



Brand USA Summer Board Meeting Public Session

Brand USA

Chair Open



AGENDA

- **Chair Remarks**
 - Vote: Approve March 22, 2024 Meeting Minutes
 - **CEO Report**
 - **FY25–FY27 Framework**
 - **FY25 Business Plan and Budget Discussion**
 - Global Travel and Tourism Landscape
 - Objectives
 - Marketing Plan
 - Summary Budget
 - **Vote: Approval of the FY25 Business Plan and Budget**
 - **Vote: Board Committees**
 - **Current Year Report**
 - FY24 YTD Financials
 - FY24 Metrics Dashboard
 - Launch of Partner Success Portal
 - Consumer Campaign Updates
 - Content / Go USA TV
 - Recent Industry Platforms
 - Trade Activity
 - Travel Week U.K. and Europe Preview
-

CHAIR OPEN

- Call Meeting to Order
- Welcome Fred Dixon as President and CEO
- Vote: March 22, 2024 Meeting Minutes



Brand

USA

CEO Report

CEO REPORT

- First 100 Days
- FY25 Business Plan Overview

FY25-

FY27

Framework



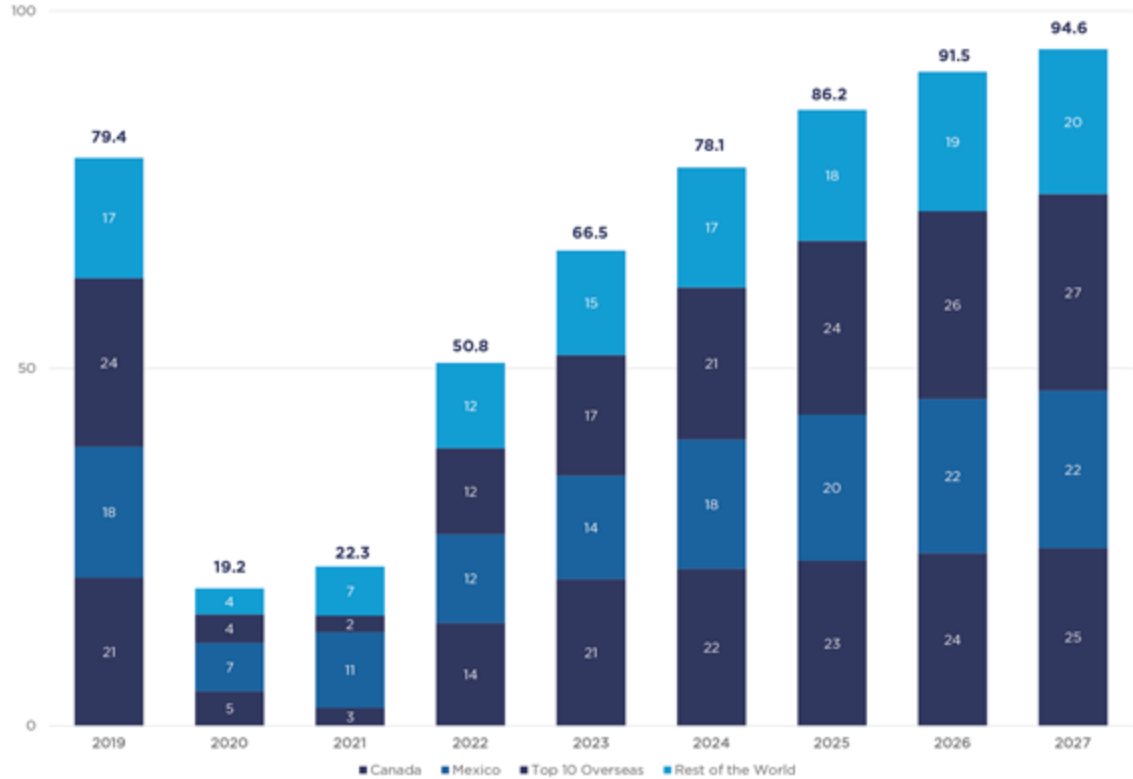
Brand USA

Three-Year Outlook



Visitation Goal: Expected to Surpass it by 2026

U.S. INBOUND TRAVEL (IN MILLIONS)



Note: The top 10 overseas markets are based on actual visitation data from 2023 and include the U.K., Germany, India, Brazil, South Korea, France, Japan, China, Italy, and Australia.

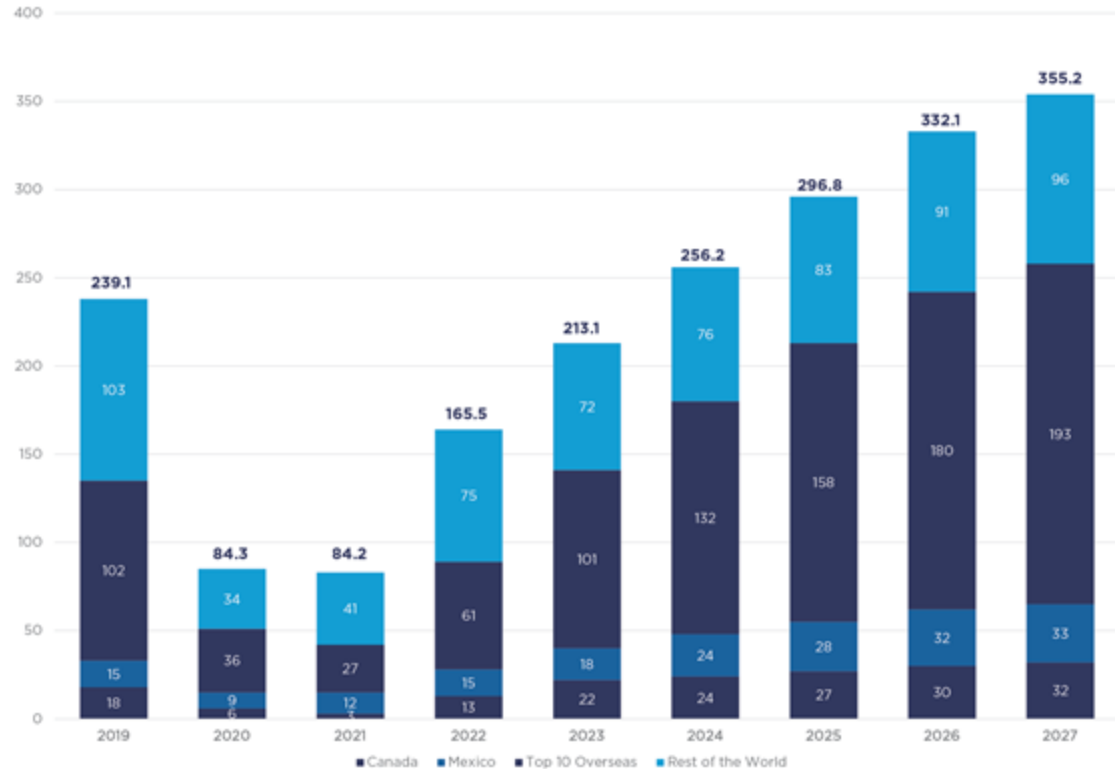
PATH TO 2027 VISITATION GOAL

- **Top 12 markets**
 - Represent 80% of total U.S. visitation
 - Projected to add **22.7 million** visitors in 2027
- All other markets projected to add an additional **4.6 million** in 2027



Spending Goal: Expected to Surpass it by 2025

INTERNATIONAL VISITOR SPENDING IN THE USA (IN BILLIONS USD)



Source: Brand USA calculations based on U.S. Department of Commerce, BEA, Tourism Economics, June 2024

Note: The top 10 overseas markets are based on actual visitation data from 2023 and include the U.K., Germany, India, Brazil, South Korea, France, Japan, China, Italy, and Australia.

PATH TO 2027 SPENDING GOAL

- **Top 12 markets**
 - Represent 60% of total U.S. spending in 2023
 - Projected to add **\$109 billion** in spending by 2027
 - CAGR 16.7%
 - Share in total spending will increase to 66%
- All other markets projected to add an additional **\$35 Billion** by 2027
 - CAGR 9.2%



MARKET PRIORITIZATION MODEL

Three-stage process

1. Tiering of Markets
2. Market Grouping by Market Objectives
3. Alignment of Market Categories and Objectives

Key Variables Considered:

- **Market Dynamics:** Size, growth, and accessibility.
- **Visitor Value:** Average spending and purchasing power.
- **Market Risks:** Volatility and potential downturns.
- **Brand USA Legacy:** Historical marketing investment and/or presence (in-market representation).

How it works:

- Model scores and ranks these factors to categorize markets both into tiers and market objectives categories
- Flexible assessment on an annual basis or for the entire three-year plan based on evolving circumstances

TERMINOLOGY

BRAND USA LEGACY

Refers to the historical investment and presence of Brand USA in various markets, encompassing past initiatives, partnerships, and in-market representation aimed at promoting U.S. travel and tourism.

CATEGORIES

Markets are methodically ranked and categorized based on their performance, considering various factors such as macroeconomic indicators, historical visitation and spending trends, as well as projections for future market dynamics.

MARKET OBJECTIVES

Within the context of market prioritization, define the specific outcomes Brand USA aims to achieve within each identified market. These objectives provide a focused perspective, enabling a market evaluation through the company's lens and aligning efforts to optimize both market performance and strategic goals.

MARKET CATEGORIES

CORE

Top-performing markets with strong Brand USA legacy.

GROWTH

Markets with strong growth potential and Brand USA legacy.

INTERMEDIATE

Markets with moderate performance and variable growth, mixed Brand USA legacy.

EMERGING

Developing markets with potential, little Brand USA presence.

REMAINING

Low-performing markets with limited potential and no Brand USA impact.

MARKET OBJECTIVES

Maintain: Sustain the current level of visitation, visitor spending, and brand equity from established high-volume markets to ensure repeat visits and maintain a positive destination image.

Expand: Increase visitation, visitor spending, and enhance brand equity from high-volume markets with significant growth potential by attracting new visitor segments and expanding the destination's appeal to a broader audience.

Diversify: Explore and develop new tourism markets or product categories to reduce dependency on existing high-volume markets and enhance the destination's long-term sustainability, visitation, spending, and brand equity.

Stabilize: Maintain a consistent presence and engagement with mid-size markets with low growth, without significant investment, to retain a baseline level of visitation and spending.

Monitor: Assess and prioritize markets where the potential for growth is limited or not aligned with the destination's strategic objectives, ensuring efficient allocation of resources, and focus on more promising opportunities.

ALIGNMENT: MARKET CATEGORIES & OBJECTIVES

CORE (MAINTAIN/EXPAND)

These markets are essential for maintaining current level of visitation, spending, and brand equity. They also offer opportunities for expansion by attracting new visitor segments and enhancing appeal. Core markets receive significant attention and resources to sustain their positive impact on the USA's image and revenue generation.

GROWTH (EXPAND/DIVERSIFY)

Markets with significant potential for expansion. They may also serve as platforms for diversification efforts aimed at reducing dependency on existing markets and broadening appeal. While not as established as core markets, growth markets require strategic focus and investment to capitalize on their growth trajectory.

INTERMEDIATE (MONITOR/STABILIZE)

These markets may offer opportunities for expansion by leveraging moderate growth trends and adapting strategies to capitalize on emerging opportunities, but are undergoing changes in visitation patterns and spending behaviors. Close monitoring of these shifts is necessary, along with proactive adaptation of strategies to capitalize on emerging opportunities.

ALIGNMENT: MARKET CATEGORIES & OBJECTIVES

EMERGING (DIVERSIFY/EXPAND)

Emerging markets represent markets of opportunity for diversification efforts aimed at exploring and developing new tourism markets or product categories as visitation is beginning to increase. They may also offer potential for expansion by capitalizing on nascent visitation volume and spending potential. The goal is to diversify offerings and expand the presence in these markets to establish a foothold and nurture future growth.

REMAINING (MONITOR)

Remaining markets are subject to monitoring to assess alignment with strategic objectives and potential for growth. Experiencing limited visitation and no significant growth. There is no Brand USA legacy.

THREE-YEAR (FY25-FY27) MARKET PRIORITIZATION

CORE

Canada
Mexico
U.K.
Germany
India
Brazil
France

GROWTH

Japan
China
Australia
South Korea

INTERMEDIATE

Colombia
Italy
Spain
Benelux
Ireland
Switzerland
Nordics

EMERGING

Argentina
Costa Rica
Philippines

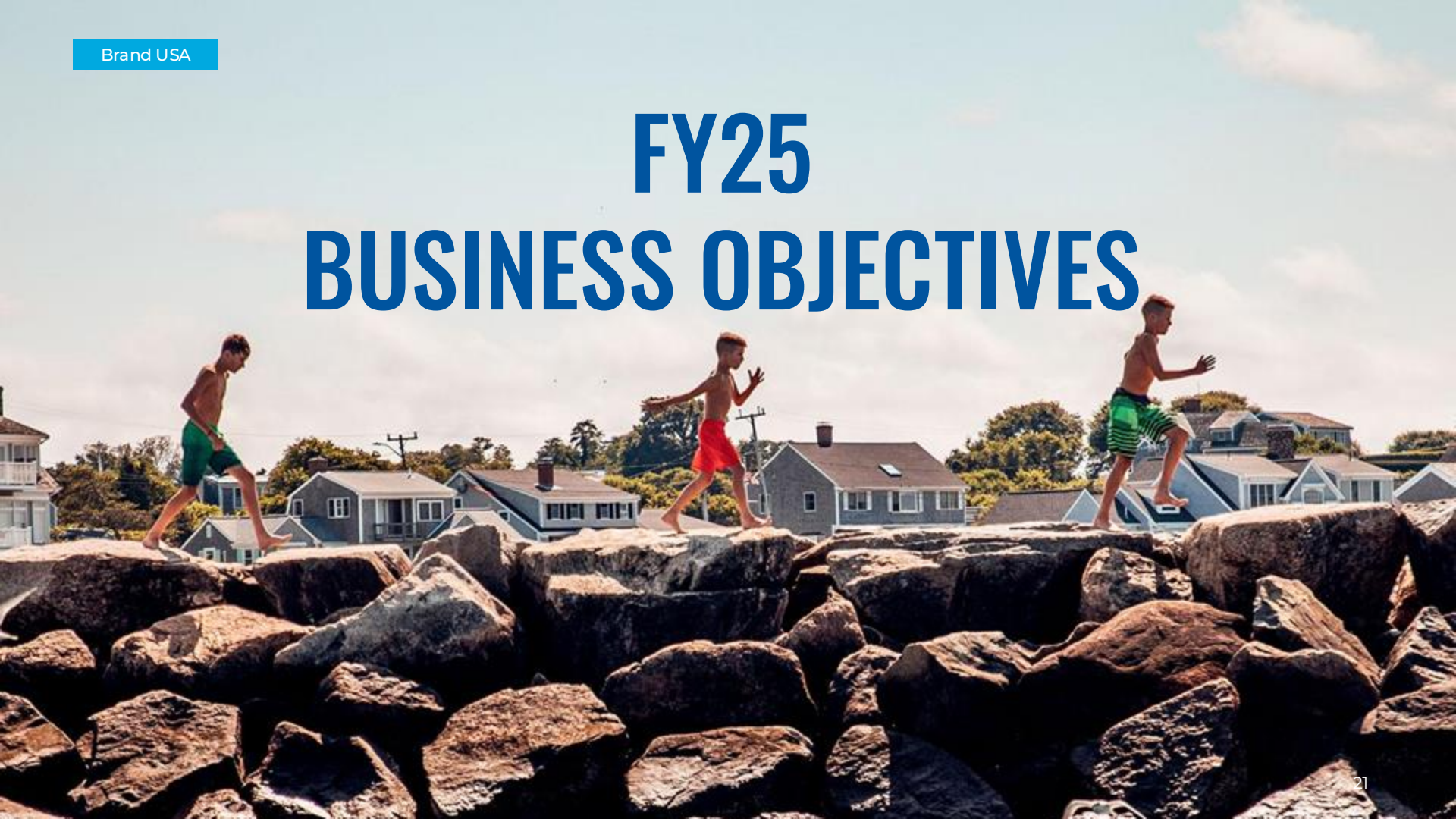
(+18 other
markets)

FY25

Business Plan:
Objectives, Goals
and Strategies



FY25 BUSINESS OBJECTIVES



STRATEGIC PLATFORM

WE EXIST TO (VISION)

Enrich lives by welcoming the world to travel to the USA

THEREFORE WE (MISSION)

Create community prosperity through partnership, leadership, and travel inspiration

WE DELIVER FOR

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

AND DO IT ALL WITH (VALUES)

ACCOUNTABILITY

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

COLLABORATION

We are stronger when we come together.

COURAGE

We are bold and take smart risks.

INCLUSIVITY

We are inclusive and welcoming to all.

PARTNERSHIP

We add and create value in our relationships.

ORGANIZATIONAL OBJECTIVES

Establish and maintain the USA as the preferred global travel destination

FY25 GOALS

- Create innovative global marketing initiatives to inspire and sustain visitation.
- Enhance global brand awareness and perception.

FY25 STRATEGIES

- Develop and optimize marketing campaigns tailored to each stage of the traveler journey to drive intent to visit and enhance desirability of the USA as a travel destination
- Elevate global brand awareness and perception through captivating storytelling and visually appealing content showcasing the diverse experiences the USA offers.
- Leverage strategic partnerships with iconic brands to enhance destination appeal

FY25 METRICS / TARGETS

- Intent to visit the USA (+2 percentage points YOY)
- Brand awareness of the USA as a travel destination (90%+)
- Perception of the USA as a travel destination (65%+)

ORGANIZATIONAL OBJECTIVES

Contribute to
community
prosperity
by driving
international
visits and spend

FY25 GOALS

- Build a foundation for sustainable long-term growth of the U.S. visitor economy

FY25 STRATEGIES

- Drive visitation growth and enhance visitor spending from prioritized international markets
- Expand Brand USA's market presence in targeted growth markets
- Drive traveler dispersal to destinations across the U.S.

FY25 METRICS / TARGETS

- Attributable incremental increase in visitation (+30% FY25 over FY23)
- Attributable incremental increase in visitor spending (+45% FY25 over FY23)
- USA long haul market share (13%)
- Traveler dispersal across the USA (+10% YoY)

ORGANIZATIONAL OBJECTIVES

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

FY25 GOALS

- Create impactful programs and initiatives that provide value to stakeholders in the U.S. travel industry, supporting their efforts to promote international travel to the USA

FY25 STRATEGIES

- Develop and maintain robust partnerships with stakeholders across the U.S. travel industry, ensuring high levels of partner satisfaction and engagement to achieve mutual success in promoting international travel to the USA
- Engage and promote a diverse base of U.S. stakeholders and create opportunities throughout the travel industry for underrepresented groups

FY25 METRICS / TARGETS

- Partner program retention rate (90%)
- Partnership satisfaction (90%)
- Develop a U.S. Stakeholder Diversity Index

ORGANIZATIONAL OBJECTIVES

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

FY25 GOALS

- Foster a team that is forward-thinking, innovative, and collaborative to drive impactful industry leadership

FY25 STRATEGIES

- Ensure Financial Integrity and Compliance
- Promote DEI initiatives into organizational practices and partnerships
- Enhance Brand USA's positive industry perception

FY25 METRICS / TARGETS

- Overall Brand USA ROI (+24% *FY25 over FY23*)
- Compliance and audit (100% Compliance)
- Federal match: Secure private funding to match federal contributions (*\$100M*)
- Year two (2) implementation of DEI Strategic Plan tactics

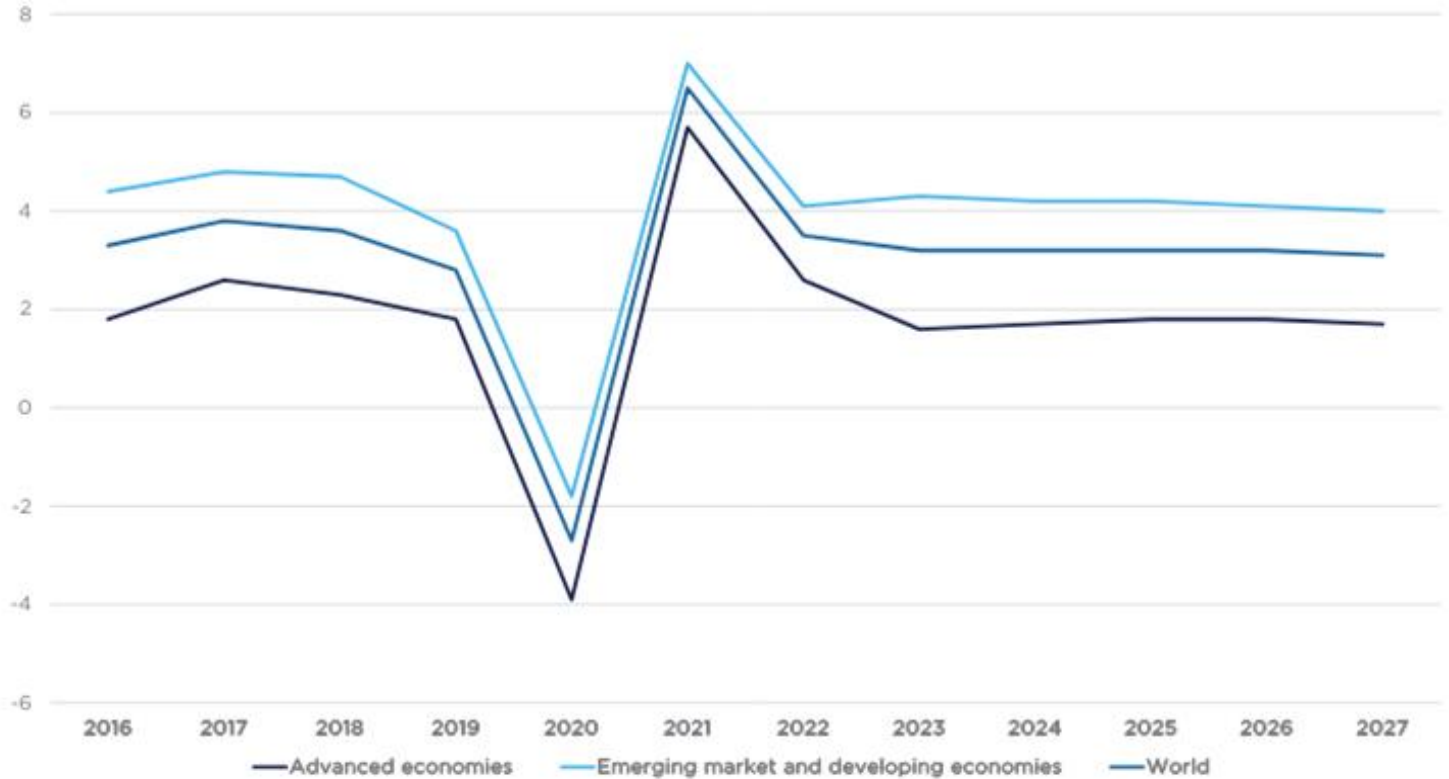
Brand USA

GLOBAL TRAVEL AND TOURISM LANDSCAPE

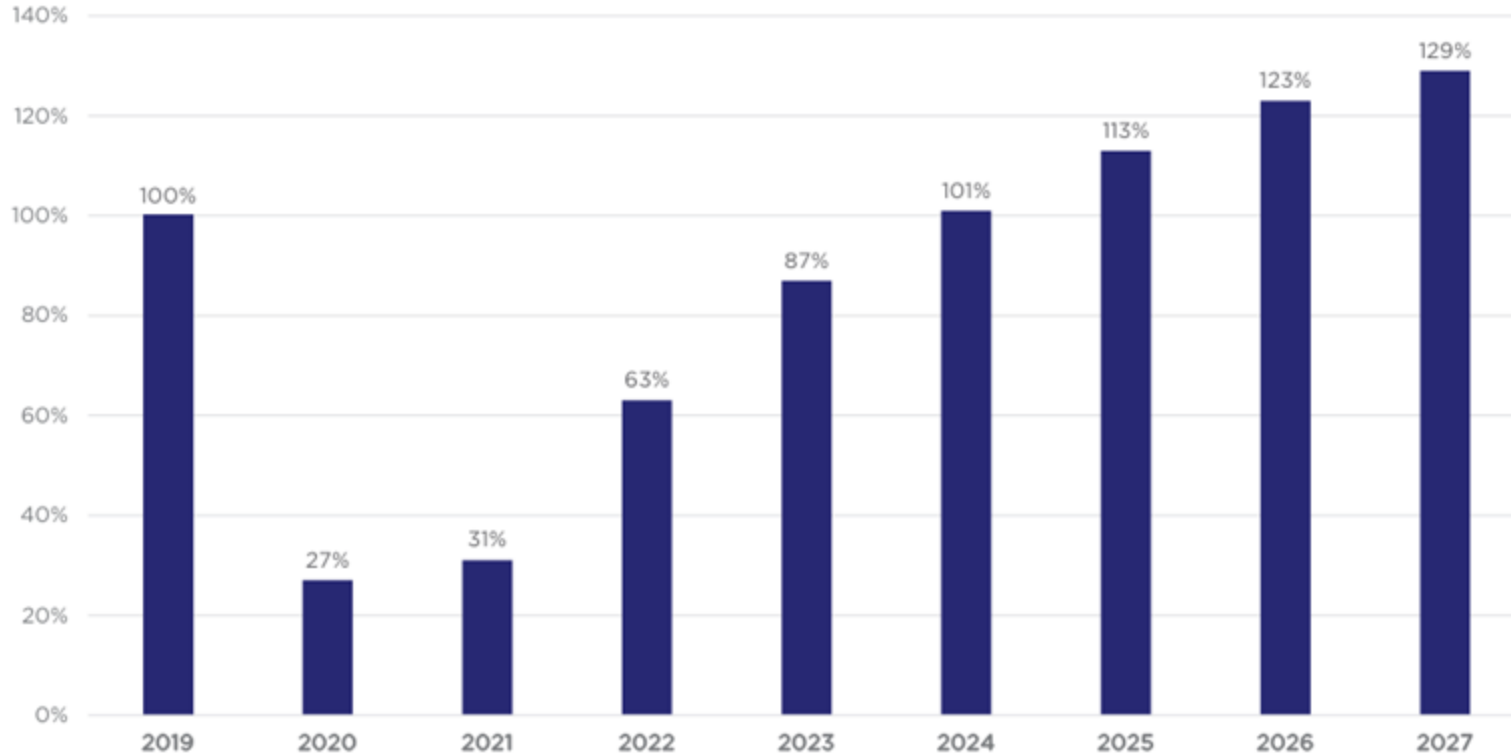


Global Economic Outlook

REAL GDP GROWTH (Annual % change)



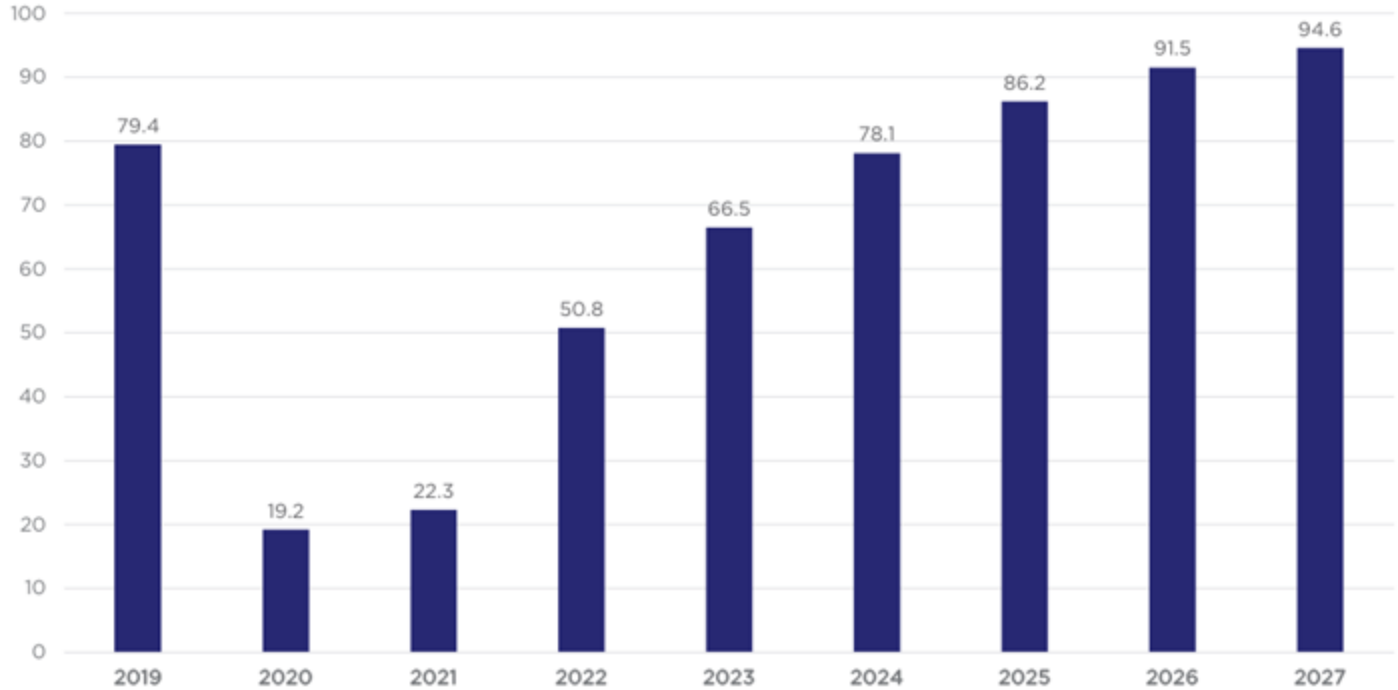
WORLD INTERNATIONAL INBOUND ARRIVALS (% Relative to 2019 Levels)



Global Tourism Landscape

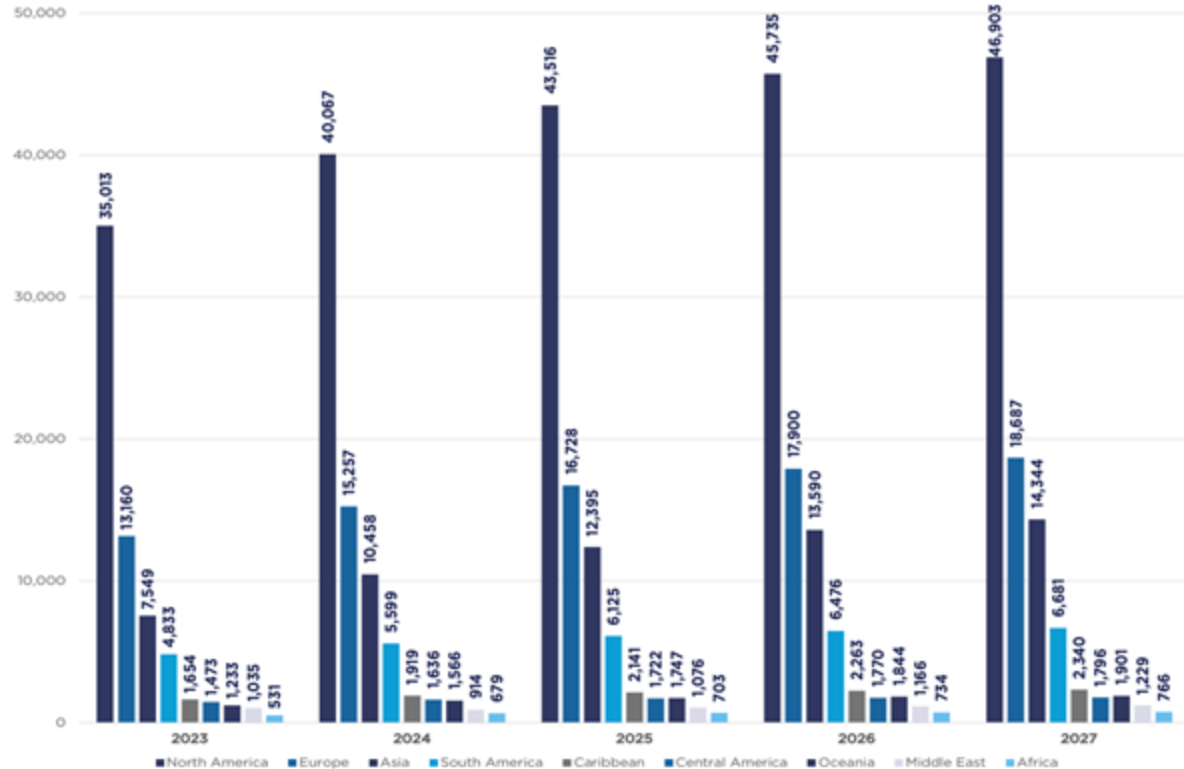
USA Inbound Tourism Landscape

U.S. TOTAL INBOUND ARRIVALS (In Millions)



USA Inbound Tourism Landscape

U.S. INTERNATIONAL ARRIVALS - REGIONAL (In Millions)



CHALLENGES & HEADWINDS

- Rising cost of travel / inflation
- Geopolitical uncertainties
- Increased competition
- Changing traveler behaviors
- Waning USA brand perception



DETERRENTS TO TRAVEL TO THE USA

In next 12 months

Challenges & Headwinds



Source: Brand USA/Big Village's Caravan Omnibus Study

Q: Why is the United States not a likely holiday destination for you in the next 12 months?

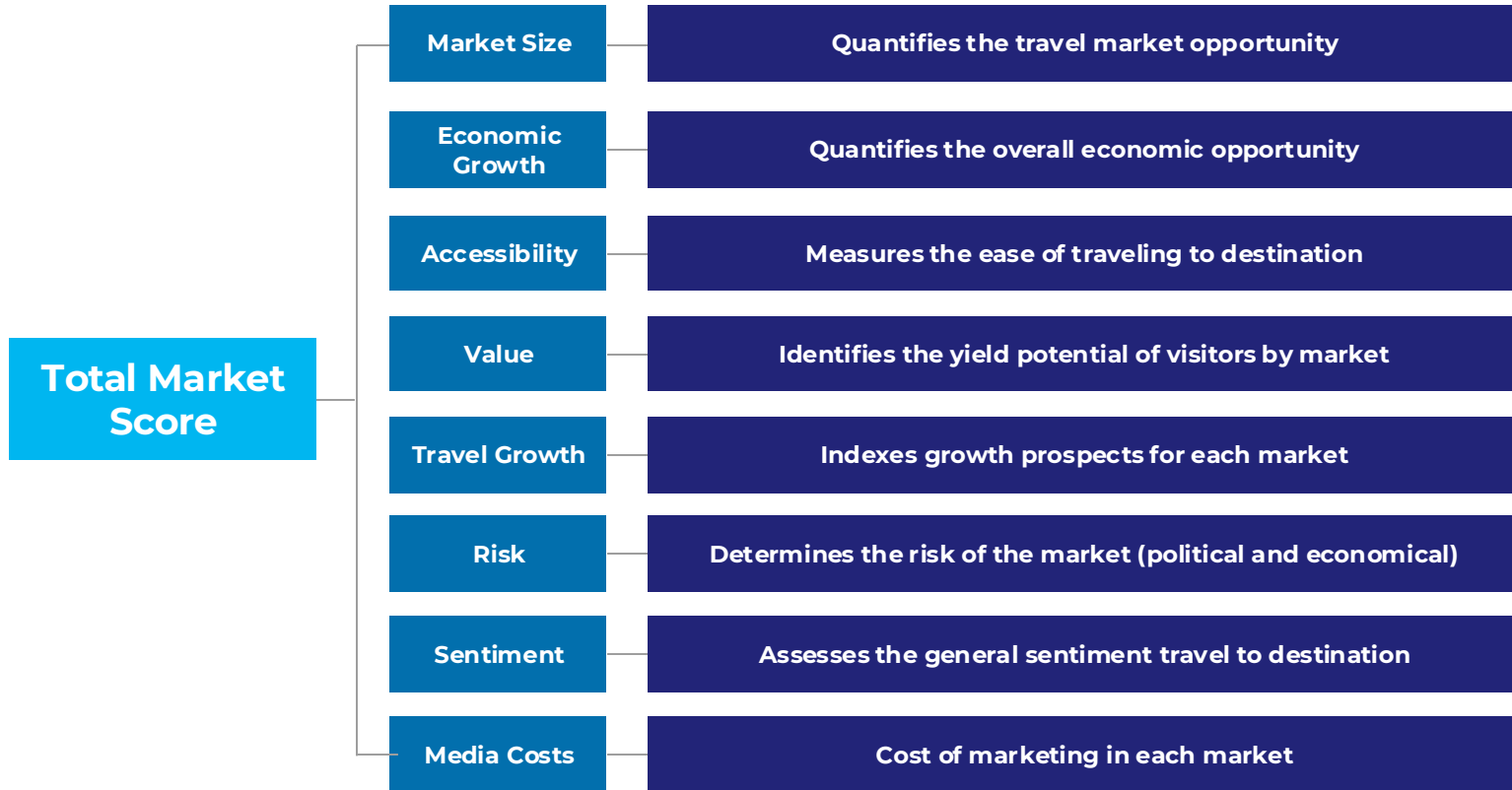
Base: Very/somewhat likely to take an international holiday in the next 12 months but it won't be to the U.S. (N= 6,027)

FY25 MARKETING PLAN

MARKET SELECTION PROCESS



MARKET ALLOCATION MODEL



STRATEGIC MARKETING FRAMEWORK

Inspire with a Variety of Distinctive Possibilities

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

Educate with Targeted & Individualized Experiences

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



Simplify Planning

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

Convert Travelers with Urgency & Seamless Integrations

Drive urgency to book now through our partners.

STRATEGIC MARKETING FRAMEWORK

Our marketing addresses travelers' needs across their decision-making journey.

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

FY25 TARGET MARKETS

North America

Canada
Mexico

Latin America

Brazil
Colombia

Europe

Benelux
(Belgium, Netherlands, Luxembourg)

DACH Region

(Germany, Switzerland, Austria)

France
Ireland
Italy

The Nordics

*(Denmark, Norway, Sweden, Finland,
Iceland)*

Spain
United Kingdom

Asia & Oceania

Australia & New Zealand
China
India
Japan
Southeast Asia
South Korea

MARKET OBJECTIVES

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

* Market included in a regional approach

** Investment in market is limited

	Market-Specific Strategies					
	Visitation	Spend			Awareness & Perception	
Markets	Increase Visitation / Visit Frequency	Destination Dispersal	Increase Length of Stay	Increase Traveler Spend (per trip)	Improve Brand Perception	Increase Brand Awareness
Australia / New Zealand	X	X			X	X
Benelux <i>(Belgium, Netherlands, Luxembourg)</i>	X					
Brazil	X	X		X		
Canada	X	X			X	
China	X				X	X
Colombia		X				
DACH Region <i>(Germany, Switzerland, Austria)</i>		X			X	
France	X			X		
India	X	X		X		
Italy	X					
Japan	X				X	X
Mexico	X		X	X		
The Nordics <i>(Denmark, Norway, Sweden, Finland, Iceland)</i>	X	X				
South Korea	X	X				X
Spain	X					
Southeast Asia	X					X
United Kingdom & Ireland	X			X	X	

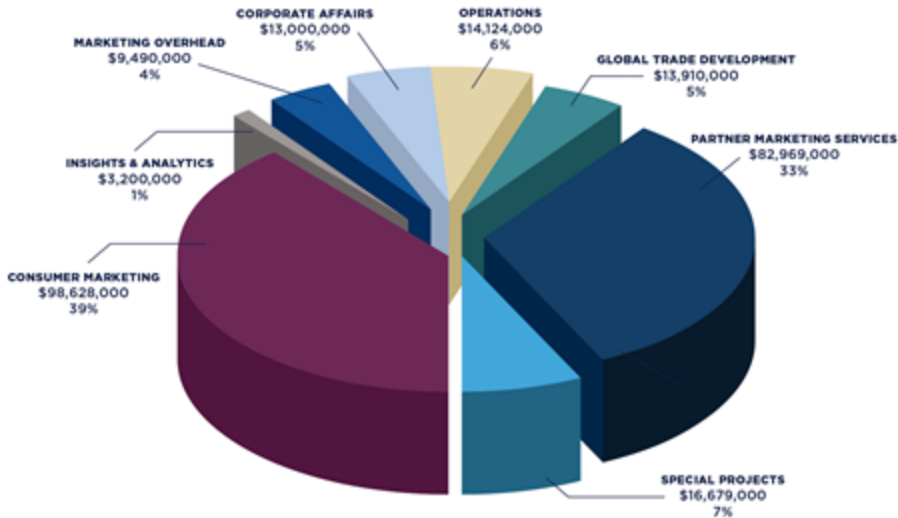
FY25 BUDGET



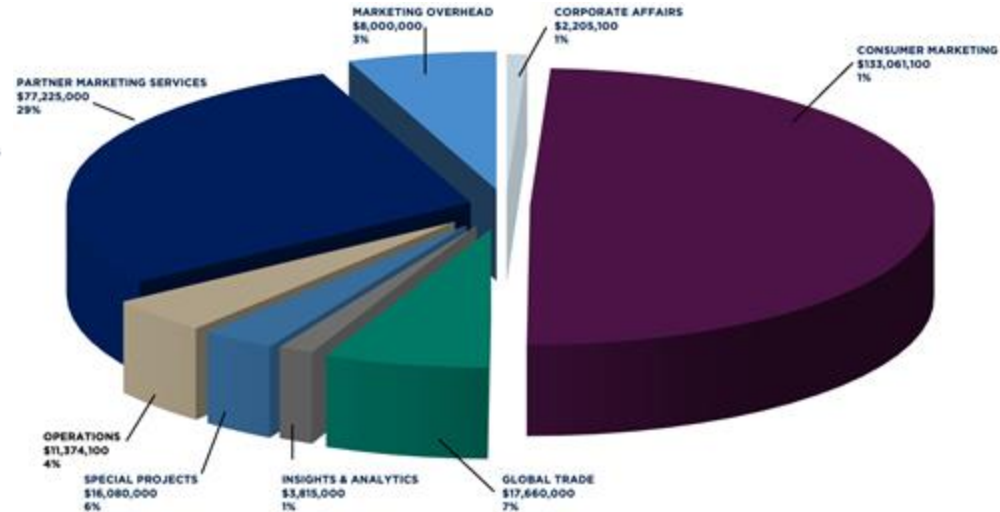
FY25 AND FY24 EXPENSE BUDGET COMPARATIVE

(As of June 30, 2024)

FY25 Expense Budget



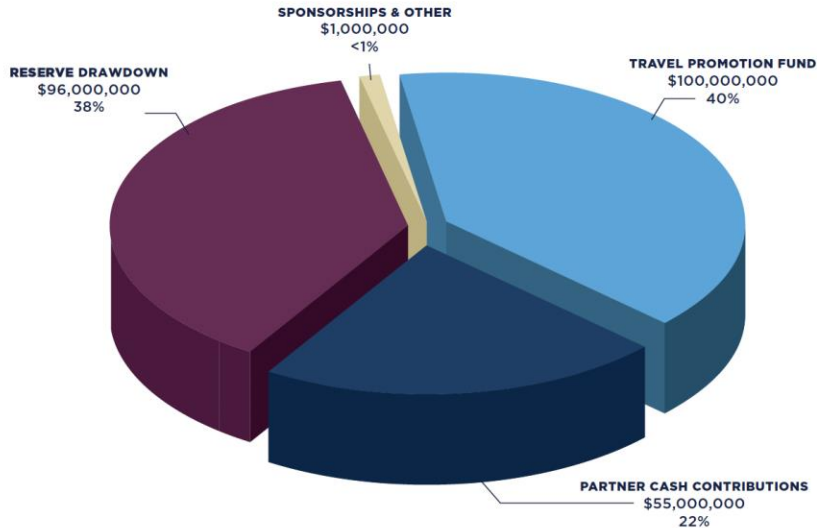
FY24 Expense Budget



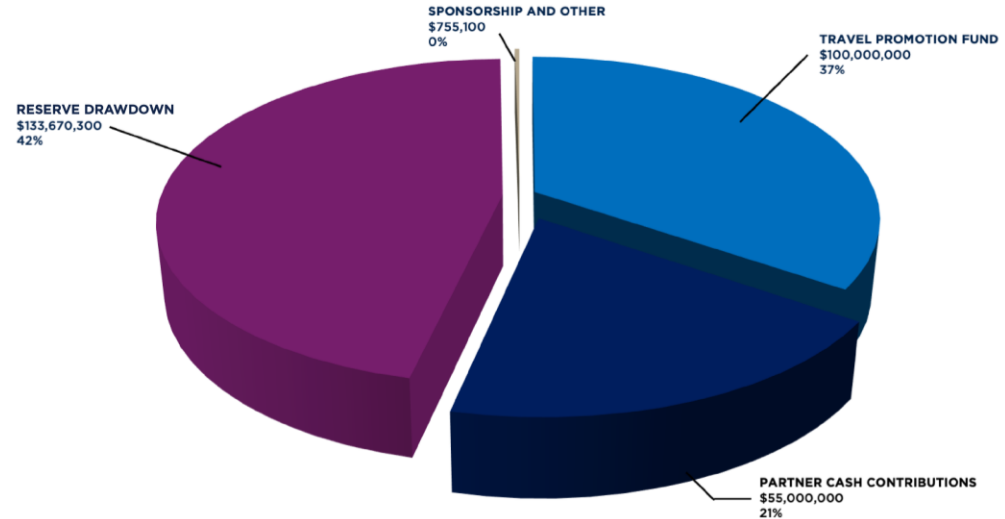
FY25 AND FY24 REVENUE BUDGET COMPARATIVE

(As of June 30, 2024)

FY25 Revenue Budget



FY24 Revenue Budget



BOARD VOTE

- Vote: Approval of FY25 Business Plan, Objectives, and Budget
 - Direct staff to finalize and send to the U.S. Department of Commerce by August 1, 2024.

Brand USA

Board
Committees



VOTE: BOARD COMMITTEES

- Audit Committee
- Conflict of Interest
- Executive Evaluation Committee
- Governance and Nominating Committee



Brand USA

Current Year
Report

YEAR-TO-DATE JUNE 30, 2024 FINANCIALS



YTD FY24 FINANCIAL HIGHLIGHTS

(As of June 30, 2024)

- **Revenue**

Total revenue YTD: \$101M

- Cash Contributions: \$57.6M
- In-Kind Contributions: \$42.3M
- Sponsorships and Other: \$1.1M

- **Expenses**

- Total Program Expenses: \$180.1M

- **Cash**

- Cash Reserves is strong

- **Travel Promotion Fund**

- On track to meet match requirement



FY24 METRICS DASHBOARD

Balanced Scorecard Against FY24 Objectives

ESTABLISH AND MAINTAIN THE USA AS THE PREFERRED GLOBAL TRAVEL DESTINATION.



ORGANIZATIONAL GOALS

Create innovative global marketing programs to inspire and sustain visitation

FY24 STRATEGIES:

Global Brand Perception & Intent to Visit

Brand Perception

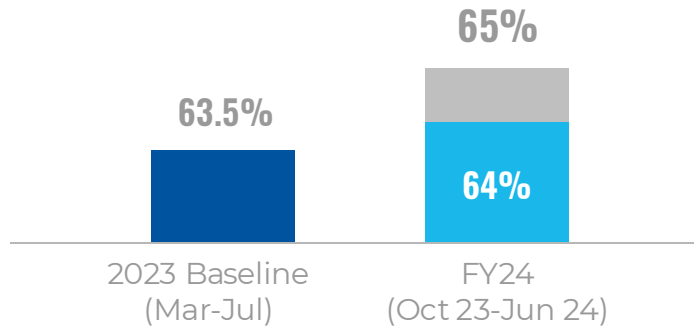
- 3% increase in overall brand perception of the USA as a travel destination (macro)
- 6% increase in brand perception from those exposed to Brand USA marketing activities (org)

Intent to Visit/Desirability:

- 3% YoY growth in travel intent (macro)
- 5% increase in travel intent for those exposed to Brand USA advertising (org)

GLOBAL BRAND PERCEPTION

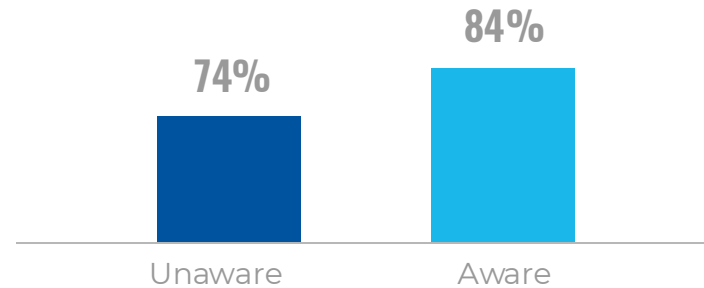
3% increase in overall brand perception of the USA as a travel destination (macro)



ON TRACK: ●

Methodology: Online Omnibus Survey. 13 markets
 Q. If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude towards the United States? R/% of those would recommend the U.S + % of who would speak positively about it.
 Source: Brand USA/Big Village Caravan Omnibus Study

6% increase in brand perception from those exposed to Brand USA marketing activities (org)

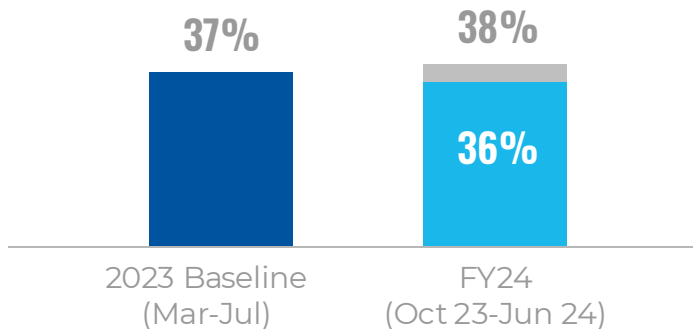


ON TRACK: ●

Methodology: Ad Effectiveness Study
 Q. How would you describe your IMPRESSION of the USA as a leisure destination?
 R/ % of Favorable (Very and somewhat favorable)
 FY24, H1
 Source: Brand USA/SMARI FY24 Q1 results

INTENT/DESIRABILITY TO TRAVEL TO THE USA

3% YoY growth in travel intent (macro)



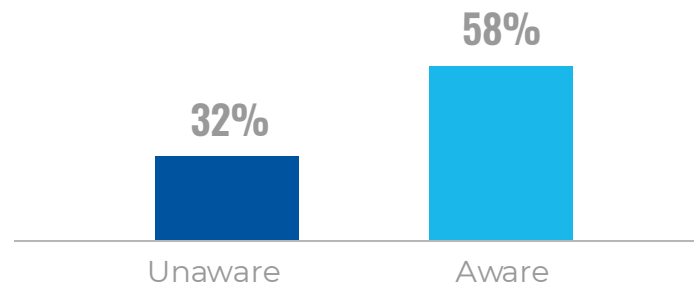
ON TRACK: ●

Methodology: Online Omnibus Survey. 13 markets

Q. When, if ever, are you likely to visit the United States? R/% Next two years

Source: Brand USA/Big Village Caravan Omnibus Study

5% increase in travel intent for those exposed to Brand USA advertising (org)



ON TRACK: ●

Methodology: Ad Effectiveness Study

Q. How likely are you to visit the United States for a leisure trip in the next 12 months? FY24, H1

Source: Brand USA/SMARI FY24 Q1 results

**CONTRIBUTE TO
COMMUNITY PROSPERITY
BY DRIVING
INTERNATIONAL
VISITS AND SPEND.**



ORGANIZATIONAL GOALS

Build a foundation for long-term growth of the U.S. visitor economy

FY24 STRATEGIES:

Increase visitation and visitor spending, visitor dispersal and growth market presence.

- 18% YoY international visitor growth from Brand USA Core markets (macro)
- 30% YoY increase in incremental visitation attributable to Brand USA (org) (Annual data)
- 17% YoY growth in visitor spend (macro)
- 35% YoY visitor spend attributable to Brand USA activities (org) (Annual data)
- Include a minimum of 180 “beyond the gateway” destinations within Brand USA marketing efforts
- A minimum of 5% of Brand USA media budget invested in growth markets

U.S. INBOUND ARRIVAL FY24 YTD*

(October-May)

18% YoY international visitor growth from Brand USA Core markets (macro)

	Δ YOY	FYTD period	% Recovered
Canada	4%	Oct - Feb	100%
Mexico	21%	Oct- Feb	87%
Overseas	23%	Oct - May	86%
11 Core markets	17%	Oct-Feb*	89%

ON TRACK: 

Methodology: ADIS/I-94 visitor monthly arrivals data by COR

Source: U.S. Department of Commerce/NTTO

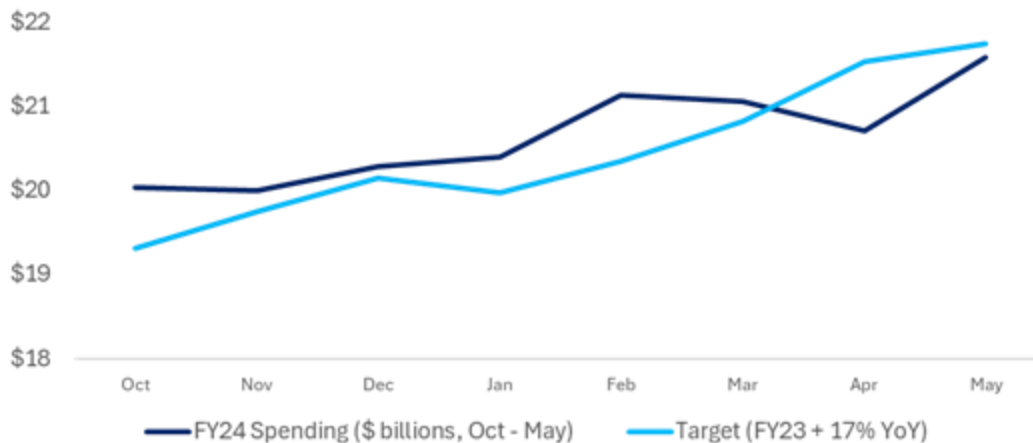
* Top 10 Overseas FYTD = Oct - May.

Top 10 Overseas	Δ YOY	% Recovered
United Kingdom	5%	84%
India	41%	151%
Brazil	30%	84%
Germany	17%	97%
Japan	68%	49%
South Korea	20%	83%
France	17%	98%
China	100%	51%
Colombia*	22%	104%
Italy	25%	102%

* Colombia not a Brand USA core market

INTERNATIONAL VISITOR SPEND

17% YoY growth in visitor spend (macro)



ON TRACK:



Methodology: International Travel Receipts and Payments Program

Source: Bureau of Economic Analysis and the National Travel and Tourism Office (NTTO)

BEYOND THE GATEWAY

As of February 29, 2024

KPI: Include a minimum of **180 “beyond the gateway”** destinations within Brand USA marketing efforts

86% of Partner Program participations have featured non-gateway destinations

ON TRACK: 

Methodology: Number of partner program participations to FY programs (excluding general media) featuring Urban Non-Gateway or Rural destinations

Source: Brand USA internal data

MEDIA BUDGET INVESTED IN GROWTH MARKETS

KPI: A **minimum of 5%** of Brand USA media budget invested in growth markets

4.1% of media budget has been spent FYTD (May) in growth markets

ON TRACK: 

Methodology: Markets in which Brand USA has not traditionally invested in consumer media but has had a non-media related presence (Trade / PR).

Source: Brand USA internal data

LEAD AND ENGAGE STAKEHOLDERS OF THE U.S. TRAVEL INDUSTRY.



ORGANIZATIONAL GOALS

Develop valuable programs for stakeholders to support international travel efforts

FY24 STRATEGIES:

Strengthen and grow partnerships, maintain partnership contributions, and promote a diversity of U.S. stakeholders.

- Maintain 90% partner sentiment that Brand USA provides value to their organization
- Maintain annual partner retention rate of over 90%
- 300 unique stakeholder participants across all programs
- Fulfill the \$50MM cash contribution requirement
- Establish a benchmark for Brand USA's support / promotion of minority-owned, small, and rural businesses

PARTNER PARTICIPATION

KPIs: **90% satisfaction and retention, 300 participants \$50M contributions benchmark impact to small and minority owned businesses**

PARTICIPATION
SATISFACTION*



91%

ACTIVE
PARTNERS**



344

MAINTAINING
PARTNERSHIPS*



94%

SUBMITTED CASH
CONTRIBUTIONS
TO DOC



\$42MM

SMALL BUSINESS
TRACKING
IMPLEMENTED



200+
INCLUSIONS

ON TRACK:



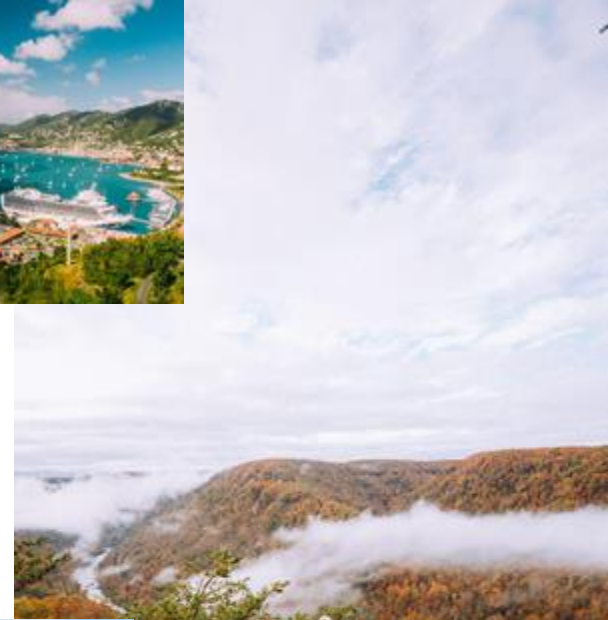
Methodology: Partnership participation overview

Source: Brand USA internal data - thru , 2024

* Annual partner satisfaction survey

** includes custom programs, Affinity programs, Partner Marketing Programs, and Trade activities

**MAINTAIN EXCELLENT
ORGANIZATIONAL INTEGRITY
AND REPUTATION,
SETTING THE STANDARD
FOR THE GLOBAL
TRAVEL INDUSTRY.**



ORGANIZATIONAL GOALS

Evolve Brand USA
for the future and
grow our culture
and team.

FY24 STRATEGIES:

Maintain top standards, build positive awareness and leverage our leadership position.

- Achieve 100% compliance and a clean audit
- 10% increase in overall positive earned media impressions for Brand USA mentions in U.S. or Global Travel Trade or business publications
- Execute Year 1 tactics of Brand USA's DEI Strategy

DEI STRATEGIC PLAN IMPLEMENTATION

KPI: Execute Year 1 Tactics of Brand USA's DEI Strategy

GOAL 1:

ENGAGEMENT

Grow Our Culture
and Our Team

GOAL 2:

INTERNAL

Grow Our Culture,
Our Team, Our
People

GOAL 3:

INDUSTRY LEADERSHIP

Become a leader
and change agent in
the travel industry
through our
actions within the
area of DEI

GOAL 4:

SUPPLIER DIVERSITY

Be a model and a
catalyst for full
integration of
diverse vendors in
the travel industry

ON TRACK:



Methodology: DEI Strategic Plan Year 1

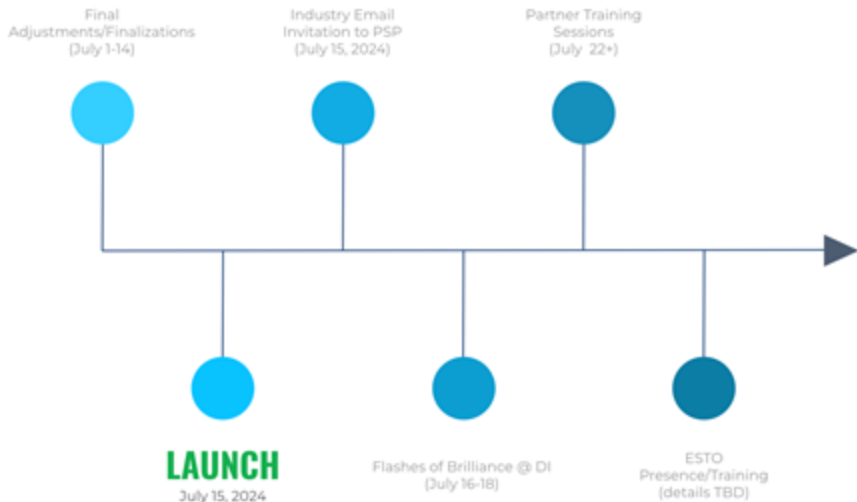
Source: Brand USA internal data

Brand USA

Partner Success
Portal



PARTNER SUCCESS PORTAL LAUNCH



Up Next
PHASE 2!



Consumer

Campaign Updates



CHINA CAMPAIGN

BRAND USA CHINA SOCIAL ECOSYSTEM



WeChat

Equivalent: Facebook



Weibo

Equivalent: Twitter

NEW CHANNELS



RED (小红书)

Equivalent: Instagram

- + **9 KOLs**
- + **Microsite on 6/15**



Douyin

Equivalent: TikTok



**WeChat Video +
WeChat Mini Program**

CELEBRITY KOL



Followers: 3.2M



Followers: 24M



Kiki is a popular influencer and television host with over 27 million followers on Chinese social media (Red, Bilibili, Douyin, Weibo, WeChat). In 2024, she had the honor of being one of the hosts of China's most watched television events of the year, The Spring Festival Gala.

We've partnered with Kiki for exclusive content on **Red** and **Douyin** and the preliminary organic results have been outstanding—exceeding her organic benchmarks.



Douyin Performance (06/18-07/09)



4M Video Views
187K Likes

2.3K Comments
17K Shares

"I wasn't interested in going to Seattle before, but after seeing this video I feel like I absolutely need to take a trip there."

COPA AMÉRICA CAMPAIGN

COPA AMÉRICA 2024

Show travelers how to plus up their soccer trip with unique and varied “only in the USA” experiences highlighting beyond the gateway destinations and recommending day trips to extend travelers’ stays.

PRE



The USA is your field, get ready to play
Inspire through content that merges a passion for travel and fútbol.

DURING



Beyond the match
Tap into travelers’ passion points by showing real-time content through a partnership with creators who match our audience’s interests.

POST



All eyes on U.S.
Recap content from our creator trips to inspire the dreaming stage for the World Cup and motivate travel planning.

COPA AMÉRICA CREATIVE PERFORMANCE

produced content with strict editorial reviews. Beyond this, we provide advertisers with granular capabilities for brand safety and brand suitability. We work with many of the most demanding brands in the world to ensure the integrity of their brand isn't compromised.

ADVERTISING



Effective targeting at scale in the cookieless era.

Welcome to the era of consumer privacy. Teads has built advanced cookieless capabilities enabling advertisers to leverage Predictive Audiences and Advanced Contextual targeting that

- Copa creative assets are resonating with target audience and contextual placements, delivering high performance
- VCR 80% performing (+22% than benchmark)
- \$0.01 CPCV (+66% more cost-efficient than benchmark)

OLYMPICS CAMPAIGN

OLYMPICS 2024

YOU CAN WATCH THE GAMES IN PARIS. HERE, YOU CAN EXPERIENCE THEM.

Games wide open - We have natural ways into the conversation through breakdancing, Skateboarding, Surfing and Sport Climbing. They will be the talk of Paris and they are culturally deeply associated with the USA.

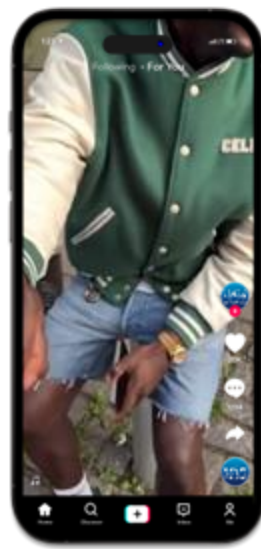
Here, you can sports - Those same sports reflect the values of Here, You Can – individual sports based on free-style expression and making your own rules.

Creating what's next - The next games are in LA. We can be a bridge to these conversations and highlight and inspire travel through this lens.

Planned 🧡 Agile social - We will maintain an ear to the ground to leverage trends and opportunities to make a splash in social conversations.



**TRAINING
GROUNDS**



GRWM



SEINE'D IT!



**BREAK IT
DOWN, PARIS**

CONTENT / GOUSA TV

GOUSA ESPAÑOL

- The LATAM region provides significant inbound travel potential (visitation & spend) to the USA for the next several years. Platform potential reach = 42M households
- Consumers streaming habits are strong and LATAM consumers are purchasing more smart TVs with FAST channel technology.
- Limited resources for consumer marketing investments across the region, GoUSA TV drives 2X desirability.
- Testing in-language programming to determine if dubbed content increases viewing habits



GOUSA ESPAÑOL

Off to a great start...

4.5M minutes watched in May 2024 (20% of total minutes watched globally for the month)

Live Now:

Mexico

Samsung TV Plus
LG Channels

Colombia

LG Channels

Spain

LG Channels

Pending Rollouts:

Argentina

LG Channels - Est. July 2024

Chile

LG Channels - Est. July 2024

Peru

LG Channels - Est. July 2024

Spain

Samsung TV Plus - Est. July 2024

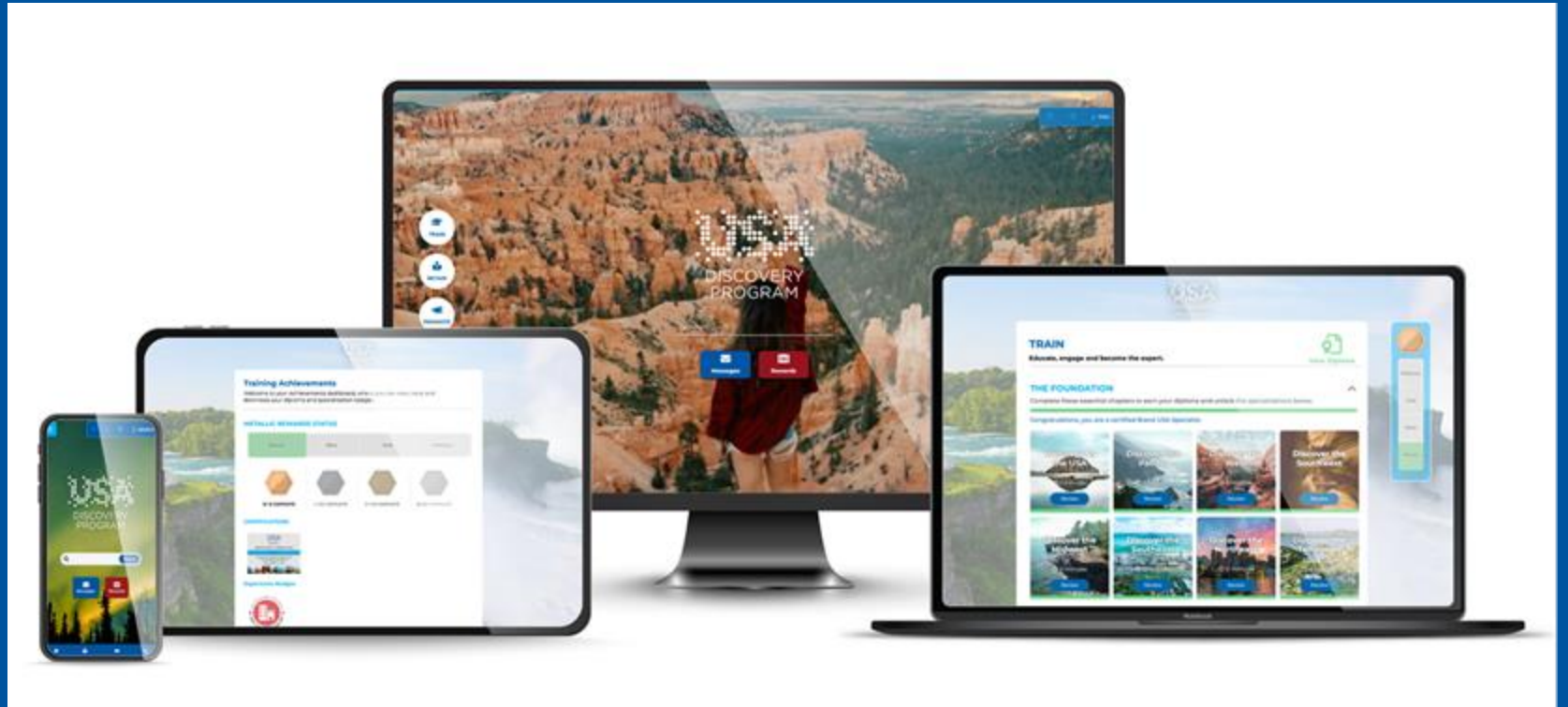


Brand USA

Trade
Activity



USA DISCOVERY PROGRAM RELAUNCH



TRADE MISSIONS AND FAMS: FY24

Jan 21-25, 2024

India Mission → 1,672 B2B meetings

Jan 29-Feb 2, 2024

Mexico Mission - 1,990 meetings

Feb 22-24, 2024

Australia B2B → 1,320 B2B meetings

March 11-15, 2024

South America Mission → 1,596 B2B meetings

April 12-18, 2024

Canada MegaFam → covering 12 different U.S. states and Washington, D.C.

June 3-7, 2024

Canada Connect → 900 B2B meetings

July 8-12, 2024

Japan Mission → 713 B2B meetings

July 15-18, 2024

South Korea Mission → 276 B2B meetings

Sept. 23-30

U.K./Ireland MegaFam → 12 states, 20 cities

FY24: 22 confirmed fams covering 23 different U.S. states, Washington, D.C. and Puerto Rico

SAVE THE DATE: FY25 SCHEDULE

Missions & B2B Days

Oct. 21-24, 2024

Travel Week U.K. & Europe

Jan. 13-17, 2025

Mexico Sales Mission

Jan. 19-24, 2025

India Sales & Media Mission

Feb. 13, 2025

Australia B2B

March 17-21, 2025

South America Mission

April 28-May 2, 2025

Canada Connect

July 2025*

Japan & South Korea Sales
Missions

Sept. 2025*

China Sales Mission

Other Events

Oct. 13-19, 2024

SXSW Sydney

Oct. 29-Nov. 4, 2024

South Korea MegaFam

Feb. 10-11, 2025

New Zealand Expos

March 24-28, 2025

Mexico Roadshow

March 23-April 4, 2025

The Great USA Road Trip Europe

May 13-20, 2025

UK/Ireland Mega Fam

June 2-7, 2025*

SXSW London

July 2025

The Great USA Road Trip Australia

**Pending*

Brand USA

Recent Industry
Platforms





IPW 2024
Los Angeles, CA | May 3-7



U.S.-China Tourism Leadership Summit
Xi'an, China | May 21-23

IMEX 2024
Frankfurt, Germany | May 14-16



Brand USA

Brand USA

Travel Week
U.K. & Europe





BRAND USA TRAVEL WEEK



U.K. & EUROPE 2024



OCTOBER 21-24, 2024

etc.venues County Hall | London



Closing Remarks.



Thank you.
