, newspaper and magazine adds, fam tours
- **Royal Carribean** – stil waiting for a go ahead from head quarters
- **TAM Viagens** – online, brochures and magazines media campaign rolling out
- **Sea World Parks** – final discussion for a marketing campaign in 2 quarter
- **Designer Tours** – already advertising on magazine high end media
- **US carriers** – frozen, still waiting from headquarters go ahead

OVERVIEW OF BRAND USA MARKETING PROGRAMS IMPLEMENTED IN BRAZIL

- Market is anxious to learn when Brand USA will roll out the consumer marketing campaign (which is scheduled to launch in July, but has not yet been announced)
- First ever Brand USA pavilion at ABAV Rio de Janeiro, Visit USA events and Braztoa meeting in 2012
- A few operators started their own media campaigns in the 3rd and 4th quarter of calendar year 2012 (Tam Viagens, Agaxtur, Designer Tours, ADV Tour, Trade Tours) comprised of advertising online and in newspaper and travel magazines

OVERVIEW OF FY 13 TRADE SHOWS, EVENTS, VUSA ACTIVITIES

- ABGEV MICE encounter Sao Paulo – February
- WTM Latin America Brand USA pavilion in Sao Paulo – April
- VISIT USA show in Sao Paulo – May
- BRAZTOA meetings Sao Paulo – September
- ABAV Fair of the Americas in Sao Paulo for the first time – September

Market Profile: SOUTH KOREA

USA TRAVEL

% AMERICA FANS = 40%

TOP USA DESTINATIONS

California
39.1%

TOP USA ACTIVITIES

Shopping
- 92% Participation

Dining
- 88% Participation

Sightseeing in Cities
- 45% Participation

Water Sports/Sunbathing
- 38% Participation

Visit Small Towns
- 29% Participation

TOP USA PILLARS

- Indulgence
- Culture

USA BARRIERS

- Expensive
- Stubborn people

BOOKING HABITS

BOOKING WINDOW:

- 2mos (Dec-March, Aug, Oct)

•BOOKING METHOD:

- Online: 18%
- Offline: 17%
- Online & Offline: 48%

Where would you travel
(if $ weren't a factor?

South Korea Overview

- The Organization for Economic Cooperation and Development (OECD) predicted that the Korean economy is likely to grow 3.1% in 2013 and 4.4 % the following year. Korea's economic recovery stalled during 2012 due to a slowdown in world trade, but the growth will pick up gradually in the following year
- Total number of Korean overseas travelers in 2012 will reach over 13.5 million, surpassing the all-time record high of 13.3 million set in 2007.
- Korea is the sixth largest overseas market for the US in terms of visitation numbers.
- The number of Korean arrivals to the US showed strong growth of 13.6%, with over 600,000 Koreans traveling to the US in the first half of 2012. The overall travel to the US from Korea is projected to be approximately 1,233,000, up 8% from 2011.
- There are 209 weekly direct flights operated by eight airlines connecting Seoul to 13 gateway cities in the USA.
- American Airlines will launch a direct flight to Dallas in May of 2013

Visitation Trends (Arrivals)

[Thousands of South Korea Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	627	705	758	806	759	744	1,108	1,145	519
Percentage Change (%)	1	13	7	6	-6	-2	49	3	83

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$2,282	$2,608	$2,798	$2,605	$2,738	$2,641	$3,471	$3,797	$1,515
Travel Receipts	$2,218	$2,551	$2,753	$2,515	$2,615	$2,552	$3,377	$3,673	$1,455
Passenger Fare Receipts	$64	$57	$45	$90	$123	$89	$94	$124	$60
Change (%) in Total Exports	4	14	7	-7	5	-4	31	9	66

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	42	44	1.8
Business/Professional	22	25	2.6
Visit Friends/Relatives	21	16	-5.0
Study/Teaching	10	7	-2.4
Net Purposes of Trip			
Leisure & VFR	75	72	-2.8
Business & Convention	30	34	3.9

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	84	89	5.3
Dining in Restaurants	65	61	-3.6
Sightseeing in Cities	37	39	2.4
Cultural Heritage Sites	36	34	-1.8
Water Sports/Sunbathing	15	22	6.9
Amusement/Theme Parks	28	21	-7.4
Cruises	17	20	3.6
Visit National Parks	19	20	0.9
Art Gallery/Museum	16	20	3.3
Guided Tours	14	20	6.0

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 5 of 12)	2010 (Percent)	2011 (Percent)	Point Change (2)
Personal Computer	44	49	5.4
Travel Agency	44	37	-6.1
Airlines Directly	16	14	-1.2
Corporate Travel Dept.	7	11	4.5
Friends/Relatives	16	11	-5.2

Select Traveler Characteristics

Traveler Characteristics	2010	2011	Change (2)
Advance Trip Decision Time (mean days)	57	53	-4.3 days
Advance Trip Decision Time (median days)	30	30	0.0 days
Prepaid Package	19%	24%	4.5 pts.
First International Trip to the US	30%	43%	13.1 pts.
Length of Stay in US (mean nights)	26.1	23.2	-2.9 nights
Length of Stay in US (median nights)	7	7	0 nights
Number of States Visited (% 1 state)	66%	68%	2.1 pts.
Average Number of States Visited	1.5	1.5	0.0 states
Hotel/Motel (% 1+ nights)	79%	80%	0.7 pts.
Average # of Nights in Hotel/Motel	8.9	10.9	2.0 nights
Travel Party Size (mean # of persons)	1.6	1.7	0.1
Gender: % Male (among adults)	54%	62%	7.6 pts.
Household Income (mean average)	$87,800	$84,300	-$3,500
Household Income (median average)	$79,000	$76,300	-$2,700
Average Age: Female	36	38	1.6 years
Average Age: Male	39	39	-0.3 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Taxi/Cab/Limousine	34	37	3.4
Rented Auto	26	29	3.1
City Subway/Tram/Bus	25	27	2.2
Airlines in US	31	26	-5.0
Company or Private Auto	35	26	-9.5

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Pacific	41.8	463	**	**
STATES				
California	39.1	433	**	**

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

(**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: http://tinet.ita.doc.gov/research/programs/ifs/index.html.

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

CONSUMER AND TRADE ACTIVITY TO DATE

- **Hana Tour Travel Fair**
  - Showcased Brand USA in Hana Tour Travel Fair which is organized by the largest wholesale agent in Korea responsible for 25% of the market share. The show attracted 70,000 visitors.
- **50 States in 50 Days**
  - Partnered with the US Embassy and US DMOs to conduct "50 States 50 Days" to promote the culinary them travel to the USA.

PLANNED CONSUMER AND TRADE ACTIVITY

- **Consumer Campaign** runs from June to August 2013.
- **Co-op with United Airlines**
  - Secured 35 air tickets from United Airlines to conduct campaigns to position USA as a premier travel destination.
  - World Baseball Classic Consumer Event
  - Utilizing Brand USA – World Baseball Classic partnership, work with Major League Baseball Korea to host a consumer sweepstake event to promote USA.
- **US promotion with Hana Tour**
  - Negotiate with Hana Tour, the largest travel agent in Korea, to co-invest in conducting large scale co-op that includes Brand USA advertisement, online event, sales incentives promotion and destination seminars, all in partnership with key US DMOs and suppliers.

Market Profile: GERMANY

USA TRAVEL

% AMERICA FANS = 36%

TOP USA DESTINATIONS

New York State
31.3%

California
23.3%

Florida
21.5%

TOP USA ACTIVITIES

Dining
- 85% Participation

Shopping
- 84% Participation

Visit Historical Places
- 48% Participation

Cultural Heritage Sites
- 42% Participation

Touring Countryside
- 38% Participation

TOP USA PILLARS

- Culture
- Great Outdoors

USA BARRIERS

- Arrogant, stubborn, and flamboyant

BOOKING HABITS

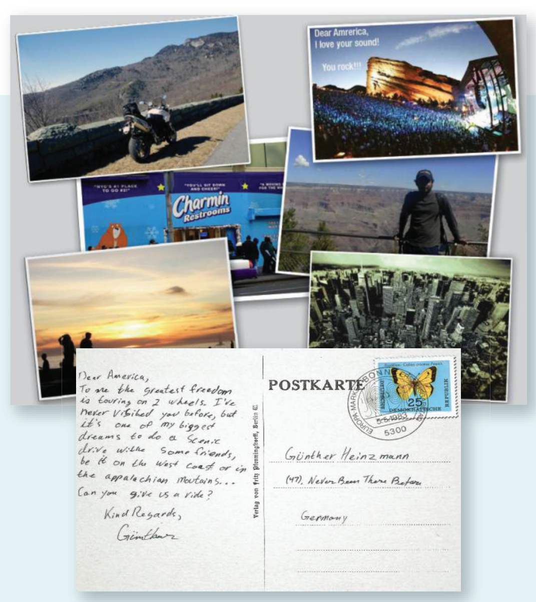
BOOKING WINDOW:

- 3-4mos (Summer Jun-Sept)

BOOKING METHOD:

- Online: 34%
- Offline: 12%
- Online & Offline: 29%

Where would you travel
(if $ weren't a factor?



Germany Overview

- According to Reiseanalyse survey, 53% of Germans say they can afford to take a holiday this year and 59% say they will have the time to go away. About 24% want to travel more than last year and 28% will spend more, while only 17% will travel less and 18% will spend less.
- Increase to outbound travel – strong German travel numbers to the US: Statistics of US DOC published in November highlight that German arrivals to the US in the first half of 2012 were Europe's highest compared to the same period in 2011. Germany can record the strongest growth rate with 8%.
- Germany is world travel champion regarding tourism spending within one year. On average, Germans travel 12.4 days a year for approximately $1,308 USD.
- German inbound travel to the US is expected to grow by 36% from 2010 to 2016.
- Development of German travel agencies: In the past 10 years, the number of travel agencies decreased from 14,000 to about 10,000. Despite this, the total revenue increased with less travel agencies, to 22.4 billion (Euro). The reason is that quality travelers would rather book with travel agencies than on the internet (Source: FVW Travel Market Germany; DRV Vertriebsdatenbank 2011).
- 86% of Germans plan to spend their holidays abroad (Source: FVW Travel Market Germany; Flash Eurobarometer 2012. Survey on the attitudes of Europeans towards tourism, July 2012. EU Commission).

Visitation Trends (Arrivals)

[Thousands of Germany Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	1,320	1,416	1,386	1,524	1,782	1,687	1,726	1,824	504
Percentage Change (%)	12	7	-2	10	17	-5	2	6	38

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$4,687	$4,892	$4,205	$5,156	$6,683	$5,572	$5,647	$6,338	$1,651
Travel Receipts	$3,698	$3,845	$3,204	$4,055	$5,183	$4,479	$4,425	$4,905	$1,207
Passenger Fare Receipts	$989	$1,047	$1,001	$1,101	$1,500	$1,093	$1,222	$1,433	$444
Change (%) in Total Exports	23	4	-14	23	30	-17	1	12	35

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	51	51	-0.3
Visit Friends/Relatives	22	24	2.0
Business/Professional	19	18	-1.0
Convention/Conference	5	4	-1.0
Net Purposes of Trip			
Leisure & VFR	81	82	1.3
Business & Convention	26	23	-2.4

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Dining in Restaurants	85	84	-0.4
Shopping	84	83	-1.0
Visit Historical Places	48	50	2.9
Cultural Heritage Sites	42	44	2.0
Sightseeing in Cities	38	41	3.1
Touring Countryside	38	38	0.0
Visit National Parks	31	33	1.5
Visit Small Towns	34	32	-1.9
Art Gallery/Museum	25	27	1.7
Water Sports/Sunbathing	24	27	2.5

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Personal Computer	51	52	0.7
Airlines Directly	29	30	1.0
Travel Agency	23	25	1.8
State/City Travel Ofc.	20	18	-2.3

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	112	115	3.3 days
Advance Trip Decision Time (median days)	90	90	0.0 days
Prepaid Package	10%	9%	-0.9 pts.
First International Trip to the US	27%	28%	0.8 pts.
Length of Stay in US (mean nights)	18.2	19.6	1.4 nights
Length of Stay in US (median nights)	12	12	0 nights
Number of States Visited (% 1 state)	58%	61%	2.6 pts.
Average Number of States Visited	1.8	1.7	-0.1 states
Hotel/Motel (% 1+ nights)	77%	77%	0.2 pts.
Average # of Nights in Hotel/Motel	8.3	9.3	1.0 nights
Travel Party Size (mean # of persons)	1.4	1.5	0.1
Gender: % Male (among adults)	58%	57%	-1.2 pts.
Household Income (mean average)	$99,300	$99,900	$600
Household Income (median average)	$87,400	$89,100	$1,700
Average Age: Female	39	39	-0.5 years
Average Age: Male	43	44	0.7 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Rented Auto	41	42	0.7
Taxi/Cab/Limousine	30	30	0.0
City Subway/Tram/Bus	27	28	1.1
Company or Private Auto	27	24	-3.2
Airlines in US	26	21	-4.2

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Middle Atlantic	35.7	616	38.1	695
South Atlantic	35.2	608	32.8	598
Pacific	25.7	444	25.3	461
Mountain	**	**	18.0	328
STATES				
New York	31.3	540	33.3	607
California	23.4	404	23.0	419
Florida	21.5	371	18.9	345
CITIES				
New York City-WP-Wayne	30.6	528	32.2	587

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

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For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

CONSUMER AND TRADE ACTIVITY TO DATE

- In-kind value through contributed advertisement from trade of $2.5 million USD (high visibility in travel catalogues, websites, travel channels, display windows)
- Participation at Visit USA Germany travel trade event as premium partner with preferred logo communication (2-day event with 150 travel agents from Germany)
- General partner of “Fit for USA” e-learning program for travel agents with 2,800 registered participants (launched by leading tourism media publisher FVW)

PLANNED CONSUMER AND TRADE ACTIVITY

- **Consumer Campaign** runs from June to August 2013.
- **ITB Berlin** – Organization of Brand USA Block Party, host of media breakfast, host of Brand USA VIP lunch with key accounts
- Participation at three German tourism shows (Stuttgart, Hamburg, Munich) with completely branded USA exhibition floor space
- Participation at Visit USA Switzerland travel trade event (event with 400 travel agents from Switzerland)
- Further marketing activities are suggested in the marketing plan for 2013 (submitted 12/13/2012)

Market Profile: AUSTRALIA

USA TRAVEL

% AMERICA FANS = 36%

TOP USA DESTINATIONS

California 55.4%	**New York State** 53.4%

TOP USA ACTIVITIES

Shopping
- 92% Participation

Dining
- 90% Participation

Sightseeing in Cities
- 75% Participation

Visit Historical Places
- 69% Participation

Art Gallery/Museum
- 51% Participation

TOP USA PILLARS

- Culture
- Urban Excitement
- Indulgence
- Note: Australians participate at high rates in almost all activities. Very active when traveling.

USA BARRIERS

- Distance

BOOKING HABITS

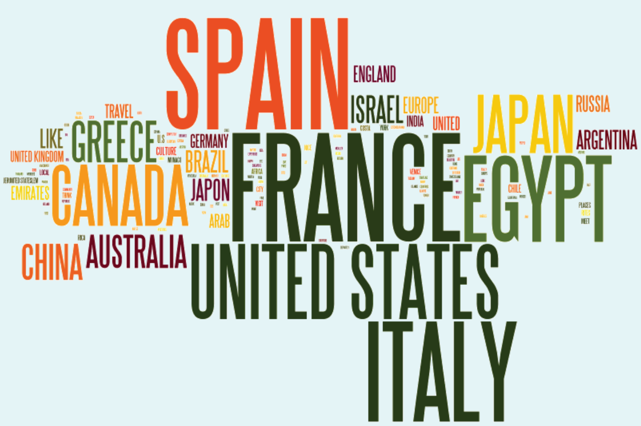
BOOKING WINDOW:

- 4mos (Jan, May, Dec)

•BOOKING METHOD:

- Online: 35%
- Offline: 10%
- Online & Offline: 19%

Where would you travel (if $ weren't a factor?



Visitation Trends (Arrivals)

[Thousands of Australia Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	520	582	603	670	690	724	904	1,038	518
Percentage Change (%)	28	12	4	11	3	5	25	15	100

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011[r]	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$2,554	$2,808	$3,054	$3,336	$3,733	$3,423	$4,052	$4,963	$2,409
Travel Receipts	$2,074	$2,267	$2,505	$2,737	$3,077	$2,974	$3,560	$4,252	$2,178
Passenger Fare Receipts	$480	$541	$549	$599	$656	$449	$492	$711	$231
Change (%) in Total Exports	41	10	9	9	12	-8	18	22	94

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Leisure/Rec./Holidays	61	67	5.3
Visit Friends/Relatives	20	19	-1.2
Business/Professional	11	8	-2.8
Convention/Conference	4	4	-0.6
Net Purposes of Trip			
Leisure & VFR	91	92	1.4
Business & Convention	19	16	-3.0

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 11 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	92	93	1.6
Dining in Restaurants	90	93	3.3
Sightseeing in Cities	75	67	-8.1
Visit Historical Places	69	61	-7.4
Guided Tours	40	41	1.8
Amusement/Theme Parks	39	41	1.6
Touring Countryside	38	37	-0.6
Visit Small Towns	40	37	-3.0
Cultural Heritage Sites	42	35	-7.2
Visit National Parks	35	32	-2.5
Art Gallery/Museum	51	32	-19.3

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Travel Agency	54	56	1.2
Personal Computer	47	50	3.2
Airlines Directly	22	21	-0.5
Friends/Relatives	20	19	-0.6

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	136	148	12.2 days
Advance Trip Decision Time (median days)	110	120	10.0 days
Prepaid Package	13%	11%	-2.7 pts.
First International Trip to the US	37%	41%	3.5 pts.
Length of Stay in US (mean nights)	24.8	21.2	-3.6 nights
Length of Stay in US (median nights)	18	15	-3 nights
Number of States Visited (% 1 state)	33%	39%	5.7 pts.
Average Number of States Visited	2.5	2.3	-0.2 states
Hotel/Motel (% 1+ nights)	86%	88%	1.7 pts.
Average # of Nights in Hotel/Motel	13.3	13.5	0.2 nights
Travel Party Size (mean # of persons)	1.6	1.7	0.1
Gender: % Male (among adults)	56%	54%	-1.2 pts.
Household Income (mean average)	$104,300	$117,600	$13,300
Household Income (median average)	$95,100	$113,100	$18,000
Average Age: Female	42	42	-0.4 years
Average Age: Male	44	43	-0.9 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Taxi/Cab/Limousine	58	62	4.7
Airlines in US	51	53	2.6
City Subway/Tram/Bus	37	35	-2.1
Rented Auto	32	25	-7.0
Company or Private Auto	20	23	2.9

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Pacific	58.5	529	56.9	591
Middle Atlantic	55.0	497	41.4	430
Pacific Islands	**	**	26.6	276
STATES				
California New York	55.4	501	54.3	564
New York	53.4	483	40.1	416
Hawaiian Islands	**	**	26.4	274
CITIES				
New York City-WP-Wayne	53.0	479	39.9	414
Honolulu	**	**	18.0	187

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

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Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

Market Profile: CHINA

USA TRAVEL

% AMERICA FANS = 63%

TOP USA DESTINATIONS

California captured 49.2% of inbound travelers*

TOP USA ACTIVITIES

Shopping
- 94% Participation

Dining
- 83% Participation

Sightseeing in Cities
- 48% Participation

Visit Historical Places
- 45% Participation

Amusement/Theme Parks
- 33% Participation

TOP USA PILLARS

- Indulgence
- Culture
- Known "greatest hits" traveler

USA BARRIERS

- Expensive

BOOKING HABITS

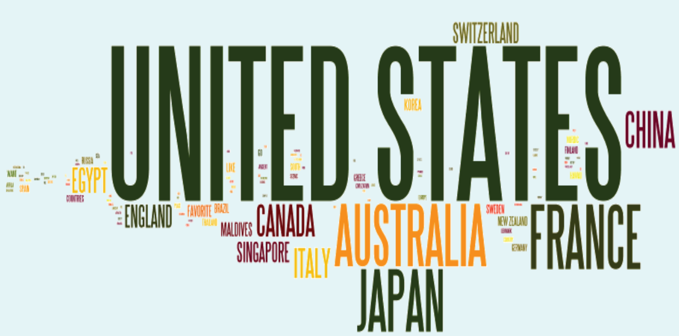
BOOKING WINDOW:

- 2mos (Jan-Feb, May, Oct)

•BOOKING METHOD:

- Online: 10%
- Offline: 29%
- Online & Offline: 52%

Where would you travel (if $ weren't a factor?



China Overview

According to a report from January 23, 2013 by the Department of Commerce, bookings from China are forecast to be strong through the first half of 2013

- The report, entitled the "China Travel Barometer," cites the results of a survey of tour operators conducted from December 10, 2012 through January 10, 2013, with 77 percent of those surveyed projecting an increase in travel booked from China to the United States in the first quarter of the year as compared to the same period last year, and 73 percent projecting higher bookings for the second quarter vs. the same period last year.

- The same survey cited the top motivators and deterrents to travel from China to the United States over the next six months as follows:

MOTIVATORS	DETERRENTS
Visa processing time	Natural disasters
Level of promotion by US destinations and businesses	
Direct air service to desired locations	

Visitation Trends (Arrivals)

[Thousands of China Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	203	270	320	397	493	525	802	1,089	887
Percentage Change (%)	29	33	19	24	24	6	53	36	438

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$1,115	$1,534	$2,071	$2,699	$3,614	$3,602	$5,283	$7,740	$6,625
Travel Receipts	$894	$1,181	$1,642	$2,081	$2,717	$2,755	$3,976	$5,689	$4,795
Passenger Fare Receipts	$221	$353	$429	$618	$897	$847	$1,307	$2,051	$1,830
Change (%) in Total Exports	30	38	35	30	34	0	47	47	594

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Business/Professional	42	30	-12.7
Leisure/Rec./Holidays	16	27	11.4
Visit Friends/Relatives	25	24	-1.2
Study/Teaching	11	14	2.9
Net Purposes of Trip			
Leisure & VFR	63	72	9.0
Business & Convention	49	37	-12.0

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 10 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	94	87	-6.8
Dining in Restaurants	83	78	-5.9
Sightseeing in Cities	48	54	6.8
Visit Historical Places	45	53	7.6
Amusement/Theme Parks	33	36	2.6
Visit National Parks	24	29	5.2
Cultural Heritage Sites	23	28	5.4
Art Gallery/Museum	19	25	6.0
Casinos/Gambling	19	24	5.0
Visit Small Towns	23	23	-0.1

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Personal Computer	32	35	2.5
Travel Agency	30	29	-0.1
Airlines Directly	27	25	-1.9
Friends/Relatives	13	15	1.8

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	59	65	6.3 days
Advance Trip Decision Time (median days)	35	40	5.0 days
Prepaid Package	14%	19%	4.8 pts.
First International Trip to the US	40%	55%	14.7 pts.
Length of Stay in US (mean nights)	32.8	38.2	5.4 nights
Length of Stay in US (median nights)	13	11	-2 nights
Number of States Visited (% 1 state)	50%	48%	-2.3 pts.
Average Number of States Visited	2.0	2.0	0.0 states
Hotel/Motel (% 1+ nights)	74%	76%	2.3 pts.
Average # of Nights in Hotel/Motel	13.6	9.5	-4.1 nights
Travel Party Size (mean # of persons)	1.5	1.6	0.1
Gender: % Male (among adults)	77%	62%	-14.4 pts.
Household Income (mean average)	$67,400	$61,200	-$6,200
Household Income (median average)	$44,100	$41,600	-$2,500
Average Age: Female	36	35	-1.2 years
Average Age: Male	39	37	-2.3 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Airlines in US	46	47	0.9
Taxi/Cab/Limousine	36	37	1.4
Company or Private Auto	34	34	0.0
Rented Auto	25	32	7.1
City Subway/Tram/Bus	23	22	-0.6

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Pacific	52.4	420	47.6	519
Middle Atlantic	**	**	46.4	505
STATES				
New York	**	**	43.7	476
California	49.2	394	43.2	471
CITIES				
New York City-WP-Wayne	**	**	39.0	425
Los Angeles	**	**	31.1	339

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

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(**) Estimate not shown due to sample size fewer than 400 for this year.

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For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

Market Profile: INDIA

USA TRAVEL

% AMERICA FANS = 48%

TOP USA DESTINATIONS

New York and Mid-Atlantic states

TOP USA ACTIVITIES

Shopping
- 85% Participation

Dining
- 78% Participation

Sightseeing in Cities
- 44% Participation

Visit Historical Places
- 38% Participation

Amusement/Theme Parks
- 30% Participation

TOP USA PILLARS

- Indulgence
- Culture
- Known "greatest hits" traveler

•USA BARRIERS

- Arrogant
- Expensive

BOOKING HABITS

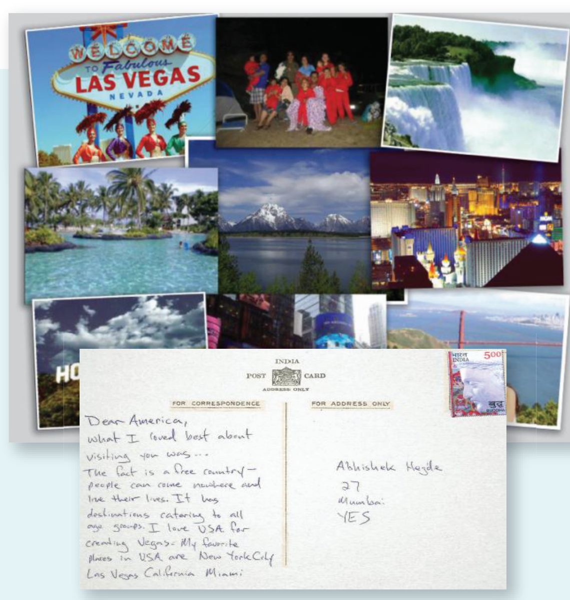
BOOKING WINDOW:

- 1.5mos (Feb, Apr-June, Oct-Dec)

•BOOKING METHOD:

- Online: 8%
- Offline: 25%
- Online & Offline: 10%

Where would you travel
(if $ weren't a factor?



Visitation Trends (Arrivals)

[Thousands of India Visitors]	2004	2005	2006	2007	2008	2009	2010	2011	Change 2011/ 2004
Total Arrivals	309	345	407	567	599	549	651	663	355
Percentage Change (%)	13	12	18	39	6	-8	18	2	115

Spending Trends (Exports)

[Millions of US Dollars]	2004	2005	2006	2007	2008	2009	2010	2011r	Change 2011/ 2004
Total Travel & Tourism Exports (1)	$1,391	$1,617	$2,558	$3,702	$4,289	$3,565	$4,028	$4,418	$3,027
Travel Receipts	$1,367	$1,519	$1,865	$2,649	$3,028	$2,577	$2,877	$3,079	$1,712
Passenger Fare Receipts	$24	$98	$693	$1,053	$1,261	$988	$1,151	$1,339	$1,315
Change (%) in Total Exports	15	16	58	45	16	-17	13	10	218

(r) Revised

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2010 (Percent)	2011 (Percent)	Point Change (2)
Business/Professional	49	50	0.3
Visit Friends/Relatives	33	31	-1.3
Leisure/Rec./Holidays	7	7	0.0
Convention/Conference	6	7	0.1
Net Purposes of Trip			
Leisure & VFR	51	50	-0.7
Business & Convention	57	57	-0.5

Activity Participation While in the United States

Activity Participation While in the US (multiple response: top 11 of 25)	2010 (Percent)	2011 (Percent)	Point Change (2)
Shopping	85	86	1.1
Dining in Restaurants	78	76	-2.4
Sightseeing in Cities	44	40	-4.5
Visit Historical Places	38	37	-0.1
Amusement/Theme Parks	30	31	0.6
Touring Countryside	17	18	1.4
Art Gallery/Museum	14	17	2.5
Visit National Parks	20	16	-4.4
Visit Small Towns	15	16	0.9
Nightclubs/Dancing	15	13	-1.9
Cultural Heritage Sites	13	13	0.0

Information Sources Used for Trip Planning

Information Sources Used (multiple sources: top 4 of 12)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Travel Agency	43	43	0.1
Corporate Travel Dept.	23	24	1.0
Personal Computer	23	23	-0.3
Airlines Directly	14	13	-1.5

Select Traveler Characteristics

Traveler Characteristics	**2010**	**2011**	**Change** (2)
Advance Trip Decision Time (mean days)	48	48	-0.9 days
Advance Trip Decision Time (median days)	30	30	0.0 days
Prepaid Package	3%	3%	0.2 pts.
First International Trip to the US	32%	37%	5.3 pts.
Length of Stay in US (mean nights)	42.7	45.9	3.2 nights
Length of Stay in US (median nights)	21	21	0 nights
Number of States Visited (% 1 state)	55%	57%	2.2 pts.
Average Number of States Visited	1.8	1.8	0.0 states
Hotel/Motel (% 1+ nights)	76%	75%	-1.1 pts.
Average # of Nights in Hotel/Motel	16.8	16.7	-0.1 nights
Travel Party Size (mean # of persons)	1.2	1.2	0.0
Gender: % Male (among adults)	78%	75%	-3.5 pts.
Household Income (mean average)	$55,800	$61,900	$6,100
Household Income (median average)	$43,600	$44,400	$800
Average Age: Female	44	40	-3.8 years
Average Age: Male	42	43	1.1 years

Transportation Used in the United States

Transportation Types Used in United States (multiple response: top 5 of 8)	**2010 (Percent)**	**2011 (Percent)**	**Point Change** (2)
Taxi/Cab/Limousine	59	58	-1.2
Airlines in US	35	35	-0.3
Railroad between Cities	15	16	1.0
Rented Auto	17	16	-1.4
Company or Private Auto	14	15	1.4

US Destinations Visited (States, Cities, and Regions)

Visitation to US Destinations/Regions (3)	Market Share 2010 (Percent)	Volume 2010 (000)	Market Share 2011 (Percent)	Volume 2011 (000)
REGIONS				
Middle Atlantic	**	**	43.1	286
STATES				
New York	**	**	3308	224
CITIES				
New York City-WP-Wayne	**	**	30.2	200

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to US air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

(**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: http://tinet.ita.doc.gov/research/programs/ifs/index.html.

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html.

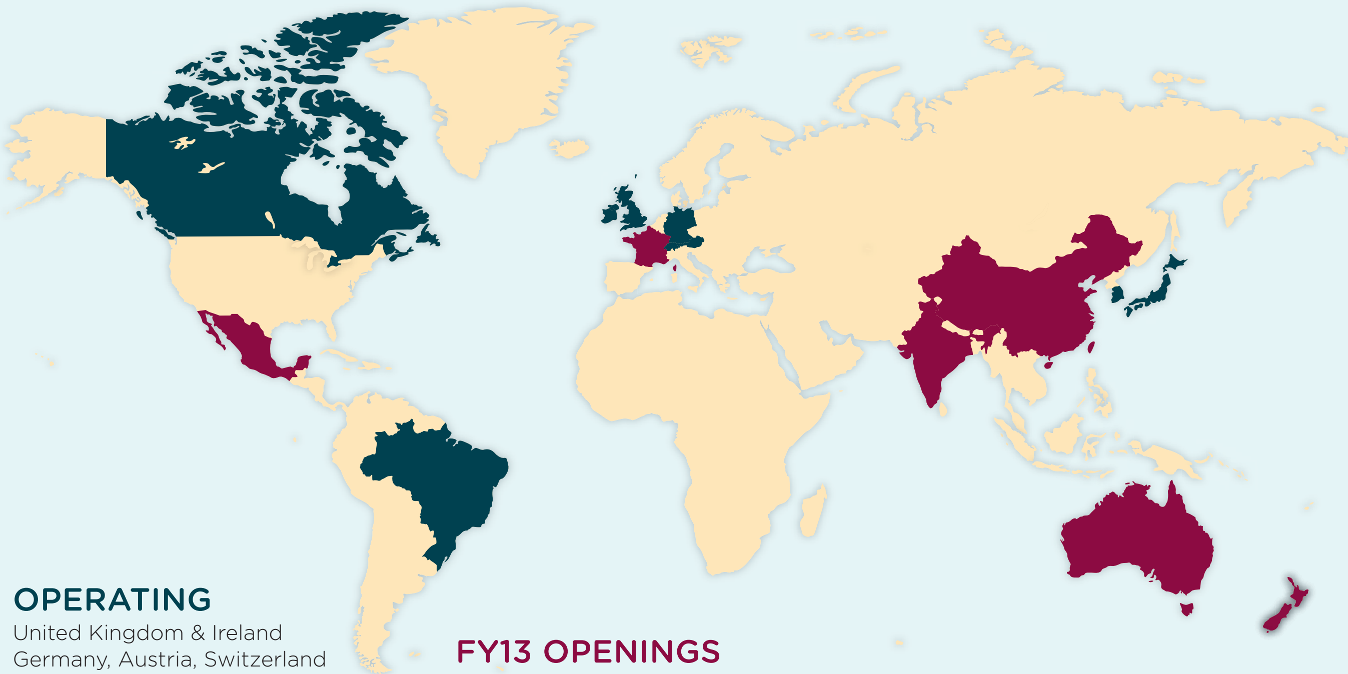
Source: US Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

Publication Date: May 2012

International Representation Firms

To fulfill marketing objectives in key countries, Brand USA plans to establish representative offices in 18 international regions covering over 40 countries. Travel from these countries makes up 93 percent of inbound traffic to the United States.

REPRESENTATION FIRM ROLLOUT PLAN



OPERATING

United Kingdom & Ireland
Germany, Austria, Switzerland
Japan
Korea
Brazil*
Canada*

* Trade Only

FY13 OPENINGS

China (PRC) – Feb 2013
Hong Kong – Feb 2013
Taiwan – Feb 2013
India – Mar 2013

Australia and New Zealand – Apr 2013
Brazil*/S America – May 2013

Mexico – May 2013
France – June 2013
Canada* – June 2013

* Marketing/PR

GERMANY, AUSTRIA, AND SWITZERLAND BRANDMASTERS AMERICA

Opened: March 2012

Brandmasters is operated by a consortium of four leading agencies (GIA Get It Across Marketing & PR in Cologne, Germany; MSI-Marketing Services International in Frankfurt, Germany; Travel Marketing Romberg in Dusseldorf; and Wiechmann Tourism Service GmbH in Frankfurt).

THE UNITED KINGDOM AND IRELAND BLACK DIAMOND

Opened: March 2012

Black Diamond is an experienced marketing organization that has represented 25 United States destinations. Comprised of numerous divisions, including travel, television and research, the London-based company provides trade, marketing, communications, technology, creative, media planning and brand strategy services.

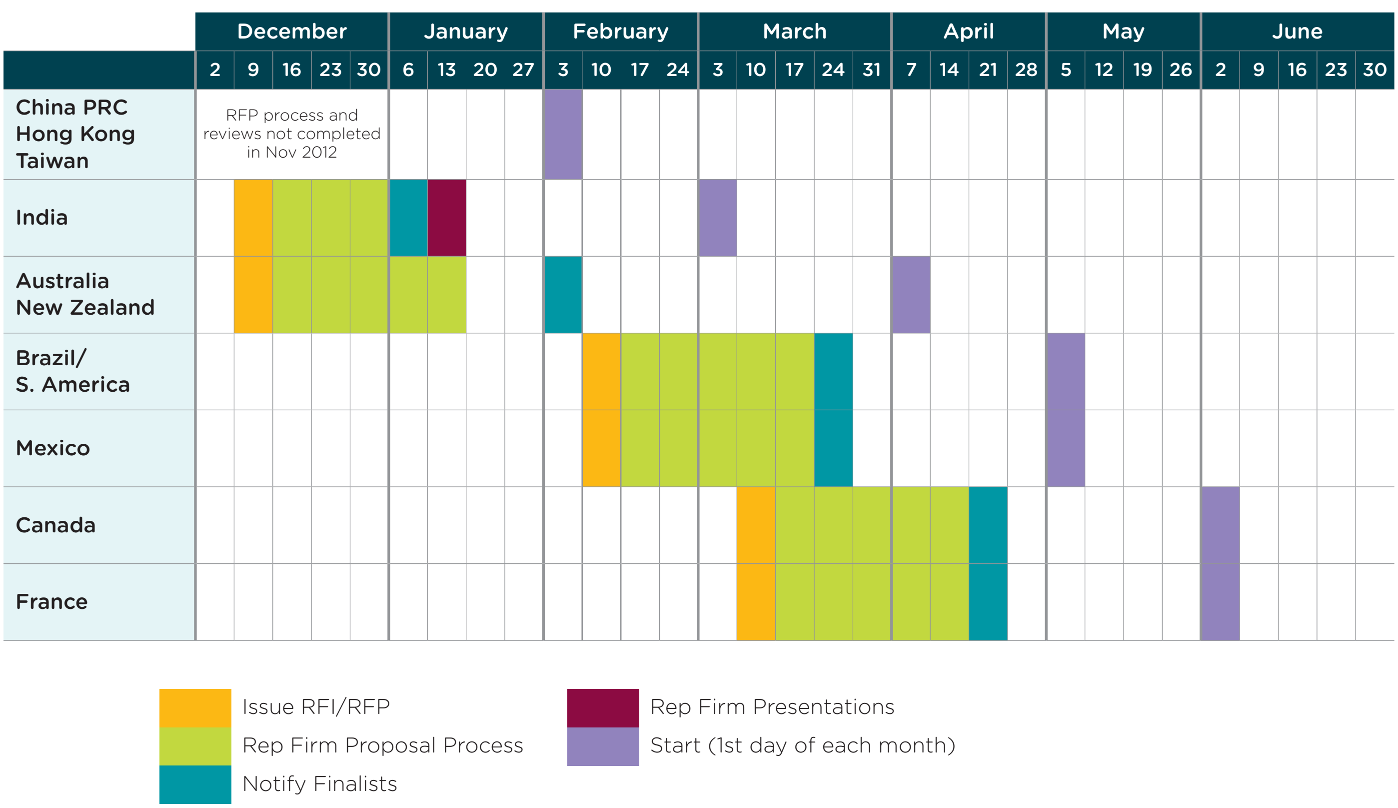
JAPAN AND SOUTH KOREA AVIAREPS MARKETING GARDEN LTD

Opened: April 2012

Tokyo-based AVIAREPS is a destination marketing company specializing in outbound travel. The largest company of its kind in Asia-Pacific, it has seven additional offices in the region.

During FY13, Brand USA is scheduled to open additional offices as follows:

- China PRC, Hong Kong, Taiwan, and India in March
- Australia and New Zealand in April
- Brazil and Mexico in May
- France and Canada in June



Tradeshows and Events

During 2012, Brand USA hosted USA Pavilions at international tradeshows in 12 countries (Argentina, Brazil, China, France, Italy, India, Japan, Mexico, Singapore, Spain, Sweden, and the United Kingdom).

With the strong umbrella branding and a unified USA presence, we were able to expand the United States' presence and effectiveness at these shows.

A a result, US-exhibitor participation increased significantly.

EVENT	CITY/COUNTRY	DATES	TRADE/ CONSUMER	NUMBER OF VISITORS
SATTE	New Delhi, India	January 16-18, 2013	T	T: 6,249 (2012)
FITUR	Madrid, Spain	January 30-February 3, 2013	T&C	T: 63,628 + C: 91,555 = 155,183 (2012)
BIT	Milan, Italy	February 14-17, 2013	T&C	T: 54,600 + C: 35,200 = 89,800 (2012)
ITB Berlin	Berlin, Germany	March 6-10, 2013	T&C	T: 113,006 + C: 59,126 = 172,132 (2012)
MITT	Moscow, Russia	March 20-23, 2013	T&C	T+C: 82,933 (2012)
TUR	Gothenburg, Sweden	March 21-24, 2013	T&C	T: 13,076 + C: 23,024 = 36,100 (2012)
WTM Latin America	São Paulo, Brazil	April 23-25, 2013	T	New show
ATM	Dubai, United Arab Emirates	May 6-9, 2013	T	T: 17,575 (2012)
IMEX	Frankfurt, Germany	May 21-23, 2013	T	T: 8,782 (2012)
HITS	Seoul, South Korea	May 24-26, 2013	T&C	T+C: 45,500 (2011)
IPW	Las Vegas, NV	June 8-12, 2013	T	T: 3,000
BITE	Beijing, China	June 21-23, 2013	T&C	T+C: 42,763 (2011)
ABAV	São Paulo, Brazil	September 4-8, 2013	T&C	T: 23,712 (2011)
JATA	Tokyo, Japan	September 12-15, 2013	T&C	T+C: 125,989 (2011)
IFTM Top Resa	Paris, France	September 24-27, 2013	T	T: 28,788 (2012)
FITA	Mexico City, Mexico	September 26-29, 2013	T&C	T+C: 60,000 (2012)
TTG Incontri	Rimini, Italy	October 17-19, 2013	T	T: 48,735 (2011)
Taipei ITF	Taipei, Taiwan	October 18-21, 2013	T&C	T: 18,581 + C: 232,650 = 251,231 (2011)
ITB Asia	Singapore	October 23-25, 2013	T	T: 8,500 (2012)
FIT	Buenos Aires, Argentina	November 2-5, 2013	T&C	T: 33,249 + C: 58,239 = 91,488 (2011)
WTM	London, United Kingdom	November 4-7, 2013	T	T: 47,776 (2011)
EIBTM	Barcelona, Spain	November 19-21, 2013	T	T: 9,330 (2011)

Subject to change without notice.

Tradeshow Descriptions

SATTE

Date: January 16-18, 2013
Location: New Delhi, India
Type of Show: Business-to-Business Trade Show

Background: South East Asia's leading Business-to-Business trade show. SATTE 2012 had travel and tourism presence from 33 countries, 23 states and 6,249 buyers and sellers. SATTE is India's first and biggest tourism event.

FITUR

Date: January 30 – February 3, 2013
Location: Madrid, Spain
Type of Show: Business-to-Business and Consumer Show

Background: FITUR is a global meeting point for tourism professionals and the leading trade fair for inbound and outbound Ibero-American markets. FITUR 2012 confirmed the trend towards recovery in the travel and tourism industry- with 9,506 exhibiting companies from 167 countries, 119,322 trade participants and 91,555 people from the general public. Additionally, 6,313 journalists from 54 countries participated at the show.

BIT

Date: February 14 – 17, 2013
Location: Milan, Italy
Type of Show: Business-to-Business and Consumer Show

Background: A global meeting place, targeting the Italian market, BIT 2012 reached success by hosting 2,000 exhibitors from 120 countries. 60,000 trade professional and 90,000 consumers attended BIT, together with 3,500 journalists.

VITRINA TURISTICA ANATO

Date: February 27 – March 1, 2013
Location: Bogota, Colombia
Type of Show: Business-to-Business

Background: A tourism trade fair, catered toward Columbian and international professionals in the tourism industry. Vitrina Turistica 2012 had 30,734 participants, 9,571 exhibitors, and 473 registered journalists.

Show: MITT
Date: March 6 – 10, 2013
Location: Moscow, Russia
Type of Show: Business-to-Business

Background: Celebrating its 20th year in existence in 2013, MITT is the largest travel show in Russia and Eastern Europe. 82,933 attendees from 197 countries to Moscow attended MITT in 2012.

TUR

Date: March 21 – 24, 2013
Location: Gothenburg, Sweden
Type of Show: Business-to-Business and Consumer Show

Background: TUR celebrates is 30 year anniversary in 2013. TUR 2012 had 36,100 visitors from 79 countries from 79 countries, 703 exhibitors. TUR is Scandinavia's leading trade fair for the travel and tourism industry.

COTTM

Date: April 9-11, 2013
Location: Beijing, China
Type of Show: Business-to-Business Trade show

Background: 100% outbound travel. COTTOM, 2012 had 275 exhibitors from 60 different countries, 4,137 outbound tour operators from overall China. COTTM is China's only B2B trade show focusing purely on outbound travel.

WTM LATIN AMERICA

Date: April 23 – 25, 2013
Location: Sao Paulo, Brazil
Type of Show: Business-to-Business

Background: WTM Latin America is a new B2B show that will debut in April 2013, aiming to e the leading global event from the Latin American travel industry.

ATM

Date: May 6-9, 2013
Location: Dubai, United Arab Emirates
Type of Show: Business to Business focused show

Background: ATM, 2012 exhibitor attendance rose for ATM 2012, with 17,575 trade visitors and 2,436 exhibitors representing 127 different countries. The 19th edition of the show proved that the Middle East region's travel industry is back and stronger than before, and ATM is the best way to reach this market.

IMEX

Date: May 21 – 23, 2013
Location: Frankfurt, Germany
Type of Show: Business-to-Business

Background: IMEX in Frankfurt is a worldwide exhibition for incentive travel, meetings and events. In 2012, 3,500 exhibitors represented from 157 countries. 4,000 hosted buyers attended the event, contributing to a total of around 9,000 visitors.

HITS

Date: May 24-26, 2013
Location: Soul, South Korea
Type of Show: Business-to-Business and Consumer Show

Background: South Korea's largest international travel show, in 2011 the show attracted 45,500 visitors

BITE

Date: June 21-23
Location: Beijing, China
Type of Show: Business-to-Business and Consumer trade show

Background: BITE 2012 had 929 exhibitors, which is an increase of over 150 since 2011. The exhibitors came from 80 countries and regions with 43,314 visitors and 220 buyers.

ABAV

Date: September 4 – 8, 2013
Location: Sao Paulo, Brazil

Background: Annual travel trade show in Brazil, ABAV 2011 had 23,712 trade visitors.

JATA

Date: September 12-15, 2013
Location: Tokyo, Japan
Type of Show: Business-to-Business and Consumer

Background: JATA 2012 had 125,989 participants and 107 companies from 156 countries.

IFTM TOP RESA

Date: September 24 -27, 2013
Location: Paris, France
Type of Show: Business-to-Business

Background: IFTM Top Resa is France's international travel and tourism trade fair. IFTM Top Resa 2012 welcomed 28,788 trade visitors, an increase of 3.7% from 2011

FITA

Location: Mexico City, Mexico
Date: September 26 – 29, 2013
Type of Show: Business-to-Business

Background: FITA brings together professionals from the global tourism industry in Mexico. FITA 2012 has 60,000 participants.

TTG INCONTRI

Location: Rimini, Italy
Date: October 17 – 19, 2013
Type of Show: Business-to-Business

Background: TTG is the main international B2B fair on tourism in Italy. More than 40,000 people attended, and 2,400 companies exhibited at TTG 2012.

TAIPEI ITF

Date: October 18-21, 2013
Location: Taipei, Taiwan
Type of Show: Business-to-Business and Consumer

Background: Over 60 countries continually participate in ITF, the 2012 expo attracted 260,000 visitors and a total of 2,500 media reports on the event. This shows a attendance growth of 4.52%.

ITB ASIA

Date: October 23-25, 2013
Location: Singapore
Type of Show: Business-to-business

Background: ITB Asia 2012 had 8just under 8,500 attendees from 92 countries, 865 exhibitor organizations from 72 countries and more than 750 buyers.

FIT

Location: Buenos Aires, Argentina
Date: November 2 -5, 2013
Type of Show: Business-to-Business and Consumer Show

Background: Annual travel and trade show fair in Argentina, FIT 2012 has 91,488 visitors, 1,793 exhibitors, represented from 46 counties.

WTM

Location: London, UK
Date: November 4 – 7, 2013
Type of Show: Business-to-Business

Background: World Travel Market, the leading global event for the travel industry takes place annually in London. WTM 2012 was attended by 47,776 global travel professionals.

EIBTM

Location: Barcelona, Spain
Date: November 19 – 21, 2013
Type of Show: Business-to-Business

Background: EIBTM is the leading global event for the meetings and events industry, taking place in the award winning business and tourism destination of Barcelona. The event gathers over 15,000 industry professionals for three days of focused access to a dynamic business environment, thought provoking professional education and business networks.

Menu of Partnership Opportunities

We are currently developing a comprehensive guide to the partner opportunities that includes the following program areas:

Publisher / Co-Op Opportunities

- Best Day
- Essentially America
- Expedia
- iTravel2000
- Mountain News
- Odigeo
- Orbitz
- Rakuten
- Travelocity
- Trip Advisor
- Travelzoo
- Google

Media Co-Op Opportunities

Joint Media Planning & Buying:

- Television
- Print
- OOH
- Digital
- Social
- Radio (exploring for key partner "drive" markets)

DiscoverAmerica.com, Content & Turnkey Opportunities

The following programs are offered through Brand USA's affiliation with Miles Media:

- Discover America Destination Inspiration Guide
- Native Creative Content
- International SEM
- Turnkey Media Programs
- DiscoverAmerica.com Sponsorship Opportunities

In March, we will publish this guide with an update to our marketing plan.

In advance of the March 2013 publication of our comprehensive partnership program guide, here is an overview of some of the programs available. The March guide will provide additional details about these and other opportunities and marketing initiatives Brand USA is developing to add and create value for partners.

Publisher Program Co-Op

These programs have been some of the most popular co-op opportunities with our partners due to their ease of activation and ability to measure results.

A variety of publisher platforms are available in targeted international markets—with Brand USA matching the partner's investment in digital display advertising.

Paid Media:

Brand USA matches partner's investment in digital display advertising. Match subject to approval by Brand USA. Certain limits on total advertising spend apply.

PUBLISHERS:

- **Best Day**
  - Mexico
- **Essentially America**
  - UK
  - China
  - Germany
  - Mexico
  - Brazil
- **Expedia**
  - Canada
  - UK
  - Australia
  - Brazil
  - Japan
  - Korea
  - New Zealand
  - Germany
- **iTravel2000**
  - Canada
- **Mountain News**
  - UK
- **Odigeo**
  - Mexico
- **Orbitz**
  - UK
  - Finland
  - Sweden
  - Norway
  - Denmark
  - France
  - Germany
  - Mexico
- **Rakuten**
  - Japan
- **Travelocity**
  - Canada
  - UK
  - Germany
- **Trip Advisor**
  - Canada
  - Australia
  - Brazil
  - Germany
  - UK

ADDITIONAL DIGITAL PARTNERS:

(customized marketing solutions)

- **Google**
- **Travelzoo**

Media Co-op Opportunities

JOINT MEDIA BUYING & PLANNING PROGRAM

This program is designed to extend the reach of partner media buys and coordinate marketing efforts with Brand USA' presence in those same markets

By coordinating our media planning and buying, we can determine the best media mix practices and in-depth market intelligence. Brand USA works with its partners to analyze and ensure the media buy will reach target markets and audiences as intended to deliver optimum GRPs, reach and frequency levels.

Program Outline:

1. Brand USA develops a media brief that includes a proposed media buy, media rates and timing; then recommends to the partner.
2. Brand USA and partner collaborate on a creative execution.
3. Brand USA authorizes the buy and executes with media agency.
4. Brand USA extends the media exposure by investing an additional 30%
5. Brand USA and partner track key metrics and share data and results.

NATIVE CREATIVE CONTENT PROGRAM:

- Destinations create in-language multimedia content (not translated)
- Content lives on DiscoverAmerica.com and can also be syndicated on other platforms
- **Assets:** 2.5-minute in-language video about the destination, 400-500 word native language feature story and 15-20 high quality photos
- **Geographic distribution available:** Australia, Brazil, Canada, China, Germany, Japan, Mexico, UK

BRAND USA INSPIRATION GUIDE:

- Upscale visitor guide that showcases the American experience through stunning photos and brief copy, including featured photo essays from destination sponsors
- Guide will be language-specific and printed for 13 international audiences
- An eBook edition of the guide with actionable links will also be created
- **Print distribution (400,000 copies total):** UK, Ireland, Germany, Austria, Switzerland, Canada, Mexico, Brazil, Japan, South Korea, China, India, Australia

DISCOVERAMERICA.COM EXPOSURE:

Opportunities include sponsorships of home page tiles, state pages and city pages

- Destinations can invest in a dedicated City, State of Experience page on DiscoverAmerica.com
- Baseline package includes 500 words of copy, link to destination's official site, translations and one photo. Add-ons include DiscoverAmerica.com homepage tile, 20-image photo gallery and a video player
- **Geography:** available to all viewers of DiscoverAmerica.com

INTERNATIONAL SEARCH ENGINE MARKETING (SEM):

- Targeted and fully-managed SEM campaigns
- Ads and landing pages created in native languages
- Landing pages can be destination-focused or include co-op promotions for industry partners
- **Geography:** Australia, Brazil, Canada, Germany, Japan, Mexico, UK

TURNKEY MEDIA PROGRAMS:

- Multimedia opportunities for destinations to reach markets through print and digital inserts, online advertising, email marketing and social media
- Six-week program duration, timed to launch during peak travel planning cycles in each country
- **Geography:** available in Canada (East & West), Germany, Mexico, China, Brazil, Japan

Brand USA International Rep. Firms

AVIAREPS: JAPAN AND SOUTH KOREA

AVIAREPS Marketing Garden (Holdings) Ltd.
International Place, 26-3 Sanei-cho
Shinjuku, Tokyo 160-0008 Japan

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INSIGHT MARKETING: BRAZIL (TRADE REP.)

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Board of Directors

Chair of the Board
Caroline Beteta
President & CEO, Visit California
Commission Expires September 2015
Member: Finance Committee

Vice Chair, Operations
Daniel Halpern
President & CEO, Jackmont Hospitality, Inc.
Commission Expires September 2014
Chair: Governance & Nominating Committee
Member: Finance Committee

Vice Chair, Marketing
David Lim
Chief Marketing Officer, Amtrak
Commission Expires September 2013
Chair: Marketing Committee
Member: Finance Committee

Treasurer
Arne Sorenson
President & CEO
Marriott International, Inc.
Commission Expires September 2015
Chair: Finance Committee

Secretary
Diane Shober
State Tourism Director
Wyoming Office of Tourism
Commission Expires September 2014
Member: Finance Committee
Member: Marketing Committee

George Fertitta
CEO
NYC & Company
Commission Expires September 2015
Member: Marketing Committee

Randy Garfield
President, Disney Travel Company
EVP, Worldwide Sales & Travel Operations,
Disney Destinations
Commission Expires September 2014
Member: Marketing Committee

Tom Klein
President
Sabre Holdings
Commission Expires September 2014
Chair: Audit Committee
Member: Governance & Nominating Committee

Mark Schwab
CEO
Star Alliance Services GmbH
Commission Expires September 2015
Member: Audit Committee

Chef Roy Yamaguchi
Owner & Founder
Roy's Restaurant
Commission Expires September 2015
Member: Audit Committee

Lynda Zengerle, Esq.
Partner, Steptoe and Johnson LLP
Commission Expires September 2013
Member: Governance & Nominating Committee

Key Contact Information

Our Social Media Channels

To follow our progress and announcements of new initiatives, please connect with us on these social media channels.

Travel Industry Information

@BrandUSA on Twitter

Consumer Information

@DiscoverAmerica on Twitter

Facebook.com/DiscoverAmerica

Our Websites

For industry or partner information about Brand USA, please visit www.TheBrandUSA.com.

For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at www.DiscoverAmerica.com.

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