



Fiscal Year 2019 Business Plan

October 1, 2018





ABOUT THIS PLAN

As required by U.S. Code § 2131, the Travel Promotion Act, and as amended by the Travel Promotion, Enhancement, and Modernization Act of 2014, Brand USA submitted a summary of this plan to the Secretary of Commerce on August 1, 2018. It covers the fiscal year 2019 (FY2019) from October 1, 2018 through September 30, 2019.

The sections submitted to the Secretary of Commerce included:

- The annual objectives Brand USA has established for FY2019.
- The FY2019 summary marketing plan in support of the achievement of these objectives.
- The FY2019 budget, including an explanation of any expenditure provided for by the budget in excess of \$500,000.

On October 1, 2018, the Secretary of Commerce (after consultation with the Secretary of Homeland Security and the Secretary of State) approved the FY2019 objectives as submitted.

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The Brand USA team includes 72 dedicated team members and a network of international representatives. Approximately 10 percent of the organization's budget supports overhead—ensuring the vast majority of Brand USA's budget is dedicated to the international marketing effort to increase international visitation and spend in order to fuel the nation's economy.

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.2 million American jobs* and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked in close partnership with more than 800 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

According to studies by Oxford Economics, over the past five years Brand USA's marketing initiatives have helped welcome 5.4 million incremental visitors to the USA, benefiting the U.S. economy with \$38.4 billion in total economic impact, and supporting, on average, more than 51,000 incremental jobs each year.

Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

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

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

**Source: U.S. Department of Commerce*

STATEMENT OF PURPOSE

Our vision is to be the best-in-class national destination marketing organization — earning the USA the largest share of the global travel market and significantly contributing to job creation, gross domestic product (GDP,) export growth, and tax revenues.

Our mission is to increase incremental international visitation, spend, and market share to fuel our nation's economy and enhance the image of the USA worldwide.

We will realize our vision and accomplish our mission by staying true to these foundational elements:

Build and Maintain Trust

Build and maintain trusted relationships with stakeholders worldwide through inclusive, proactive, and transparent outreach with a commitment to compliance and integrity through words, actions, and results.

Create Innovative Marketing

Promote the entirety of the USA with innovative marketing that supports all 50 states, the District of Columbia, and five territories to, through, and beyond the gateways.

Add and Create Value

Add and create value by pioneering cooperative marketing platforms and programs that leverage and grow the USA brand in ways our partners would be challenged or unable to do on their own.

Market the Welcome

Inspire, welcome, and thank travelers while accurately communicating vital and compelling information about visa and entry policies.

Drive Results

Maximize and optimize the return on investment of Brand USA's resources by deploying the right messages, through the right channels, in the right markets, at the right times, and at the right levels of investment.

While specific objectives, goals, strategies, and measures will be developed on an annual basis to successfully realize our purpose, these elements establish the foundation for all we do. As we track our progress in pursuit of this purpose, the true measure of our success will be the degree by which we create sustainable funding sources and meet our responsibility to drive significant, year-over-year increases in incremental international visitation, spend, and market share and our country benefits in economic prosperity and growth as a result of our efforts. We will build upon the effectiveness of our overall destination marketing strategies by leveraging the strength of federal resources, including embassies and consulates, worldwide.





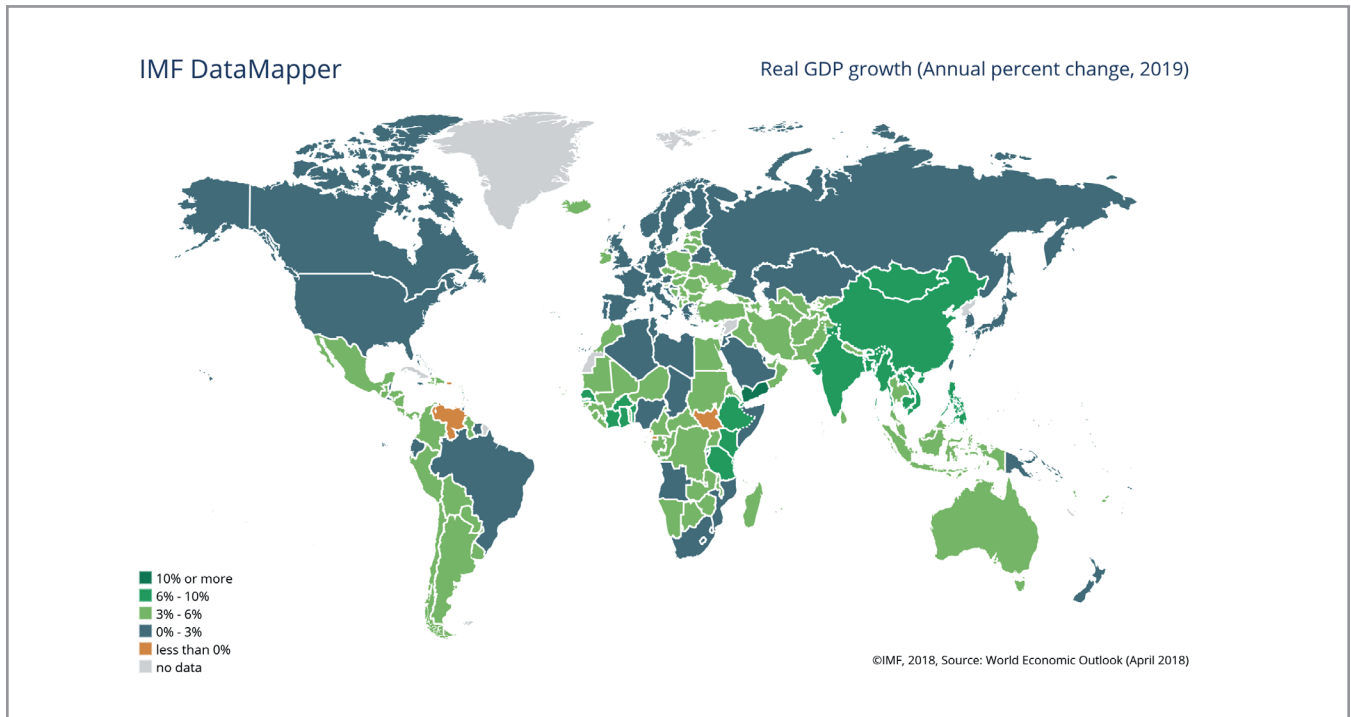
Situation Analysis

GLOBAL GROWTH RISING BUT UNEVEN

As of July 2018, the International Monetary Fund (IMF) projects global growth of 3.9 percent in 2018 and 2019, but the picture varies from market to market—with trade tensions putting pressure on the rate of expansion and the strength of the U.S. dollar continuing to create challenges for the U.S. tourism industry as travelers seek destinations that maximize value and experience.

Real GDP Growth

IMF Data Mapper © Source: World Economic Outlook (April 2018)



While the IMF has revised growth projections down as of July 2018 for key economies, including Brazil, Japan, The Euro area, and the United Kingdom, there are some bright spots in emerging and developing Asian markets (which are forecast to grow 6.5 percent from 2018 through 2019)—though growth in China is projected to moderate from 6.9 percent in 2017 to 6.6 percent in 2018, and 6.4 percent in 2019.

Although growth projections for India were revised downward since April 2018, growth is expected to remain relatively strong—from 6.7 percent in 2017 to 7.3 percent in 2018 and 7.5 percent in 2019. Additionally, growth in Latin America is projected to increase, albeit modestly and at a lower level than the April forecast, from 1.3 percent in 2017 to 1.6 percent in 2018 to 2.6 percent in 2019.

ARRIVALS TO THE USA REVISED UPWARD

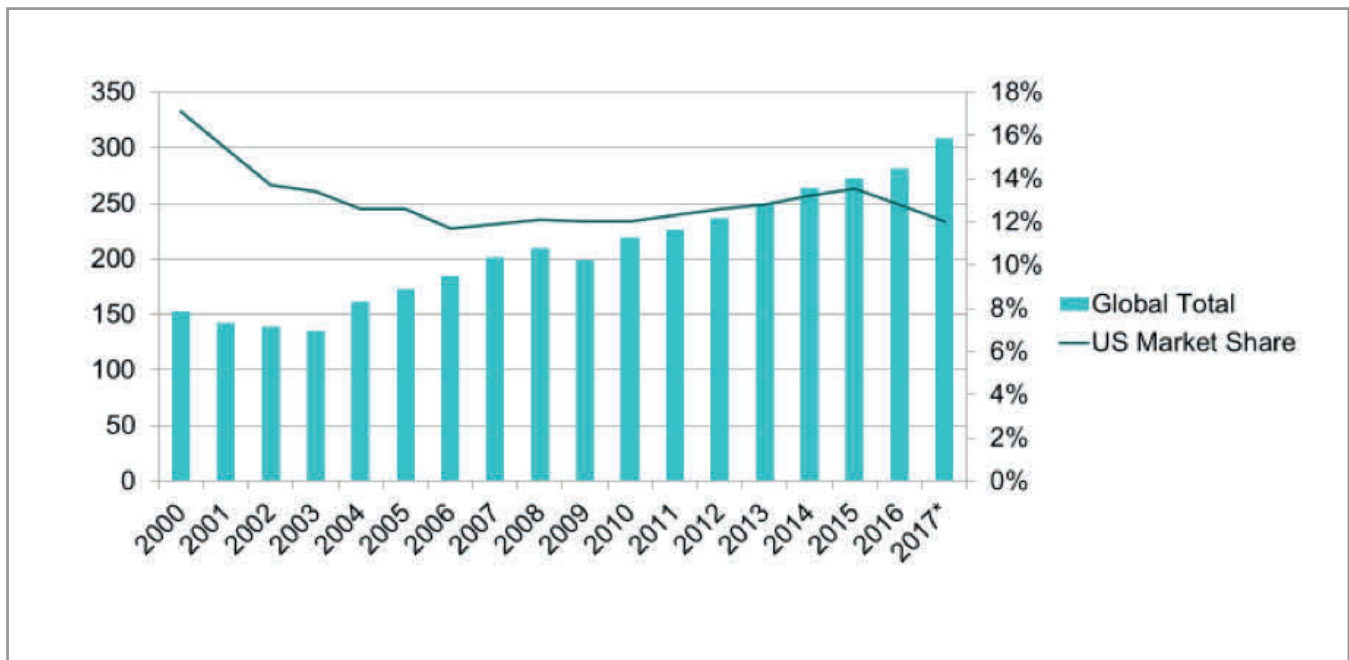
In September 2018, the U.S. Department of Commerce International Trade Administration's National Travel and Tourism Office (NTTO) announced revised data for international visitation to the United States that showed nearly 77 million international visitors came to the USA in 2017—up nearly 1 percent compared to the previous year. Growing markets outnumbered declining markets by 2-to-1 and were led by South Korea (+18 percent), Brazil (+11 percent), Argentina (+10 percent), Ireland (+9 percent), and Canada (+4.8 percent).

International visitors collectively spent a record-setting \$251.4 billion experiencing the United States in 2017, a 2 percent increase when compared to 2016. Spending on personal travel including leisure, education and health-related travel as well as passenger air transportation increased 3.1 percent and 3.4 percent, respectively. These increases more than offset the decline in business travel (down 3.2 percent), which has been decreasing since 2014. Education-related travel, in and of itself, accounted for nearly two-thirds (65 percent) of the increase in personal travel.

Over the course of 2017, travel and tourism exports helped support more than 1.2 million American jobs across the United States, and U.S. travel and tourism-related exports accounted for nearly 32 percent of all U.S. services exports and 11 percent of all U.S. exports, with goods and services combined.

While this growth rate is a substantial improvement over the previously reported arrivals (-6% through September 2017), the ongoing challenge remains the loss of market share the USA has experienced in competing for the world's travelers.

Global Long-Haul Trips and U.S. Market Share



Source: NTTO/Oxford Economics estimate

As shown in the chart above, the United States lost substantial market share of the world's global long-haul trips in 2017. The global total for long-haul trips grew by 10 percent in 2017, far outpacing the estimated growth for arrivals to the USA. Based on the strength of the dollar, heightened tensions across key markets based on trade and political dynamics, Brand USA anticipates that 2018 and 2019 will present a challenging environment for increasing demand and reversing U.S. market share loss.

Asia and Latin America are poised to be the strongest growth markets for inbound visitation in the near term - led by China and India - while Canada and Mexico are projected to be soft. Air demand from Canada and Mexico is likely to be relatively steady while drive volume is more at risk.

Forecast of International Travelers to the United States by Top Origin Countries

Forecast of International Travelers to the United States by Top Origin Countries																		
Estimates in thousands																		
Rank Order 2016	Visitor Origin Country	Actual 2016	% Change 16/15	Forecast 2017	% Change 17/16	Forecast 2018	% Change 18/17	Forecast 2019	% Change 19/18	Forecast 2020	% Change 20/19	Forecast 2021	% Change 21/20	Forecast 2022	% Change 22/21	Change 22/16	% Change 22/16	CAGR 22/16
	Grand Total	76,407	-1.8%	76,941	0.7%	79,940	3.9%	82,951	3.8%	85,572	3.2%	88,481	3.4%	91,358	3.3%	14,950	20%	3.0%
1	Canada	19,287	-7%	20,212	5%	21,021	4%	21,651	3%	22,084	2%	22,747	3%	23,429	3%	4,142	21%	3.3%
2	Mexico	18,991	3%	17,824	-6%	18,180	2%	18,725	3%	19,287	3%	19,866	3%	20,462	3%	1,471	8%	1.3%
	Overseas	38,129	-1.5%	38,906	2.0%	40,739	4.7%	42,574	4.5%	44,200	3.8%	45,868	3.8%	47,466	3.5%	9,337	24%	3.7%
3	United Kingdom	4,587	-7%	4,483	-2%	4,528	1%	4,573	1%	4,710	3%	4,898	4%	4,996	2%	409	9%	1.4%
4	Japan	3,604	-5%	3,596	-0%	3,703	3%	3,778	2%	3,778	0%	3,778	0%	3,815	1%	212	6%	1.0%
5	China	3,050	16%	3,174	4%	3,396	7%	3,736	10%	4,072	9%	4,398	8%	4,749	8%	1,700	56%	7.7%
6	Germany	2,046	-10%	2,080	2%	2,122	2%	2,164	2%	2,186	1%	2,208	1%	2,230	1%	184	9%	1.4%
7	South Korea	1,983	12%	2,335	18%	2,498	7%	2,623	5%	2,728	4%	2,810	3%	2,894	3%	912	46%	6.5%
8	Brazil	1,725	-23%	1,912	11%	2,008	5%	2,088	4%	2,151	3%	2,194	2%	2,238	2%	512	30%	4.4%
9	France	1,641	-7%	1,668	2%	1,768	6%	1,856	5%	1,893	2%	1,931	2%	1,950	1%	309	19%	2.9%
10	Australia	1,351	-7%	1,324	-2%	1,377	4%	1,418	3%	1,460	3%	1,504	3%	1,580	5%	229	17%	2.6%
11	India	1,207	5%	1,285	7%	1,324	3%	1,377	4%	1,446	5%	1,533	6%	1,625	6%	418	35%	5.1%
12	Italy	989	-5%	1,032	4%	1,104	7%	1,149	4%	1,160	1%	1,183	2%	1,207	2%	218	22%	3.4%
13	Argentina	926	16%	1,018	10%	1,069	5%	1,112	4%	1,156	4%	1,203	4%	1,251	4%	324	35%	5.1%
14	Colombia	853	-1%	842	-1%	876	4%	902	3%	929	3%	957	3%	986	3%	133	16%	2.4%
15	Spain	807	6%	827	2%	876	6%	911	4%	930	2%	939	1%	948	1%	141	17%	2.7%
16	Netherlands	675	-7%	701	4%	728	4%	757	4%	786	4%	817	4%	849	4%	174	26%	3.9%
17	Venezuela	590	-1%	500	-15%	460	-8%	446	-3%	437	-2%	433	-1%	429	-1%	-161	-27%	-5.2%
18	Sweden	561	-5%	522	-7%	548	5%	565	3%	576	2%	593	3%	605	2%	45	8%	1.3%
19	Switzerland	471	-13%	441	-6%	450	2%	459	2%	473	3%	487	3%	502	3%	31	6%	1.1%
20	Taiwan	466	5%	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	73	16%	2.5%
21	Ireland	443	-2%	484	9%	517	7%	543	5%	560	3%	571	2%	582	2%	139	31%	4.7%

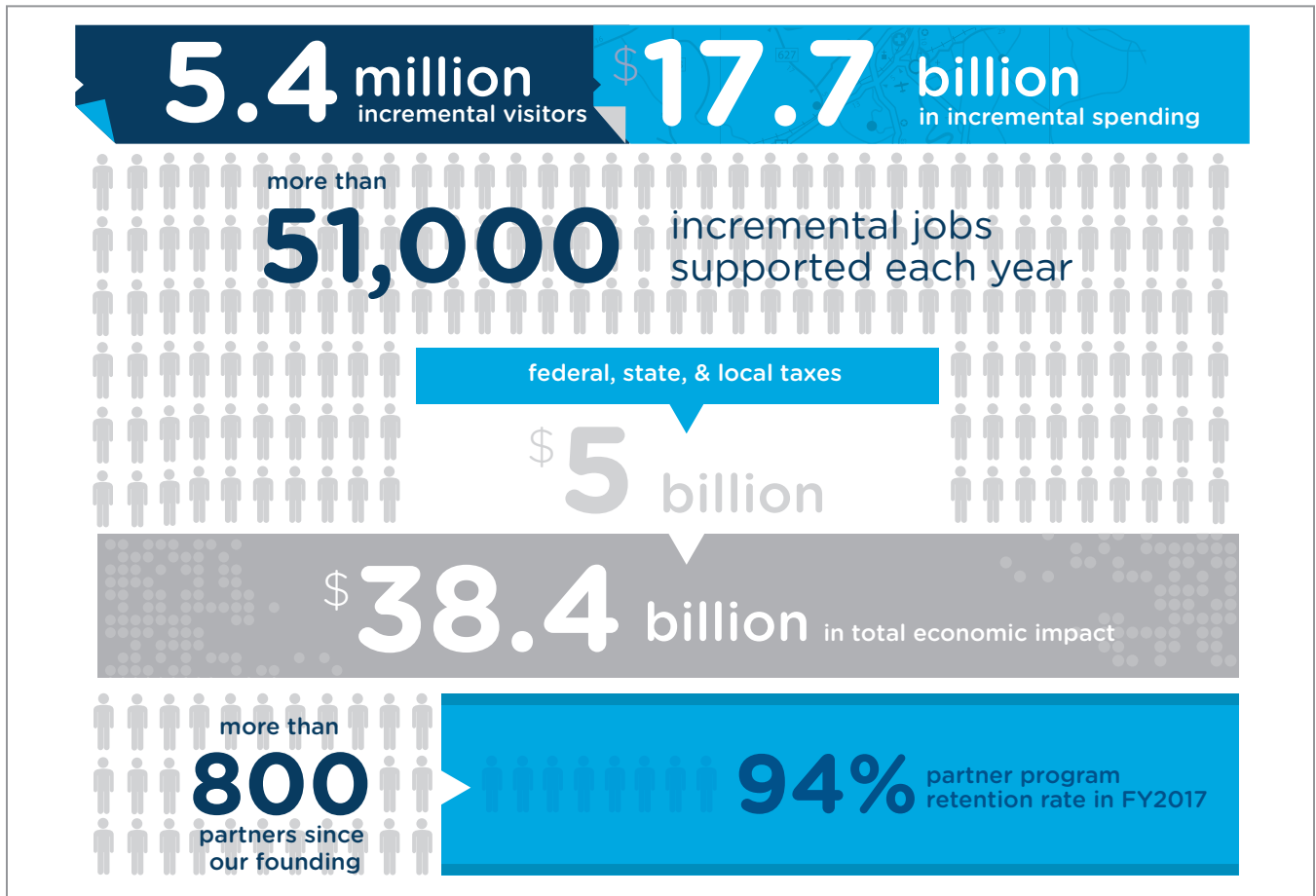
Note: Arrivals data for 2016 and 2017 have been updated to reflect the corrected arrivals data reported on September 11, 2018.
CAGR = Compound Annual Growth Rate, the average annual rate of growth over the forecast period, including compounded growth.
Overseas includes all countries except Canada & Mexico.
Sources: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office; Statistics Canada; Banco de Mexico. November 2017.

Based on the current projections for global economic growth and NTTO visitation forecasts, we continue to believe a market-specific approach to promotion is important for effectiveness. Sharing relevant, authentic stories through the lens of popular American culture and entertainment are key strategies for Brand USA marketing activities in 2019. The connection that people around the world have with American artists, entertainers, and trailblazers is a powerful platform that transcends news cycles and inspires travelers to visit the United States and experience its culture.

Unique collaborations between different cultures have long fueled the world-class creativity and artistry that have defined American culture. By sharing these stories and the destinations that have inspired them, our messaging aims to ignite an emotional connection that ultimately results in their visiting these remarkable places.

BRAND USA RETURN ON INVESTMENT

Based on the return on investment of Brand USA's campaigns, platforms, and programs over the past five years, we believe expansion of our current strategies is the best approach to realize the continued positive impact of Brand USA's globally coordinated marketing effort.



Source: ROI and economic impact data provided by Oxford Economics; partner data provided by Brand USA internal tracking.

As a result, Brand USA has established FY2019 objectives and marketing strategies that build upon the momentum of our proven, successful marketing and programming.



FY2019 Objectives

FY2019 OBJECTIVES, GOALS, AND CORE STRATEGIES

1 DRIVE RESULTS

Increase international visitation and spend for the USA, while optimizing return on investment and keeping overhead low.

Goals:

- Generate 1.30 million incremental international visitors.
- Drive \$5 billion in incremental international spend.
- Realize \$9.5 billion in total economic impact.
- Achieve marketing ROI of 30:1; overall ROI of 27:1.
- Maintain overhead below 15 percent.

FY2019 Focus:

- Continued shift to authenticity and engagement

FY2019 Strategies:

- Maximize return on investment by deploying the right messages, in the right markets, through the right channels, at the right times, and at the right levels of investment.
- Continue to shift marketing investments to the highest ROI markets (55 percent emerging / 45 percent established markets).
- Execute consumer advertising in selected markets that effectively target travelers and positively impact their intent to visit the USA (according to market prioritization and segmentation strategies).
- Focus programs in markets that drive the strongest increases in or defense of visitation, spend, and/or market share.
- Continue enhancement of global trade development strategies (international representation, product development, training, MICE, etc.).
- Continue to leverage credible voices of international influencers.
- Shift our social content strategy from creation to curation—leveraging individual voices and giving a voice to real travel experiences within the USA.
- Focus consumer public relations on driving international visitation from key source markets.
- Execute ROI study summarizing the impact of all Brand USA marketing activities.
- Enhance market profiles—combining available information from the National Travel and Toursim Office (NTTO) with proprietary research and insights to facilitate market planning.
- Continue to conduct in-market post-campaign studies and monthly brand tracking reports.
- Track and report results of all co-operative marketing programs, including segmentation by market.
- Continue to maximize and track use of our overhead to ensure the majority of our annual budget goes to effective marketing initiatives.

2 CREATE INNOVATIVE MARKETING

Promote the entirety of the USA with innovative marketing that supports all 50 states, the District of Columbia and five territories to, through, and beyond the gateways.

Goals:

- Equally market rural and urban areas as measured by the combined total of our marketing initiatives.
- Support all 50 states, the District of Columbia, and the five territories.
- Maintain destination familiarity of 93 percent.
- Increase digital marketing engagements to 52.8 million.
- Protect and maintain average intent to visit across all markets at 60 percent.

FY2019 Focus:

- Music, culture, and exploration

FY2019 Strategies:

- Develop FY2019 marketing and communications plans to promote the exceptional experiences and possibilities in the USA, the value of visiting the USA, and the welcoming nature of the United States—leveraging music, culture, and exploration as core platforms.
- Continue to promote the USA's great outdoors; neighborhoods, cities, and towns; arts and culture; culinary; and road trips.
- Promote the inherent diversity of experiences to, through, and beyond the gateways across, consumer, trade, and co-operative marketing initiatives.
- Focus on entertainment to inspire travel to the USA.
- Continue development and expansion of content and marketing—leveraging the most effective channels to reach travelers.
- Continue marketing and distribution of "America's Musical Journey" and "National Parks Adventure" plus development of a third giant-screen film focused on exploration.
- Continue leadership in high-engagement technologies.
- Add and expand new functionality to global consumer and corporate websites, including chat bots and other high-engagement applications.
- Expand marketing insights to gauge travel motivators, track sentiment, and evaluate performance.
- Sell the inherent diversity of experiences in order to fuel initial discovery, return trips, and extending the stay—with experience-first storytelling strategies.
- Leverage market prioritization and segmentation to engage travelers where they are in the travel lifecycle.

3 MARKET THE WELCOME

Inspire, inform, welcome, and thank travelers while accurately communicating vital and compelling information about visa and entry policies.

Goals:

- Deploy international arrivals program in five international arrivals halls and/or embassies/consulates.
- Expand "Ask a Local" program to include all 50 states, the District of Columbia, and 5 territories.
- Launch accessible content by year-end.

FY2019 Focus:

- Accessibility, immediacy, and education

FY2019 Strategies:

- Inspire, welcome and thank travelers, while leveraging the effectiveness of our overall destination marketing efforts through Federal resources, including embassies and consulates worldwide.
- Integrate Market the Welcome programming as part of federal partner country plans.
- Expand accessibility of consumer channels (global website).
- Continue expansion of "Ask a Local."
- Coordinate with the Departments of Commerce, Homeland Security, and State to communicate vital and compelling information regarding visa and entry policies through all Brand USA channels.
- Coordinate with the appropriate Federal agencies in our support of the objectives established by the Tourism Policy Council.
- Increase communication of practical information for trip planning across various channels.

4 BUILD AND MAINTAIN TRUST

Build and maintain trusted relationships with stakeholders worldwide through inclusive, proactive, and transparent outreach with a commitment to compliance and integrity through words, actions, and results.

Goals:

- Ensure 100 percent compliance with policies & Travel Promotion Act.
- Expand partner results reporting by 25 percent.

FY2019 Focus:

- Expanded collaboration and reporting

FY2019 Strategies:

- Increase responsiveness and reporting of partner program results.
- Demonstrate a commitment to compliance and integrity through words, actions and results.
- Increase methods and frequency of results reporting.
- Ensure full engagement with partners to maximize partner satisfaction and retention that establishes Brand USA as their go-to partner to support their international marketing efforts.
- Maintain ongoing compliance management and monitoring with appropriate policies, procedures, and controls.
- Continue to deploy and expand strategic communications, industry relations, and media relations plans that ensure consistent, accurate, and frequent updates on progress by leveraging effective communication channels and customer relationship management tools, including direct communications, social media, webinars, newsletters, meetings, and other communication strategies.
- Maintain active participation in key industry conferences.

5 ADD AND CREATE VALUE

Pioneer cooperative marketing programs, trade outreach, and other opportunities that leverage and grow the USA brand in ways our partners would be challenged or unable to do on their own.

Goals:

- Generate \$100 million in contributions from private industry and other non-federal sources (with no less than 30 percent from cash contributions and no more than 70 percent from in-kind contributions).
- Earn a 96 percent rating on partner satisfaction surveys.
- Maintain partner program retention rate of 98 percent.

FY2019 Focus:

- Innovation and leadership

FY2019 Strategies:

- Optimize cash and maximize in-kind content contributions.
- Expand sponsorship revenue streams.
- Expand program offerings for smaller destinations.
- Expand global trade strategies for product development and MICE.
- Overhaul our international trade show and outreach strategies.
- Execute partner feedback study and report results.
- Build upon the effectiveness of our overall destination marketing strategies by leveraging the strength of Federal resources, including embassies and consulates, as well as Visit USA committees worldwide.
- Time development and roll out of partner program offerings to align with partner needs.
- Continue to create new/improved product (relevant, sample itineraries, toolkits) for trade use.
- Educate and train destinations on how to build product and work internationally.
- Expand reach of the USA Discovery Program.
- Enhance the value of USA Pavilions and presence at international trade shows (right presence, right markets, and right shows).
- Continue to establish programs that allow partners to contribute and engage across all markets to leverage and promote their assets to international audiences.



FY2019 Business Plan

PLANNING APPROACH

Brand USA takes an integrated and research-driven approach to planning that starts with our value proposition that “the United States of America welcomes travelers to discover the USA’s awesome possibilities” and a three-prong messaging foundation of possibility (our brand promise), proximity (our brand value), and welcome (the message and tone inherent in all of our marketing and communications).

For FY2019, our core platform will focus on music, culture, and exploration, which will most prominently be featured in a giant-screen film and will be supported by influencer campaigns, events, and other promotional efforts. This focus will be supplemented with complementary marketing platforms that showcase the great outdoors; USA neighborhoods, cities, and towns; USA arts and culture, and USA road trips. To ensure that our efforts in each of these areas credibly resonate with travelers and are effective, our planning approach will be integrated across authentic channels that optimize return on investment.

To facilitate full integration, Brand USA has built a comprehensive content / editorial calendar to plan out our consumer- and trade-driven initiatives with quarterly and monthly themes (steeped in storytelling, educating and sharing) that will not only help increase engagement with traveler intenders to inspire international visitation to the United States, but also to help amplify the efforts of U.S. travel brands and destinations.

Strategic Integration

Marketing Positioning	The United States of America welcomes travelers to discover our awesome possibilities. The diversity of the USA’s destinations, experiences, and people is exciting and unique. The USA offers nearly limitless authentic travel experiences. Visitors to the USA have the opportunity to travel freely throughout the country and explore and discover all the USA has to offer.				
Core Platforms	Music, Culture, Exploration				
Complementary Platforms	Great Outdoors Neighborhoods, Cities, and Towns Arts, Culture, Culinary, Road Trips				
Message Foundation	Possibility (promise)	Proximity (Value Proposition)	Welcoming (Tone)		
Planning Approach	Integration, Authenticity, ROI				
Planning Tools	Research & Analytics Content and Marketing Calendar				
Marketing Segments	CONSUMER MARKETING	PUBLIC RELATIONS	GLOBAL TRADE	COOPERATIVE MARKETING	CORPORATE COMMUNICATIONS
	Consumer-driven	Consumer- and Trade-driven	Trade-driven	Partner-value, consumer-focused	Stakeholder-driven
Marketing Integration	Storytelling, Educating, Sharing				
Operational Drivers	Efficiency, Effectiveness, Compliance				

During FY2019, we will focus our efforts in the following areas across the strategic pillars that comprise our long-term strategy:

FY2019 Focus Areas

Mission

Increase incremental international visitation, spend, and market share to fuel our nation's economy and enhance the image of the USA worldwide.

Create Innovative Marketing

Promote the entirety of the USA with innovative marketing that supports all 50 states, the District of Columbia, and five territories to, through, and beyond the gateways.

FY2019 FOCUS

**Music, Culture, Exploration,
Storytelling & Many Voices**

Market The Welcome

Inspire, welcome, and thank travelers while accurately communicating vital and compelling information about visa and entry policies.

FY2019 FOCUS

**Accessibility, Immediacy,
and Education**

Build and Maintain Trust

Build and maintain trusted relationships with stakeholders worldwide through inclusive, proactive, and transparent outreach with a commitment to compliance and integrity through words, actions, and results.

FY2019 FOCUS

**Expanded Collaboration
and Reporting**

Add and Create Value

Add and create value by pioneering cooperative marketing platforms and programs that leverage the USA brand in ways our partners would be challenged or unable to do on their own.

FY2019 FOCUS

**Efficiency, Innovation and
Leadership**

Drive Results

Maximize and optimize ROI: Right messages, right channels, right markets, right times, and right investment levels.

FY2019 FOCUS

**Continued Shift to
Authenticity and Engagement**

PROMOTIONAL ACTIVITIES

During FY2019, Brand USA will continue to utilize its core program of market-driven marketing and advertising, as well as consumer and trade platforms and programs, to increase inbound visitor travel to the United States and drive tourism dollars to communities in all 50 states, the District of Columbia, and the five territories.

During the year, these ongoing programs will include the USA Campaigns, cooperative marketing, trade outreach, and media and public relations outreach that, in total, promote the United States in its entirety while adding and creating value for our partners. We will also continue to collaborate closely with our Federal partners, led by the Department of Commerce, to support their objectives to increase international visitation and spend, and to communicate U.S. entry policy.

TARGET MARKETS AND MARKET PRIORITIZATION

In order to accelerate growth in international arrivals during FY2019, Brand USA will concentrate its marketing efforts in the right markets (those with the strongest indicators of growth) at the right time (when travelers are most motivated to plan and activate travel). We will determine these markets by utilizing our market selection model that looks at 10 factors, detailed in the chart below.

Market Selection Criteria

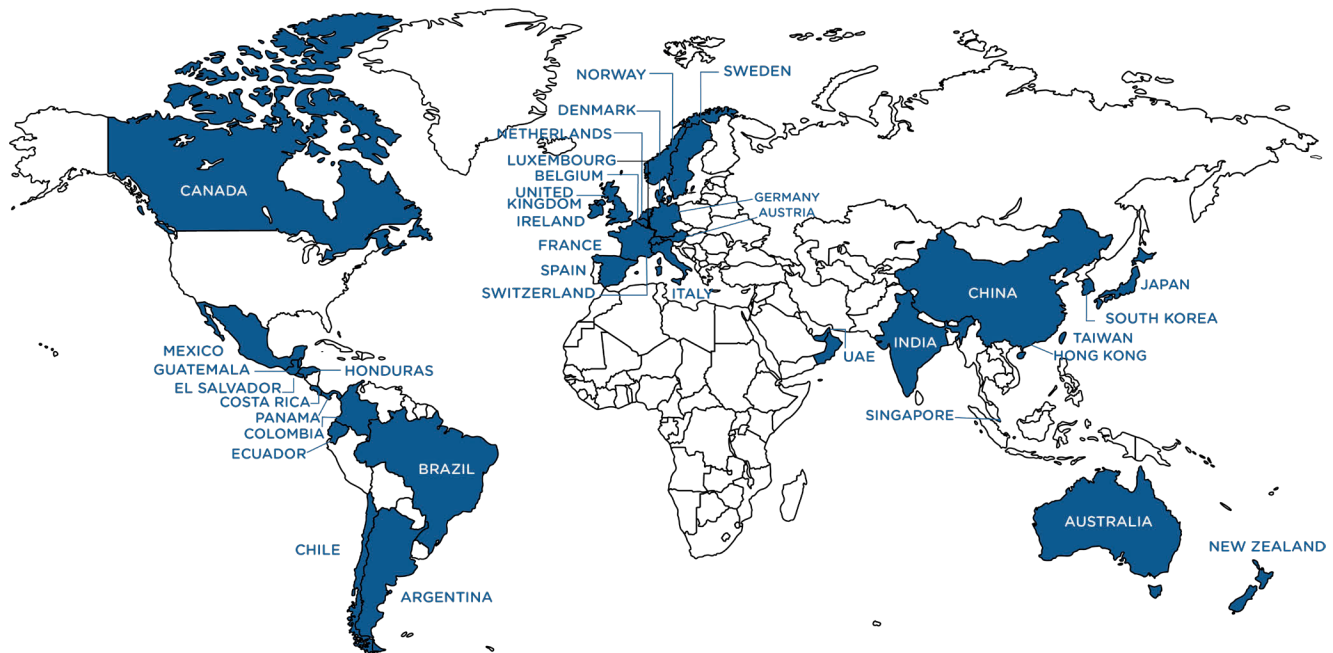


This market selection model helps Brand USA identify the markets that offer the most incremental growth potential. As we utilize this model, we see the objective of defending market share that was otherwise poised for decline equally important as growing market share. It's also important to note that this model considers international travel behaviors and macroeconomic factors most heavily, but also includes additional important factors, such as civil liberty and ease of doing business. While the model often aligns with the largest source markets for U.S. arrivals, it does not utilize U.S. arrivals as an input.

The traveler segments Brand USA targets in any given year vary by market (based on the opportunities in market). Demographically, our advertising typically targets adults aged 25 to 59 who are affluent, educated travelers. Additionally, media and messaging is aligned to market-specific characteristics, such as cultural preferences and historical response to previous advertising.

While this model enables us to define our core target markets (those that will likely drive the most visitation in the coming year), we also realize these markets are at different levels of consumer demand and commercial development—requiring a targeted and market-strategic approach throughout the year.

Based on this model, during FY2019 Brand USA will deploy its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share. In total, through the combined total of Brand USA’s cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort will be present in more than 40 markets, including:



- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- France
- Germany
- Guatemala
- Honduras
- Hong Kong
- India
- Ireland
- Italy
- Japan
- Luxembourg
- Mexico
- Netherlands
- New Zealand
- Norway
- Panama
- Singapore
- South Korea
- Spain
- Sweden
- Switzerland
- Taiwan
- United Arab Emirates
- United Kingdom

Finally, the foundation for all our marketing activities during the year will be in alignment with the appropriate stage of the travel lifecycle by market.

Travel Lifecycle



We will accomplish this by designating each market with its corresponding phases in the travel lifecycle (as depicted in the chart above) and planning consumer and trade marketing initiatives to best influence travelers at each phase.

THE USA CAMPAIGNS (DIRECT-TO-CONSUMER)

During FY2019, the core components of our direct-to-consumer USA Campaigns will run in 11 markets: Australia, Brazil, Canada, China, France, Germany, India, Japan, Mexico, South Korea, and the United Kingdom.

Additionally, Brand USA will utilize search engine marketing (SEM) to reach travelers in Chile, Colombia, and Sweden who are actively searching for USA content and drive them to VisitTheUSA.com.

Depending on the market, the main components of our USA Campaigns will include any combination of macro-level promotion and marketing messages via the channels and campaign approaches that are most effective in each market (based on “market tiers”).

Market Tiers

China	Tier 1: Fully Customized Build inspiration to make the U.S. top of the consideration set and part of the water cooler conversation. Leverage search, inspiration & consideration media, social ads, and macro influencers.
Brazil France India Korea	Tier 2: Cultural Relevance Shift destination consideration by enhancing cultural relevance; leverage search, consideration media, social ads, and macro influencers.
Australia Canada Germany Japan Mexico United Kingdom	Tier 3: Localized Global Approach Maintain the USA a part of consideration set through global campaigns, partner programs, and Brand USA originals; leverage search, activation media, and influencers.
Chile Colombia Sweden	Tier 4: Localized Global Approach Reach consumers actively seeking travel content about the USA (hand raisers) and drive them to VisitTheUSA.com; leverage base level search engine marketing (SEM).

As part of this market-tier approach, Brand USA will continue to leverage the authentic voices and power of “influencers” to reach travelers at the times and in the ways they are most receptive to marketing messaging in order to influence and re-inforce their travel decisions.

LEVERAGING MANY VOICES TO REACH INTERNATIONAL TRAVELERS

For FY2019, we are shifting our social content strategy from creating our own messages to curating individual voices that each express a particular point of view. This will enable us to give a voice to real travel experiences in the USA.

Giving a **voice** to **real** travel **experiences** within the USA

Create urgency and provoke "travel dreaming" by highlighting first person perspectives of local, expert influencers and travelers alike.

Open access and lends authenticity to our communications, as well as creating a sense that there are many United States.

Incorporate and builds on our foundational value proposition (proximity), competitive edge (possibility) and tone (welcome).

By utilizing this approach, we will be able to achieve more organic, authentic, locally relevant, positive, and cost effective engagements with international travelers.

The *Many Voices* Platform

"Many Voices" will be the social media and content communications platform Brand USA uses during FY2019 in order to create more meaningful connections with potential travelers. This platform will stimulate curiosity and a desire to visit the USA by leveraging a collection of voices which define the story of the USA. Together these voices will help travelers see that the USA is a collection of places, and experiences whose spirit is found in its diverse range of people. Their message to travelers is this: We aim to guide you and to show you that behind every landscape, big city and open road there are many voices that will stimulate your desire to travel—and to choose the USA for you next travel experience.

Who are the Many Voices?



LOCALS

A place is defined by its people, by those who have explored its culture, roads and trails like no other. They've made their mark on their community and can welcome you, inspiring you to visit like no other.



VISITORS

They've fulfilled their wanderlust, checked their bucket list, and created memories which can now be used as inspiration for the next iteration of travelers from their market. To travel is to know and the past visitor now becomes the storyteller and the evangelist for travel to the USA.



CATEGORY EXPERTS

Whether you're an aspiring explorer, reading National Geographic, dreaming of your chance to conquer the Grand Canyon, or a foodie looking for inspiration, planning your next culinary journey to LA - travelers often look to category experts to inspire their travel decisions. We will use them to guide our community.



CREATIVE CLASS

Not everyone looks at America in the same way. Interpretations can be found in music, art, and unique takes on photography and video. We want to amplify these creative voices to show America as it hasn't been seen before. This creative perspective can come from locals, visitors or category experts

FY2019 CONTENT THEMES

To help focus our content curation throughout the year, we have created the following themes by quarter. While during any given quarter, content will be varied, the major focus during each quarter of the year will primarily consist of local perspectives, arts and entertainment, and exploration—with these themes most prominently featured as follows:



Q1 AND Q2 FY2019 LOCAL PERSPECTIVES

Some of the most memorable travel moments are the ones which begin with a human connection. It's the conversation with a barista which leads us to a hiking trail not found in any guide book, or the musician who points you to the best diner for local cuisine. Those authentic, off-script, true experiences are what the USA is all about. And it's connections with welcoming locals that bring the real America to life.



Q3 FY2019 ARTS & ENTERTAINMENT

The spirit of America is the sound of music pouring onto the streets. It's the live music capitals and music festivals that can be found in cities large and small that bring people of all backgrounds together. Its culture, art and history are preserved in museums, theatres and art galleries across the USA. America invites you to hear, see and experience first-hand the arts and entertainment of the USA.



Q4 FY2019 EXPLORATION

Exploration is an outlook, not an action. It is a personal travel journey, which ranges in experiences. It is a hiker, trekking through some of America's wild spaces, or an urban explorer's multi-sensory journey through America's cities. Exploration is a platform which embodies the American spirit - a spirit of trailblazers, innovators and self-discovery.

Screen Strategy and Storytelling Platforms

During FY2019, we will continue to utilize our successful storytelling approach to distribute content and make it accessible to travelers throughout the world from mobile to the giant screen and everything in between. Our ongoing call to action: Visit the USA.



Mobile



Laptop/Desktop



Smart TV



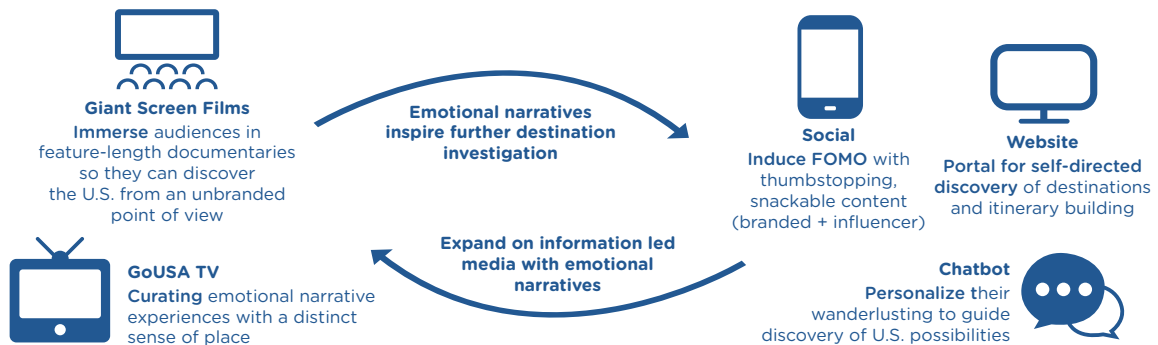
Digital OOH



Giant Screen

Our evolving strategy throughout the year will be on deeper storytelling leveraging our authentic “many voices” platform in those moments when people are most interested and receptive to content.

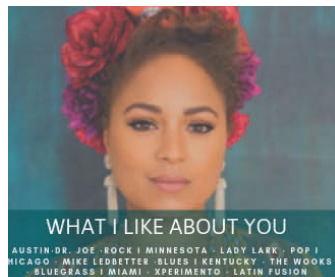
The elements within our multi-screen, video storytelling strategy create a positive inspiration feedback loop that delivers the right content to the right consumer in the right place—with foundational messaging that focuses on possibilities (the promise), proximity (the value proposition), and the welcome (the tone).



Global Campaigns

During FY2019, Brand USA will showcase the following global campaigns to promote its core platforms of music, culture, and exploration:

Hear the Music, Experience the USA



Launched in FY2018 with one song and five artists promoting five U.S. destinations, this year the “Hear the Music, Experience the USA” campaign will expand to 10 artists from 10 cities covering two classic American songs - *Boogie Shoes* and *What I like About You*. Featured artists will inspire travelers to explore the sights, flavors, and hidden gems of the cities that have inspired their unique musical perspectives.



MUSIC CAMPAIGN ECOSYSTEM

In addition to Hear The Music and American Sound - the broader Brand USA ecosystem will feature content which ladders back to the music vertical through a varied approach inclusive on content partners (Beautiful Destinations) and influencers.



CAMPAIGN LAUNCH TIMELINE*

**Subject to change*

January: Organic Social and Web Site launch

February: United Kingdom, France, Germany, Canada, Australia, South Korea

March: Brazil, Japan

April: China



MEASURING SUCCESS

Video Views

Website Visits

GO USA TV Views/Downloads

Increased Affinity (FB Brand Lift Study).

This campaign will be integrated across all of Brand USA’s marketing segments:

- Our Visit the USA websites will host a robust music hub to help inspire travelers to explore the USA to, through, and beyond the gateways in and around the featured destinations.
- To reach the travel trade, we will create unique itineraries inspired by the featured artists’ points of view.
- Through public relations and other earned media efforts we will promote the USA through key events and interviews with the artists.
- Our social campaigns will incorporate a video-first strategy with sequential targeting to help tell the full story of the artists and the destinations.
- GoUSA TV will house longer-form, American Sound episodes.
- Sponsorships with Spotify and other in-market activation partners will help us create deeper storytelling to inspire travelers to visit the USA.

Ask a Local



During FY2019, we will continue to build out our “Ask a Local” campaign to send one big welcome to international travelers to visit the USA. “Ask a Local” uses a documentary-styled approach to sharing amazing travel experiences through the voices and faces of real U.S. residents (not actors) who provide their first-person recommendations for where to have the most authentic travel experiences throughout the 50 states, 5 territories, and the District of Columbia. Locals provide their fun and unique perspectives on where to best experience local attractions, food, nightlife, music, and scenery.

These short-form videos can be accessed through our new “Ask a Local” consumer pages on VisitTheUSA.com with homepage and state modules, on GoUSA TV, and on TheBrandUSA.com.

Production phase 1 included 25 states/territories featuring 65 cities. Production phase 2 included 31 states/territories featuring 60 cities. During FY2019 we will complete coverage of all 50 states, the District of Columbia, and the five territories, and will continue to build segments on cities and towns across the USA.

Beautiful Destinations Partnership (Always On Content)

During FY2019, Brand USA will continue its partnership with media company Beautiful Destinations to engage international travelers through the sharing of authentic, inspirational, and immersive travel stories. Voted by Fast Company as “One of the World’s Most Innovative Companies” in 2017, Beautiful Destinations has built the largest millennial travel community on social media—spanning more than 20 million people across 180 countries—by creating and distributing “social first” content featured on Instagram, Facebook, Snapchat, YouTube, and Weibo.

In FY2018, Beautiful Destinations created the “cinemagraph” as part of its support of Brand USA’s social media channels—streaming “always-on” content that is core to Brand USA’s social-media efforts to continually promote the vast range of U.S. travel destinations and experiences. The vivid, compelling imagery promoting the USA that Beautiful Destinations has distributed across the largest social media channels in the world inspires travelers with a diverse and abundant reservoir of USA trip ideas.

Mobile Content Studio

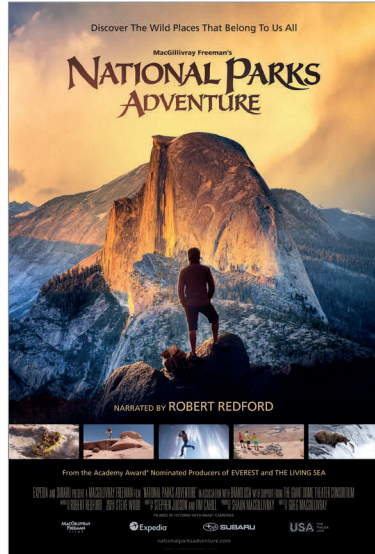
During FY2019, Brand USA will work with Beautiful Destinations to create an innovative, first-to-market approach at real-time content creation with a mobile content studio. The Brand USA/Beautiful Destinations mobile content studio will become an evergreen explorer of the USA - traveling from town to city to great outdoors telling the story of America in a way never done. Laddering back to our exploration/trail blazer concept, the studio will not only produce impactful content, it will have massive earned media value, while creating partner opportunities by allowing us to create content at scale.

Editorial Content and Timing

Timing	Q1/Q2 Local Perspectives	Q2/Q3 Arts & Entertainment	Q4 Exploration
HUB	<p>“Best Of” - Beautiful Destinations will feature the best of a handful of U.S. cities through a combination of video and still imagery, with a focus on exploring emerging tactics such as IGTV.</p>	<p>Musical Cities - Beautiful Destinations will create an extension of hear the Music focusing on exploring cities that are synonymous with their musical cultures (Memphis/Blues, Nashville/ Country etc.)</p>	<p>Thematic Road trips - Beautiful Destinations will explore the idea of themed journeys that steer away from the iconic American Road trip focusing on areas like Civil Rights Trail, or Bourbon Trail, Fall Foliage or Chicken Wing Trail.</p>
Concept	<p>Local Perspectives Concept: To inspire international audiences to travel to the USA to discover its hidden gems, we will champion the locals who know their towns, cities, and states best. These category experts will share their unique perspectives and experiences, giving users a refreshed and accessible view of American culture, breaking perceptions and stereotypes along the way.</p>	<p>Musical Cities Concept: Music is woven into the fabric of the USA, generating a national soundtrack as diverse as the communities who created it. Brand USA will share the sounds of America with the world through the perspective of different artists whose work is inspired by and tied to their local community. Focusing on one of five different themes — homegrown, history of instruments, festivals, live, and genres — we’ll enable a global audience to see and learn about different parts of America through the universal language of music.</p>	<p>Thematic Road trips Concept: Road trips are a symbol of America. While they never lose their splendor, iconic drives like Route 66 and PCH have been explored extensively. In this series, we will discover the under-discovered — taking Brand USA followers on new and niche journeys across the USA.</p>

Cinematic Film Production with MacGillivray Freeman Films

While we continue to promote and expand distribution of our first two giant-screen films, “National Parks Adventure” and “America’s Musical Journey,” we also will continue production of our third film to promote exploration and the trailblazing spirit of the United States.



Cinematic film production has proven to be our highest ROI generating marketing efforts. In fact, based on a study by Oxford Economics, “National Parks Adventure” is estimated to have generated 46,710 trips to the USA, \$173 million in visitor spending, and a total economic impact of \$376 million in FY2017.

During FY2019, we will again conduct an ROI study to analyze the economic impact of “America’s Musical Journey.” During FY2019, we will introduce the film in new markets and expand theatrical distribution in certain markets where the film is already showing, as well as distribute the film globally via streaming apps, connected TV devices, and in-flight entertainment systems.

Our third film, which currently has as its working title “Exploring America,” will be our highest-profile marketing effort focused on exploration. Production will complete during FY2019, and distribution in theaters will begin during FY2020.

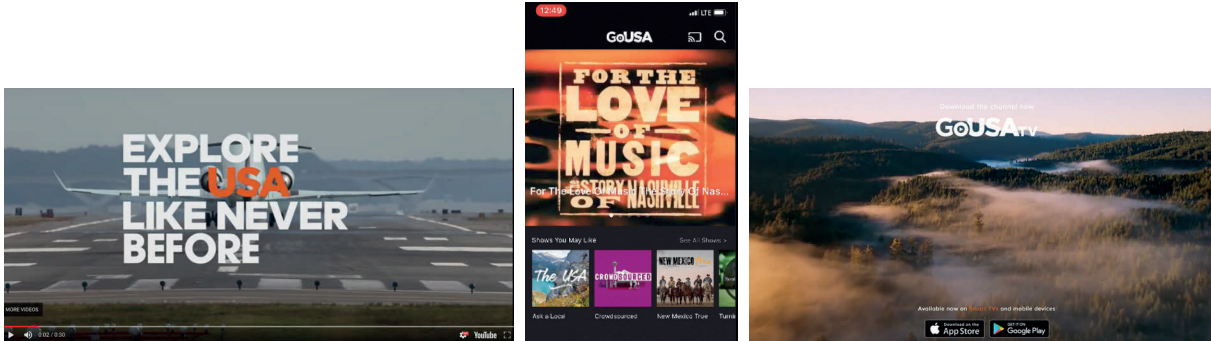
EXPLORING WILD AMERICA

When the first courageous people came here, they didn't know what they would find. But they came, using their wits to make their way. Today, we still go out into the unknown. Even with all her great cities, America is still a place where the great outdoors lies waiting for the next explorer. Exploring America (WT) a giant screen film, brings to life trails and trailblazers by sharing stories of the great outdoors, the discovery of some new cities, and people who overcame failure and found a way to bring their dreams to life. America has always been a wide open, and diverse place; culturally and geographically.

The banner features a dark teal background with a silhouette of a hiker on the right and a forest scene on the left. The text is centered in white.

GoUSA TV

We've already seen the power our giant-screen documentaries have to drive travel to the United States. The launch of the GoUSA TV channel is an extension of that strategy to immerse audiences in an entertainment-led point of view of the USA. GoUSA gives us the space to create, curate, and collaborate on the production of content so we can better harness the power of entertainment to get people to actively consider the USA for their next international trip.



We officially announced the launch of GoUSA TV in November 2017—with access soon available on over-the-top (OTT) platforms Roku, Apple TV, and Amazon Fire TV in March 2018.

During FY2019 we will expand GoUSA TV content and distribution via associated iOS and Android smartphone apps, as well as leverage our partnership with the National Football League (NFL) to promote GoUSA TV as part of our sponsorship of the NFL UK London Games Kickoff Concert in October 2018.

New programs and episodes will be added to GoUSA TV every Thursday, with additional programming added on other dates in connection with specific campaign launches.

The channel will be promoted with a consumer campaign (launched in October 2018) inclusive of social video assets, bespoke itineraries, and Instagram Stories from 11 featured markets.



MUSIC CAMPAIGN ECOSYSTEM

Similar to our other music campaigns, “America’s Musical Journey” launches will be supported by our broader music content initiatives that will live across our digital and platform ecosystem that will include our “Hear The Music” American Sound campaign, “Musical Cities” content series and influencer campaigns around music.



KEY LAUNCH MONTHS*

**Subject to change*

November: Australia

December: Mexico
Cinopolis Launch

March: Germany

April: Brazil

May: China

September: India plus
distribution via connected TV
and streaming



MEASURING SUCCESS

- Film viewership
- Trailer viewership
- Earned media reach
- Ticket revenue
- Partner engagement
- Marketing and economic return on investment

Core Digital and Social Media Channels

The USA Campaigns will be further supported by our core digital platforms and social media channels as described below.

Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which is active in most markets where Brand USA markets the United States to international travelers
- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States.

Social Media Channels

In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA will leverage related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles will be used for global, consumer-facing promotions in English:

- Website: VisitTheUSA.com
- Twitter: @VisitTheUSA
- Facebook: Facebook.com/VisitTheUSA
- YouTube: YouTube.com/VisitTheUSA
- Instagram: VisitTheUSA
- Google+: Google.com/+VisitTheUSA

The following campaign hashtags support global and thematic promotions and initiatives:

- Global: #VisitTheUSA
- Flavors/Culinary: #TasteUSA
- Road Trips: #RoadTripUSA
- Great Outdoors: #OutdoorsUSA
- Market the Welcome: #USAWelcome

In addition to leveraging these global channels, Brand USA will continue to reach and engage travelers through localized social media efforts in the following markets via the channels shown in the chart below.

Digital Channels

MARKET	URL	LOCAL TAGLINE	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAcl	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	n/a	Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn Youku (YouTube equivalent): http://i.youku.com/gousacn Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局			
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAco	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAfr	@VisitTheUSAfr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUSAde	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAde
India	GoUSA.in	Plan Your USA Trip Now	facebook.com/GoUSAin	@GoUSAin	#VisitTheUSA	VisitTheUSA	YouTube.com/GoUSAin
Japan	GoUSA.jp	今すぐ USAへの旅の計画を	facebook.com/GoUSAjp	@GoUSAjp	アメリカ旅行	VisitTheUSA	YouTube.com/GoUSAjp
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	facebook.com/VisitTheUSAmx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	facebook.com/GoUSAkr	@GoUSAkr	#미국여행	VisitTheUSA	YouTube.com/GoUSAkr
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUSAse	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Taiwan	GoUSA.tw	立即訂製專屬你的美國之旅	facebook.com/VisitTheUSA	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	facebook.com/VisitTheUSAuk	@VisitTheUSAuk	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA

Media Plan

During FY2019, our media and messaging will continue to be topical, timely, and engaging.

We will make sure our media and messaging is topical, timely, and engaging. To that end, our approach to media planning and buying for the coming fiscal year will be a collaborative effort with our partner and global trade marketing teams, to identify key opportunities in each market and affect more efficient spending and more relevant content.

The media mix will be determined on a market-by-market basis, based on opportunity. The current media plan is shown in the chart below.

FY2019 Media Markets

(subject to change)

FY2019	OCT	NOV	DEC	JAN*	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Australia												
Brazil												
Canada												
China												
France												
Germany												
India												
Japan												
Mexico												
South Korea												
United Kingdom												
INFLUENCER THEMES	Neighborhoods			Culture & Entertainment			Road Trips			Great Outdoors		

KEY:



NOTES:

1. January Inspiration Activation;
2. China drive periods Chinese New Years, Summer Vacation and Golden Week;
3. Always-on Search: Chile, Colombia & Sweden

*Above The Line (ATL) is an advertising term that refers to traditional mass media, including cinema, television, radio, out-of-home and print. Each of these outlets requires a slightly different creative and messaging approach.

*On Line Video (OLV) is one of the fastest-growing content platforms in the world and paid media channels like YouTube, Facebook, Youku and IQiyi have billions of followers. This digital approach is increasingly mobile-focused, and uses a different approach to story-telling than typical traditional "TV."

COOPERATIVE MARKETING (CONSUMER-FOCUSED)

During FY2019, Brand USA will continue to leverage cooperative marketing programs to reach travelers in more than 40 international markets.

Brand USA Originals

Brand USA Originals are cooperative marketing programs developed and offered exclusively by Brand USA. They include proprietary programs developed by Brand USA and those created in partnership with influential travel media and major travel and lifestyle brands. Included in these offerings are market-specific programs where Brand USA connects partners with its in-market experts to ensure cooperative marketing efforts are deployed in the right markets with the right messages, at the right times. Programs are designed for either partner launch or expansion in established or emerging markets. These programs are ideal for cities, states, and attractions focusing on specific markets or entering a market for the first time.

Hear The Music

The Hear the Music program aligns with Brand USA's music and entertainment strategy, featuring video vignettes and dedicated city guides featuring local musicians who showcase multiple destinations' cultural diversity and unique visitor experiences. This long-form content will be featured in a compilation episode called "American Sound" on GoUSA TV, and all destination vignettes will be hosted on the VisitTheUSA.com music hub.

**This is a global program with market-specific amplification in Australia, Canada, Mexico, and the United Kingdom*

Film Premieres & Experiential Events

Partners can gain international exposure for their destinations and unique music heritage through film and event sponsorship opportunities related to the launch of "America's Musical Journey." Sponsorship opportunities include the ability to invite stakeholders and VIPs to experience a destination, as well as creative branding elements.

GoUSA TV

GoUSA TV is a first-of-its-kind, connected TV network featuring best-in-class video content that inspires travelers to visit the USA. GoUSA TV is available on Roku, Apple TV and Amazon Fire TV; the GoUSA TV smartphone app will launch in 2019. Partners who have video content they would like to submit for distribution on GoUSA TV can reach out to GoUSATV@TheBrandUSA.com for more information.

USA Discovery

The USA Discovery Program is Brand USA's official online travel agent training tool about the diverse destinations and experiences available in the U.S. to inspire and help the travel industry get accredited as USA Specialists. Agents learn geographical information on U.S. regions, as well as individual states and territories, to become a Regional Expert. Agents can then earn special badges as well as bespoke partner badges. Unique features of the program include MegaFam integration, live events & webinars, and peer-to-peer learning.

Tour Operator Program

In Spring 2018, Brand USA launched phase one of a digital tour operator campaign aimed to inspire travel to the U.S. and specific destinations within the market, as well as drive sales through key tour operator and airline partners. Featured destinations received a bespoke destination-specific, content-rich digital lightbox hub, served via ad units in premium news and travel sites in the United Kingdom, such as The Telegraph, Times

Online, Guardian, Wanderlust, and TripAdvisor. Building off the strong success of phase one, Brand USA is excited to announce an international expansion of the program and the kick-off of phase two in January 2019, which offers packages in Brazil, France, Germany and the United Kingdom.

Expedia Sound Travels

In 2018 Brand USA and Expedia created "Sound Travels," an integrated marketing campaign utilizing 3D audio to promote international travel to the U.S. The first 3D audio campaign from Expedia Group Media Solutions, "Sound Travels" features a bespoke, interactive content hub that brings the vibrancy and diversity of the U.S. to life through immersive 3D audio experiences, and inspires potential travelers to explore, plan, and book a trip to the dynamic destination. Part of a multi-year campaign to promote international travel to the USA, "Sound Travels" will continue in three key markets in FY2019: Canada, Mexico, and the United Kingdom.

Digital Marketing Programs

VisitTheUSA & GoUSA Websites

VisitTheUSA and GoUSA in-language consumer websites are designed to inspire international visitors and travel influencers to choose U.S. travel destinations, travel providers, and experiences via compelling content and helpful travel information. Partners can work with Brand USA to develop content on City or State Pages and share the best of a destination through Experience and Trips Pages, which provide international travelers a closer look at U.S. destinations, travel brands, or organizations. Brand USA's consumer websites are geo-targeted for Australia, Brazil, Canada (English- and French-speaking), Chile, China, Colombia, France, Germany, Hong Kong, India, Japan, Mexico, South Korea, Sweden, Taiwan, and the United Kingdom—making them particularly effective at reaching consumers.

In 2017 Brand USA launched new global websites integrating targeted content strategy, dynamic taxonomy and state-of-the-art design. All programs include translation services for 15 sites, in 8 languages, including Simplified Chinese for Mainland China, as well as traffic-generation programs that maximize engagement. All partners benefit from Brand USA's strategic approach to incorporate partner content into each in-market campaign, maximizing the impact of a destination's story.

- **Destinations:** This is the perfect program for showcasing state and city destinations with features such as a photo gallery, video, and attraction and related experience modules that keep users exploring the destination's unique stories.
- **Trips:** This is the ideal space for regions, states and cities to come together to showcase trips featuring overnight stays in multiple destinations.
- **Attractions:** This content development and activation program includes TripAdvisor campaigns as well as custom Experience content on the VisitTheUSA websites.
- **Experiences:** This program is designed for cities, attractions and other travel partners to create robust, multimedia content that tells their story and benefits from organic and paid marketing strategies.
- **Customized Website Option:** Custom-content websites hosted on VisitTheUSA.com to maximize exposure and gain efficiencies on site upkeep and maintenance.

Media Opportunities (China)

Brand USA will work with partners to promote destinations and travel opportunities to travelers in China and via dedicated media campaigns. These campaigns leverage Brand USA's relationships with top media channels in market to drive traffic to destination and travel content on GoUSA.cn and partner sites.

Video Creation & Distribution

In FY2019, Brand USA will offer partners the opportunity to promote their destinations and experiences with videos designed to increase consumer engagement by delivering stories to targeted international audiences.

Since, on average, over 80 percent of international Internet users watch video, Brand USA has developed the following video program opportunities and options:

- **Road Trips:** Road Trip videos place the viewer in the driver's seat, highlighting the traveler's perspective and capturing experiences that are high-energy, personal and memorable.
- **Destination-at-a-Glance Videos:** Short, dynamic vignettes about a city or region inspire international travelers who are actively planning their vacations.

Brand USA also offers third-party distribution options to expand the international market reach of any of the above videos. Opportunities are available with Rocket Fuel, Facebook, and Outbrain/Taboola.

*Target markets include Australia, Canada, Chile, China, France, Germany, India, Japan, Mexico, Sweden, and the United Kingdom.

International Search Engine Marketing Program

Search engine marketing is a key component of Brand USA's international marketing efforts to maximize the exposure of destination and travel opportunities to international travelers. Through this targeted and fully managed program, Brand USA helps participating partners engage more international travelers to visit the USA.

Global Inspiration Program

Inspiration Guides

Brand USA's Inspiration Guides, *Visit The USA*, help attract visitors from the most valuable international markets to U.S. destinations through a smart mix of online and print exposure. Brand USA leverages these upscale guides to present U.S. travel experiences with stunning photos and enticing copy, as well as in featured photo essays showcasing destinations and travel brands.

In 2019 Brand USA will continue to evolve the content and distribution strategies for the Inspiration Program to target more international consumers and the travel trade through digital and in-person channels. More than 465,000 guides—created in 13 language editions—will be distributed to more than 24 international markets. Interactive digital editions with live links will be created for each edition. The combined global digital distribution will provide a minimum of 50 million promotional impressions.

Brand USA understands that more and more travelers research and consider travel experiences through digital media, leading to the introduction of a new, mobile takeover ad unit for the 2019 guide. The ads will reach carefully selected consumers through sophisticated targeting strategies, driving them to destination content online.

Multi-Channel Programs

Brand USA's Multi-Channel Programs deliver extraordinary value compared to similar targeted international campaigns created by individual destinations. Using robust digital, print, social, and video storytelling, and a results-driven activation campaign, Brand USA ensures targeted messages reach international travelers via the media they consume most during the times they're most likely to be planning and booking travel. Customized calls-to-action take consumers from the Dream to Consider to Activate phase of the travel lifecycle—generating measurable results.

In select markets, Brand USA's multi-channel campaigns are evolving to offer innovative marketing opportunities, creating deeper engagement with destination content. Through a new, custom mobile-first takeover unit, destinations will be able to tell their story in a more immersive way and the content will be dynamically served to more precisely and effectively identify users most likely to engage with the messaging and take action.

The flexibility of these programs allows Brand USA to take a strategic approach by:

- Supporting the efforts of top travel trade operators of U.S. destinations
- Leveraging Online Travel Agent (OTA) activation through Expedia (in all markets except China)
- Directing traffic to destination and travel experience content from Brand USA's platforms

Value, flexibility, and a multi-funnel strategy are cornerstones of the program, which includes customized campaigns by market (Australia, Brazil, Canada, China, Germany, India, Japan, Mexico, and the United Kingdom).

Global Marketing Programs

STA Travel

Brand USA and STA Travel continue to offer multi-channel campaigns targeted to the youth traveler. This partnership opportunity includes digital media, point-of-sale marketing, and social media.

Thomas Cook

Thomas Cook and Brand USA will continue to offer their unique, multi-channel marketing technology platform, "USA Everywhere," in 2018. The platform houses all of the data from previous partnerships, as well as market insights and data on millions of Thomas Cook customers who are likely to book travel to the United States. The platform reaches millions of consumers across 16 European markets and China who are "live" in the market for a vacation, putting destination and experience content in front of these highly-qualified customers on Thomas Cook's e-commerce sites, in-store, and in front of travel agents themselves.

BBC International

BBC will continue its exploration of the USA using music as a unifying theme. The program will offer digital and television advertising opportunities on BBC's global broadcast feeds.

Euronews NBC

Brand USA and Euronews will take viewers on an immersive musical journey in “Notes From the USA.” We will travel to diverse cities across the USA and tell music stories with the help of our musician presenters. The 10-episode series will air in 2019 across Euronews’ network reaching 155 countries in nine languages. The program will offer digital and TV advertising opportunities.

Thematic Marketing Programs

Entertainment & Culture

In February 2018 Brand USA released its second giant-screen documentary, “America’s Musical Journey,” with rave reviews. This new movie explores local culture and experiences across the country, as told through the language of music, featuring popular musician Aloe Blacc as the storyteller.

Brand USA’s music and entertainment initiative is a global program designed to thematically align with the film, highlighting the people, places and sounds that define destinations across the U.S. and effectively extend marketing reach through development of high-quality, music-themed content and a targeted distribution strategy.

Culinary

Through a multimedia storytelling campaign that includes dynamic digital content, engaging video, and a targeted social campaign, Brand USA’s culinary initiative is designed to increase visitation to the USA by showcasing new ways to discover and indulge in the USA’s range of culinary experiences. Brand USA’s VisitTheUSA and GoUSA websites provide a place to showcase U.S. destination and trip experiences content and act as a go-to resource for international travelers looking to learn more about the cuisines, restaurants, food festivals, and chefs of the United States.

An exciting new opportunity to feature destinations and the foods that are unique to them is through the Roadfood™ series on GoUSA TV. Roadfood™ is the authority on great regional meals along highways, in small towns and in city neighborhoods, and is famed for celebrating regional and small-town eateries and sleeves-up food made by America’s culinary folk artists.

Attractions & Experiences

As part of an exciting new program designed specifically to promote U.S. attractions and experiences, Brand USA is partnering with TripAdvisor, a trusted source in international travel planning, on a new activation and content development platform. This integrated campaign includes custom user-generated display ads on TripAdvisor. Partners that currently work with Viator will have access to the booking data and back-end measurement tool.

Brand USA will create content about U.S. attractions for VisitTheUSA websites, with enhanced Experience Pages and content marketing, plus exposure in an upcoming multi-channel campaign.

TripAdvisor media flights are available in key international markets, including Australia, Canada, Germany, Mexico, and/or the United Kingdom with ongoing presence on Brand USA’s global consumer sites.

Market Specific Programs

Brand USA Market Specific programs focus on reaching international travelers from a core set of designated markets. By working with leading media and trade industry partners in each market, Brand USA is able to promote destinations and travel experiences to effectively and efficiently reach travelers in specific target markets. By leveraging proven and powerful promotions, these programs are an ideal way to promote destinations and experiences on an international market-by-market basis.

For FY2019, Market Specific programs are available in the following markets: Canada, China, and the United Kingdom. Details on Market Specific programs can be found online at TheBrandUSA.com/partners/programs/consumer-co-op.

"I Know This Spot" China Influencer

Brand USA is partnering with leading Chinese influencer Jessica Beinecke to bring destinations the unique opportunity to participate in the "I Know This Spot" Chinese-English digital travel series. More than just a travel video in Chinese, these digital videos bridge cultural and language barriers and create exciting local experiences for Chinese tourists.

News UK

News UK is home to some of the biggest and most popular British newspapers. *The Times* and *The Sunday Times* are among the world's best-known quality newspapers, and *The Sun* remains the most read British newspaper with more than seven million readers each day.

The News UK/Brand USA program opportunity will span *The Times* and *The Sunday Times*, *Storyful* and *Unruly*.

JCDecaux

JCDecaux is the number one outdoor advertising company in the world. Together, Brand USA and JCDecaux will utilize the most sophisticated out-of-home infrastructure to promote U.S. destinations, targeting the UK's young, affluent and urban population.

Rogers Media

Rogers Media is the leading communications and media company in Canada. This new program features a multi-platform advertising campaign across the vast Rogers Digital Media Network and Rogers' dynamic TV programming on City TV.

FlightNetwork

Reach the Canadian market using FlightNetwork, the largest online travel agency that is both owned and operated in Canada. This new program utilizes FlightNetwork's ability to drive flight bookings using targeted advertising to deliver high-impact marketing across display, email, and social advertising.

Brand USA Affinity Programs

Affinity programs are cooperative marketing programs Brand USA has developed with media, online travel agencies (OTAs), or other travel-related publishers to advertise and promote U.S. destinations, experiences, attractions, and other travel opportunities. They are a particularly valuable way to highlight partner offers and activate USA travel experiences.

During FY2019 Brand USA will continue to work with the following cooperative marketing partners to promote travel to the USA.

Expedia Group

Expedia Group Media Solutions gives marketers unprecedented exposure to one of the world's largest online travel audiences, connecting brands with highly-qualified consumers shopping for travel. Through innovative solutions that go beyond traditional online advertising, Expedia Group helps marketers reach international travelers during all phases of the travel planning and booking cycle.

TripAdvisor

As the largest online travel site in the world, with 20 travel brands, TripAdvisor offers destinations and organizations a significant opportunity to generate a global presence in 49 countries and 29 languages. Each month, TripAdvisor reaches 455 million travelers who are actively researching and planning travel.

Essentially America

Essentially America is a leading international consumer travel magazine about the USA that is printed and distributed in multiple languages. Current opportunities are available in China, Germany, and the United Kingdom.

Sojern

Sojern has specialized in travel path-to-purchase data for over a decade. Their travel engine analyzes 500 million unique traveler profiles and billions of predictive purchase signals to activate multi-channel marketing solutions and drive brand influence, direct bookings, and incremental visitation. Sojern is the first and only travel-specific company to be named a DoubleClick/Google Certified Marketing Partner.

Sojern works with over 800 top travel brands globally and their global footprint provides scale across 200 countries. Sojern campaigns include detailed post-campaign analytics reporting that tracks everything from clicks, search, and booking data all the way down to economic impact for destinations.

ADARA

Brand USA works with ADARA to promote destinations to the world's largest audience of travelers—over 500 million monthly across the Americas, Europe, the Middle East, and Asia Pacific who use ADARA in their travel planning. Powered by partnerships with more than 90 global travel brands, ADARA transforms loyalty, search, and booking data into actionable knowledge, allowing destination marketing organizations (DMOs) to better understand, reach, and engage travelers. ADARA helps destinations acquire high value visitors and active repeat visitors and fully understand their best customers and prospects.

TRADE OUTREACH

During FY2019 Brand USA will continue to participate in numerous trade outreach initiatives. We will coordinate much of this activity with an expansive network of international representatives, Visit USA and Discover America committees, travel and tourism advisory boards, and U.S. Commercial Service teams around the globe.

Through Brand USA's trade outreach efforts, partners will be able to connect with key travel trade influencers who book travel to the USA. From access to thousands of leading travel buyers and influencers at USA-branded pavilions during large-scale trade shows, to the opportunity to connect with travel professionals in one-on-one sessions during sales missions, to our ever-popular MegaFam trips promoting U.S. destinations, travel brands, and attractions to, through, and beyond the gateways, Brand USA's trade outreach programming will help inform and motivate travel buyers around the world. These interactions will provide partners with valuable and direct exposure to the travel industry's most influential professionals.

Key components of our plan for the year include:

- Expanding our travel trade engagement efforts to connect destinations and attractions with key members of the travel trade in our target markets through sales missions, B2B sessions, and MegaFams, as well as a new initiative—Brand USA Travel Week.
- Providing additional resources to the travel trade—including the USA Discovery Program, training seminars, and toolkits
- Building upon our strong international presence
- Continuing to expand product development by building out additional USA itineraries
- Supporting destinations with market entry and readiness programs

Trade Shows

Throughout the year, Brand USA will host a series of USA-branded pavilions at influential travel and trade shows—providing participating U.S. exhibitors the opportunity to reach 1.6 million international travel buyers and sell future travel to the United States.

Brand USA will serve as the unifying element at these shows, representing U.S. travel and tourism interests on a global scale, with destinations, travel brands, and other organizations participating as exhibitors. Participating organizations will retain their own identity yet benefit from being part of a highly-visible, collaborative United States effort. To further amplify the USA's and participating partners' presence, Brand USA also organizes related events before, during, and after many of these shows.

Brand USA pavilions provide exhibitors:

- Market analytics and insights
- Marketing, advertising, and public relations and media exposure
- Increased global exposure and coherent branding
- Customer engagement and entertainment opportunities

USA PAVILIONS AT INTERNATIONAL TRADE SHOWS

Event	Dates	Location
TTG Incontri	October 10-12, 2018	Rimini
ITB Asia	October 17-19, 2018	Singapore
CITM	November 16-18, 2018	Shanghai
WTM	November 5-7, 2018	London
IBTM World	November 27-29, 2018	Barcelona
Vakantiebeurs *	January 9-13, 2019	Utrecht
Reiselivsmessen*	January 11-13, 2019	Oslo
Matka*	January 18-20, 2019	Helsinki
BIT Milan*	February 10-12, 2019	Milan
Showcase USA Italy*	March 2-5, 2019	Bergamo
Discover America Denmark*	March 4, 2019	Denmark
ITB	March 6-10, 2019	Berlin
WTM Latin America	April 2-4, 2019	São Paulo
ATM	April 28-May 1, 2019	Dubai
ITB China	May 15-17, 2019	Shanghai
IMEX	May 21-23, 2019	Frankfurt
IPW	June 1-5, 2019	Anaheim
JATA	September 2019	Tokyo
IFTM Top Resa	September 2019	Paris

* Brand USA participates in these shows in collaboration with Visit USA committees.

Brand USA Travel Week

During FY2019, we will introduce a whole new market engagement opportunity with Brand USA Travel Week, to be held September 9 to 13, 2019 in London. Brand USA Travel Week will be an integrated and immersive experience for both exhibitors and buyers, celebrating the United States—and will include three days of B2B sessions interspersed with an enrichment series focused on education and marketing insights, as well as a consumer marketing initiative.



Join us for the inaugural Brand USA Travel Week event, September 9-13, 2019 in London, England. Brand USA Travel Week is an immersive celebration of the United States showcasing the diverse range of travel experiences available in the USA. The event will consist of three major components:

- Brand USA Travel Expo
- B2B Sessions
- Enrichment Series
- Consumer Event

September 9-13, 2019
London, England

The B2B sessions will consist of 35 to 44 pre-prescheduled meetings with high-caliber buyers from the UK and Europe who will be attending by invitation. The featured enrichment series will include seminars and keynote speaker events throughout the week. Topics will range from innovative marketing strategies to subject matters focused on personal and professional growth, and the keynote speakers will bring new themes to the travel space. Finally, the consumer initiative is designed to generate consumer media interest to support our core message and call to action to visit the USA.

Sales Missions and B2B Sessions

During FY2019, Brand USA will host a combination of sales missions and B2B sessions in eight international markets.

Through these Brand USA-hosted events we will invite travel and tourism industry professionals in key markets to meet with U.S. organizations at designated international locations. Through a series of planned events, Brand USA and participating partners will connect directly with international travel buyers, including tour operators, airlines, travel agents, incentive and meeting planners, and media. These connections will allow us to provide a more in-depth look at U.S. destinations and experiences in order to increase the quantity and diversity of travel bookings to the United States.

Market(s)	Sales Mission or B2B Session	Dates
Taiwan	B2B	October 15, 2018
Mexico	Sales Mission	January 14-18, 2019
Australia and New Zealand	B2B	February 21, 2019
China	Sales Mission	March 17-22, 2019
Japan and South Korea	Sales Mission	July 7-12, 2019
India	Sales Mission	September 22-27, 2019

MegaFams and Other Familiarization Tours

Familiarization tours, or “fams,” with the travel trade will again be an integral part of Brand USA’s marketing strategies to create awareness of the diverse destinations and travel experiences available throughout the United States. The Brand USA fam tours are called “MegaFams” because they are the largest multi-itinerary, simultaneous familiarization tours conducted in the United States.

Brand USA will organize and coordinate these diverse U.S. travel experiences in order to more fully promote multiple destinations. They are especially effective in motivating the travel trade to sell destinations to, through, and beyond the gateways to their clients because the itineraries include a broad range of travel experiences, attractions, and brands from the popular gateway cities to off-the-beaten-path encounters. This mix of U.S. destinations and experiences is one of the many effective ways we are able to promote the entirety of the USA, including equal marketing of rural and urban destinations.

Through Brand USA MegaFam experiences, travel agents and tour operators become better informed, empowered, and inspired to sell a multitude of U.S. destinations. MegaFams being planned for FY2019 include:

MegaFam	Dates
China	October 24 - November 1, 2018
Brazil	March 13-21, 2019
United Kingdom & Ireland	May 9-17, 2019

Training Initiatives

Through Brand USA travel trade training initiatives we will provide the tools and information our international travel buyers need in order to sell, up-sell, and cross-sell U.S. travel destinations and experiences. These resources include:

USA Discovery Program



This online, experience-based, hands-on training platform features a variety of destination modules to inspire and motivate the travel trade to sell U.S. destinations of all shapes and sizes, as well as well-known and unexpected experiences, to their customers. Travel agents and tour operators earn specialist badges as they complete each section of these market-specific training platforms. This platform is currently available in Australia and New Zealand, Brazil, China, India, Mexico, and the United Kingdom and Ireland. We also offer a global site available for all English-speaking countries. During FY2019 we will expand the program to other markets, including South Korea and Germany, as well as launch a Chinese version on the WeChat platform.

Training Seminars

Brand USA will also present in-market training seminars to the travel trade that focus on a specific experience or region in the United States—providing a targeted approach to promoting U.S. travel destinations.

MEDIA AND PUBLIC RELATIONS (CONSUMER AND TRADE)



During FY2019 Brand USA will continue to increase its outreach to consumer and trade media to support its efforts to promote the entirety of the United States and will offer added value to partners through a number of programs that help increase awareness of the many unique experiences and range of destinations in the United States. Through the power and credibility of earned media coverage, Brand USA will inspire international travelers to visit the United States. Leveraging its access to and relationships with journalists, plus its online newsroom platform and ongoing scheduling of visiting journalist familiarization tours, Brand USA will promote destinations and travel experiences in every state, the District of Columbia, and the five territories with extensive media coverage in both travel trade and consumer media, including broadcast, print, and online. To help amplify and reinforce key marketing messages and initiatives, media pitches will support marketing efforts through messaging, timing, and markets.

FEDERAL PARTNER COLLABORATION



Brand USA will continue to work with its Federal partners and the Tourism Policy Council (TPC), led by the Department of Commerce, to deploy programs that support our mutual efforts to increase international visitation to the United States and communicate entry policy and travel updates to international travelers. In addition, we will continue to roll out our "Market the Welcome" international arrivals hall program at airports around the country. As the interagency, policy-coordinating committee composed of the leaders of nine federal agencies, the TPC will continue to be at the center of our Federal partner collaboration. Through this collaboration, Brand USA will conduct joint activities and leverage Federal assets to support international marketing efforts and policy communications. Specifically, and as provided for in the Travel Promotion Act, Brand USA will work with U.S. government partners to maximize the economic and diplomatic benefits of travel to the United States by:

Developing joint promotions and communications to international travelers;

- Providing useful information to travelers, the travel trade, media, and other stakeholders regarding entry requirements, required documentation, fees, processes, and information concerning declared public health emergencies; and
- Identifying, countering, and correcting misperceptions regarding United States entry policies.

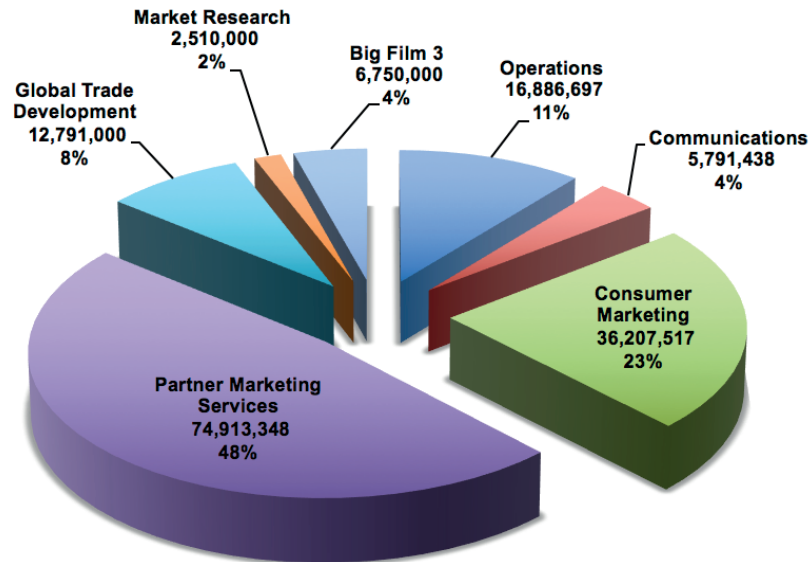


FY2019 Budget

BUDGET

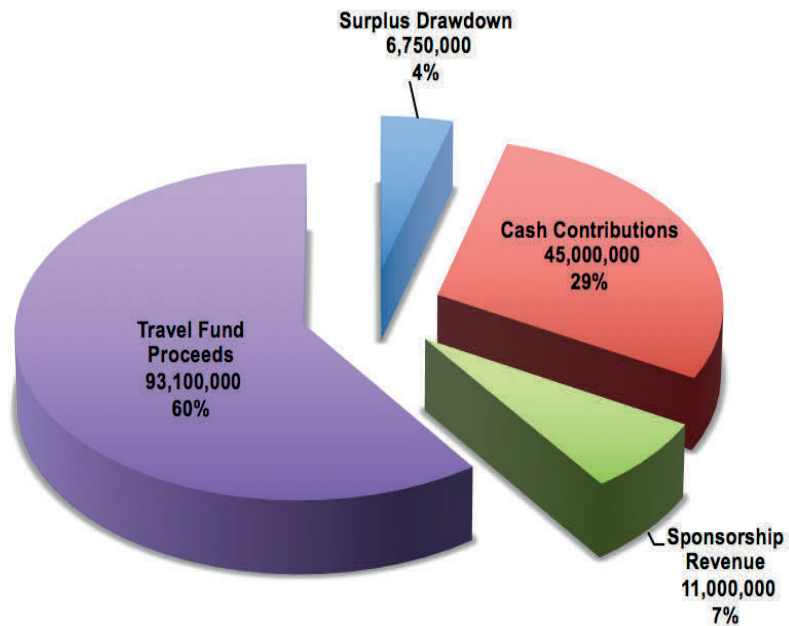
FY2019 EXPENSE BUDGET

\$155,850,000



FY2019 REVENUE BUDGET

\$155,850,000



EXPLANATION FOR BUDGET ITEMS OVER \$500,000

VENDOR	Budgeted Amount	Description
Alchemia	\$700,000	Representation and Trade Activation in Mexico
AVIAREPS (CNY) Marketing Garden Ltd.	\$1,250,000 - \$1,500,000	Representation and Trade Activation in China
AVIAREPS (JPY) Marketing Garden Ltd.	\$717,600	Representation and Trade Activation in Japan
AVIAREPS (KRW) Marketing Garden Ltd.	\$722,500	Representation and Trade Activation in Korea
Code and Theory (SF), LLC	\$750,000 - \$1,000,000	Digital Maintenance and Development
Farragut Center c/o Borger Management	\$1,266,700.86	Office Space for Brand USA HQ
Gate 7 Pty Ltd	\$958,000	Representation and Trade Activation in Australia
Google, Inc.	\$1,250,000	Search Engine Marketing
GoSeeTell Network / Sparkloft Media	\$750,000 - \$1,250,000	Social Media Management and Content Development
Hills Balfour Limited	\$2,000,000 - \$2,200,000	Representation and Trade Activation in UK and Western Europe
Hylink USA	\$750,000 - \$1,000,000	Chinese Digital and Social Media Development and Media Planning and Buying
Insomniac Design, Inc.	\$500,000 - \$800,000	Hosting, Maintenance, and Digital Development
MacGillivray Freeman Films, Inc.	\$6,750,000	Production and Distribution for IMAX-Caliber Documentary Film
Mediacom London	\$716,066.16	Media Planning and Buying Services
Mediacom Worldwide, Inc.	\$613,302	Consumer Media Campaign
Miles Partnership LLLP	\$5,500,000	Design, Printing, Distribution, and other Cooperative Marketing-Related Services
Miles Partnership LLLP	\$533,804	Cooperative Marketing Campaign
Novak Birch Synchronized Communications	\$761,796	Communications and Design Services
Ogilvy Public Relations	\$600,000 - \$1,000,000	Global Corporate and Consumer Public Relations
ORC International	\$750,000	Research and Ad Testing
Sartha Marketing Consultants	\$564,975	Representation and Trade Activation in India
SDL International, Inc.	\$750,000	Translation Services
TCCT Retail, Ltd.	\$2,650,000	Cooperative Marketing Campaign
TravMedia	\$600,000	Digital PR and Travel Trade Platform
U.S. Travel Association	\$1,450,000	Title Sponsorship of IPW

Note: The expenditures built in to Brand USA's budget in developing the broad categories reported to the Department of Commerce are budgeted as opposed to actual expenditures. Some budgeted expenditures may correspond to specific contracts or commitments that are in place at the time that the budget is prepared or specific expenditures for which Brand USA expects to issue a Request for Proposal (RFP). Other budgeted expenditures may be for predictable specific expenditures because they are types of specific expenditures that are repeated from one year to the next. In cases where there is no contract in place, we've included an estimate based on prior years or budgeted figures that correspond to the agreement, but may not be an exact figure. Where no vendor is listed, we have provided a budget range so as not to interfere in the competitive bid process by providing bidders too much information. When the Brand USA budget is prepared, Brand USA does not know where or how a substantial portion of its marketing budget will be spent. Where and how marketing dollars will be spent depends on variables such as what ideas will interest partners, market research, exchange rates, discounts, travel trends and other similar factors. Even if Brand USA reasonably anticipated that it would spend \$X million promoting travel from a particular international market to the United States, it often would not know during the budgeting process what specific expenditures it would make. The majority of Brand USA's budget comprises these types of expenditures.



The Brand USA Team

EXECUTIVE AND SENIOR LEADERSHIP



Christopher Thompson
President & CEO



Thomas Garzilli
Chief Marketing Officer



Anne Madison
Chief Strategy &
Communications Officer



Donald F. Richardson
Chief Financial Officer



Karyn Gruenberg
Senior Vice President,
Partner Marketing &
Strategic Alliances



Cathleen Domanico
Vice President,
Global Trade Development



Tracy Lanza
Vice President,
Integrated Marketing



Stanley Mattos
Vice President,
Financial Operations
& Facilities



Joann Pelipesky
Vice President,
Human Resources &
Administration



Carroll Rheem
Vice President,
Research & Analytics



Aaron Wodin-Schwartz
Vice President,
Public Policy & Public Affairs

BOARD OF DIRECTORS

Brand USA is governed by an 11-member board of directors appointed for a maximum of two consecutive three-year terms by the U.S. Secretary of Commerce in consultation with the Secretary of State and the Secretary of Homeland Security. As required by the Travel Promotion, Enhancement, and Modernization Act of 2014, all members of the board are United States citizens and are either current or former chief executive officers, chief financial officers, or chief marketing officers, or have held equivalent management positions. Members of the board have leadership expertise in specific sectors of the travel industry including: hotel accommodations; restaurants; small business or retail sector or a related association; travel distribution; attractions or recreations; state-level tourism office; city-level convention and visitors bureau; passenger air; land or sea transportation; and immigration law and policy. At least two members of the board are audit committee financial experts. In addition, at least five members of the board have expertise in international travel promotion or marketing broadly representing various regions of the United States. The following business leaders at the time of publication of this plan serve on the board of directors of Brand USA:



Barbara J. Richardson
Chair, Brand USA

Chief of External Relations, Washington Metropolitan Area Transit Authority
Board member since October 2013
Member: Finance Committee
Represents: Land or sea transportation sector



John F. Edman
Vice Chair, Brand USA

Director & CEO, Explore Minnesota Tourism
Board member since October 2014
Member: Finance Committee and Marketing Committee
Represents: Official of a state tourism office



Kyle Edmiston
Vice Chair, Brand USA

Deputy Director/Chief Operations Officer, Lake Charles/Southwest Louisiana Convention & Visitors Bureau
Board member since December 2015
Chair: Audit Committee
Member: Marketing Committee
Represents: Official of a state tourism office



Andrew Greenfield
Secretary, Brand USA

Partner, Fragomen, Del Rey, Bernsen and Loewy, LLP
Board member since October 2013
Chair: Governance & Nominating Committee and Conflict of Interest Committee
Represents: Immigration law and policy sector



Arne M. Sorenson
Treasurer, Brand USA

President & CEO, Marriott International, Inc.
Board member since October 2012
Chair: Finance Committee
Represents: Hotel accommodations sector



Maryann Ferenc

Board Member

Founder, President & CEO,
Mise en Place, Inc.

Board member since December 2015

**Member: Marketing Committee
and Conflict of Interest Committee**

Represents: Restaurant sector



Mike Gallagher

Board Member

Co-chairman & co-founder, CityPASS
Board member since November 2017

**Member: Finance Committee and
Governance & Nominating Committee**

Represents: Small business or retail sector



Noel Irwin Hentschel

Board Member

Chairman and CEO,
AmericanTours International, LLC.

Board member since November 2017

**Member: Audit Committee and
Marketing Committee**

Represents: Travel distribution services sector



Alice Norsworthy

Board Member

Chief Marketing Officer,
Universal Parks & Resorts

Board member since December 2016

Chair: Marketing Committee

Member: Finance Committee

**Represents: Attractions or
recreations sector**



Thomas F. O'Toole

Board Member

Senior Fellow and Clinical Professor
of Marketing, Kellogg School of
Management, Northwestern University

Board member since December 2016

Chair: Conflict of Interest Committee

Member: Marketing Committee

Represents: Passenger Air Sector



Rossi Ralenkotter

Board Member

President & CEO, Las Vegas Convention
and Visitors Authority

Board member since December 2015

Member: Marketing Committee




**Represents: Official of a City Convention
& Visitors Bureau**








Connect With Us

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

For industry or partner information about Brand USA, please visit or connect with us on the following Brand USA corporate channels:

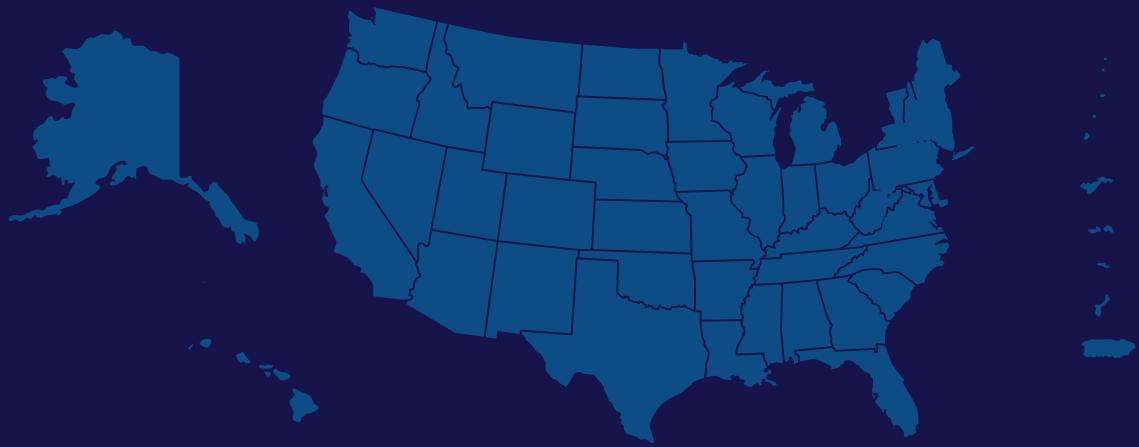
-  TheBrandUSA.com
-  [@BrandUSA](https://twitter.com/BrandUSA)
-  YouTube.com/BrandUSATV
-  Linkedin.com/Company/BrandUSA

For information about exceptional and unexpected travel experiences in the United States, please visit or connect with us on our consumer channels:

-  VisitTheUSA.com
-  [@VisitTheUSA](https://twitter.com/VisitTheUSA)
-  Facebook.com/VisitTheUSA
-  YouTube.com/VisitTheUSA
-  [@VisitTheUSA](https://www.instagram.com/VisitTheUSA)
-  Google.com/VisitTheUSA

GoUSA_{tv} Available on Roku, Apple TV, Amazon Fire, and associated apps

To receive our news and updates, please visit TheBrandUSA.com and enter your email address at the bottom of the home page.



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