

VisitTheUSA.com

Brand USA

A photograph of two young women in winter clothing (teal jacket and grey beanie, denim jacket and black hoodie) cheering with their arms raised. They are in a field with many colorful hot air balloons in the background.

# QUARTERLY REPORT

November 2020 | FY2021 Q1

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# LETTER FROM THE PRESIDENT AND CEO

CHRISTOPHER L. THOMPSON



**The USA  
remains an  
aspirational  
destination,  
which reflects  
the spirit of  
freedom and  
reinvention  
that has always  
characterized  
the nation.**

The unprecedented conditions caused by the COVID-19 pandemic are now eight months old. This difficult period has underscored the importance of a national destination marketing entity to maintain infrastructure, messaging, and research while so much of the industry has been forced to scale back their presence in critical markets. This document will provide an overview of the ways Brand USA has worked to meet this moment during the final two months of Fiscal Year 2020 (FY2020) and the first two months of Fiscal Year 2021 (FY2021). It will show where we are now, where we are going, and how we get there.

We opened FY2021 on October 1, 2020, in a state of readiness, which allows us to efficiently use limited resources while continuing to influence key aspects of the travel ecosystem. During this state of readiness one of our main priorities is to ensure we serve the diverse needs of our partners and the U.S. travel industry.

Last month, we launched [Brand USA Global Marketplace](#), an always-on, virtual platform that enables U.S. destinations, travel brands and federal agencies to connect with travel trade, both receptive and buyers around the globe. The platform's inaugural event was the second edition of [Brand USA Travel Week Europe](#). A series of additional events focused on key markets are in development and will take place in the winter and spring of 2021.

Throughout the state of readiness, we are continually monitoring a series of gating criteria to determine when conditions are appropriate to transition to recovery mode. These criteria include source market conditions, such as air service, entry restrictions and consumer sentiment and behavior, as well as home market conditions, like virus spread, openness of destinations and attractions, and fiscal conditions, such as new partner contributions toward international marketing.

Once conditions warrant, we will launch a recovery campaign using the best of Brand USA's content — including world-class cinematography and storytelling — and leveraging partnerships with airlines, tour operators and OTAs to drive bookings to the USA. This campaign will provide opportunities for partner participation and support the needs of communities across the country as they recapture the economic contribution of international travel.

The USA remains an aspirational destination, which reflects the spirit of freedom and reinvention that has always characterized the nation. Our FY2021 framework will position the United States to recapture its share of global visitation and spend when people begin to travel internationally again.

Together, we're building the future of U.S. tourism.

Christopher L. Thompson  
President & CEO

# SITUATIONAL ANALYSIS



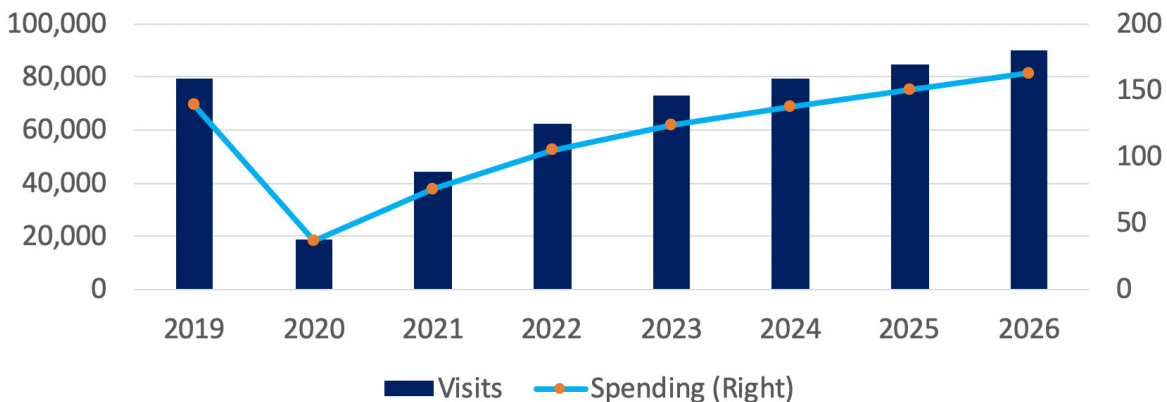
Grand Teton, Wyoming

With the widespread expectation that winter weather will exacerbate the transmission of COVID-19, the next quarter is expected to be particularly challenging. Though an effective combination of individual mitigation efforts, testing, treatment, and vaccines will eventually make a dramatic impact in the world's battle with COVID-19, most in the scientific community agree that things will get worse before they get better.

## INBOUND VISITATION AND SPENDING

According to Oxford Economics, the recovery of inbound visitation will take four years to reach 2019 levels. 2021 arrivals are projected to more than double from 2020, growing 138% to 44.4 million visitors. Despite this growth, 2021 arrivals are expected to reach just 56% of 2019 volume. 2021 spending is expected to grow 108% from 2020 to \$75.6 billion, which is 54% of 2019 spending.

U.S. International Visits and Spending  
(Million Visits, \$ Billions)



Source: Oxford Economics

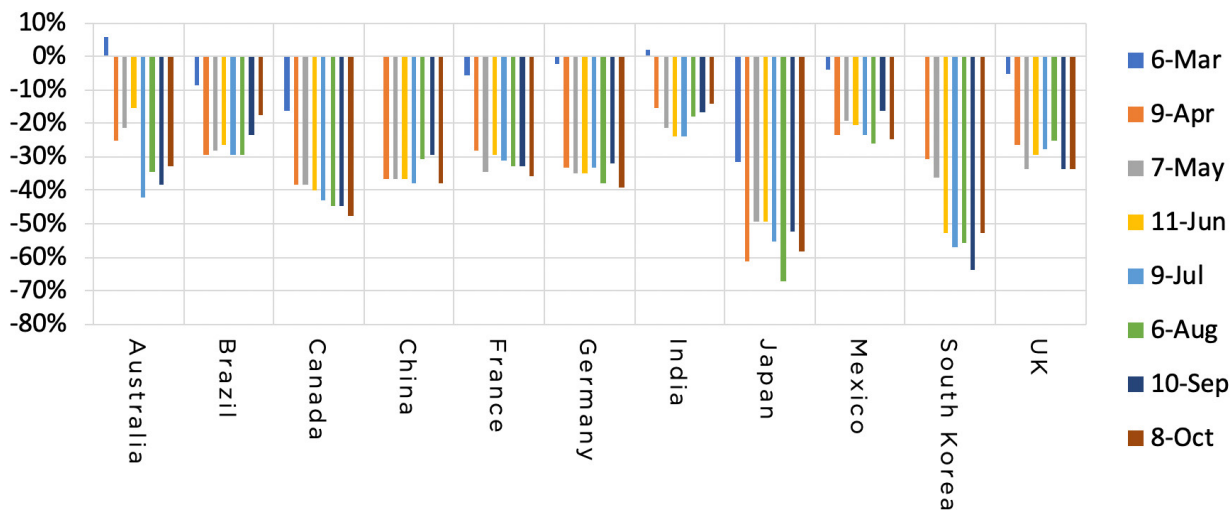


## CONSUMER SENTIMENT

Travelers around the world are understandably concerned about taking international trips while COVID-19 remains at pandemic levels. While the virus drives most of the immediate concerns about travel, economic hardship adds an additional level of pressure on consumer spending.

Brand USA has been tracking consumer sentiment regarding international travel in our key 11 target markets for years, allowing us to measure the impact that COVID-19 has had on intent to travel relative to previous standards. The chart below displays significant drops in likelihood to travel in the next 12 months compared to 2019 levels in many key target markets. Until the pandemic subsides, we expect the current trend to remain consistent.

Likelihood to Travel Internationally in the Next 12 Months  
(% Change over 2019 average)



Base: All respondents, N=1,000 per market  
Source: Engine/ORC Custom Study

# STATE OF READINESS



Brand USA closed FY2020 and opened FY2021 in a “state of readiness.” Readiness allows for the preservation and efficient use of resources while continuing to influence key aspects of the travel ecosystem. When gating criteria related to international markets and domestic destinations indicate conditions are suitable, Brand USA will transition to recovery mode.

The Brand USA team is developing a robust recovery campaign, so when the time is right, the industry and our partners can quickly re-enter key markets to grow international visitation and spending.

While in a state of readiness, Brand USA continues to pursue important work to position the United States for a quick recovery and keep the country top of mind among consumers and travel trade. October saw the launch of Brand USA Global Marketplace, an innovative platform to connect the U.S. travel industry with global travel distribution networks, as well as the second edition of Brand USA Travel Week Europe on the virtual platform. In addition, Brand USA continues to strategically engage with and equip travel trade and media in key international markets to help keep the world inspired to visit the USA. Finally, Brand USA continues to deliver inspirational content to consumers through organic channels like GoUSA TV and partnerships with organizations like Airbnb. As part of these efforts,

Brand USA has placed particular emphasis on its “many voices” approach to feature diverse and multicultural experiences.

Throughout the state of readiness, Brand USA will monitor a series of gating criteria to determine when conditions are appropriate to launch a recovery campaign. These criteria include source market conditions, such as air service, entry restrictions and consumer sentiment and behavior, as well as home market conditions, like viral spread, openness of destinations and attractions, and partner demand for international marketing.

Once there is sustained progress against these criteria, Brand USA will transition to a recovery phase and launch a recovery campaign in priority source markets. This campaign will provide opportunities for partner participation, while supporting the needs of communities across the U.S. as they recapture the important economic contributions of international travelers.

# Brand USA Global Marketplace



## Brand USA Global Marketplace Lobby

Brand USA Global Marketplace launched October 2020. It is a custom-built, always-on, virtual platform that provides access to a diverse range of U.S. destinations, attractions, and points of interest for the international travel industry.

This unique interactive platform connects Brand USA's domestic partners with international audiences, allowing them the opportunity to:

- Interact with and virtually explore U.S. destinations
- Connect directly with U.S. destinations
- Schedule B2B meetings
- Participate in educational sessions about the USA and its diverse destinations, products and services
- Participate in enrichment sessions that provide insight from thought leaders in the industry
- Access itineraries and marketing collateral



Brand USA Global Marketplace Video On-Demand room

## Brand USA Global Marketplace Features

### USA Partner Pavilions

Within the USA Partner Pavilions, there are currently 140 exhibitor pods populated by U.S. destinations, brands, receptive tour operators, federal partners, and others. This number will continue to grow. Buyer and supplier participants alike will continue to establish additional meetings during and between activation events such as Brand USA Travel Week Europe.

### Video On-Demand room

The Video On-Demand room houses carefully curated and continuously updated content. Available 24/7, the research and market updates will be updated quarterly and will serve as a resource in the coming months. Other content, such as the Brand USA Travel Week Europe 2020 enrichment series and inspirational GoUSA TV videos showcase the variety and diversity of U.S. travel opportunities, is maintained in the Video On-Demand room.

### Buyer Pavilion

The Buyer Pavilion features a buyer directory, which allows exhibitors to connect directly via email with specific buyers from a variety of markets.

### Mainstage and Networking Lounge

These two features of Brand USA Global Marketplace are active only during live events. Participants can view live and prerecorded programming on the Main Stage and in the Networking Lounge, participants can make live connections with industry colleagues via hosted video calls.

# Brand USA Travel Week Europe 2020



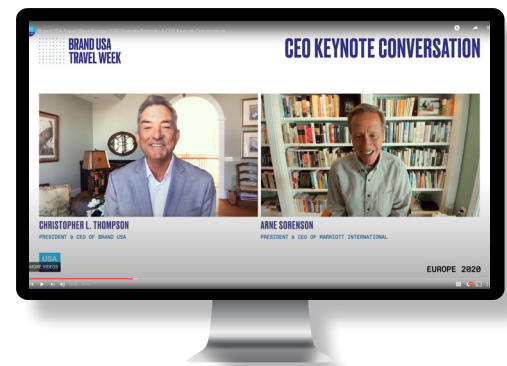
Brand USA Travel Week Europe 2020 Main Stage

Brand USA Travel Week Europe 2020 was the first event hosted on the Brand USA Global Marketplace platform, October 26-29. This event brought together the biggest players in the European travel industry to drive growth in the U.S. travel sector.

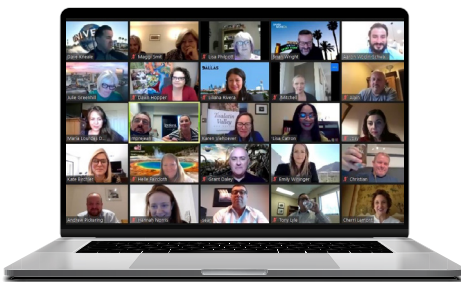
The four-day event incorporated match-made appointments, offering genuine connectivity and a crucial opportunity to discuss the trends, challenges, innovations, and opportunities to grow visitation to the United States from Europe.

The Enrichment Series – a rich program of innovative speaker sessions – offered critical market insights from compelling speakers including marketers, strategists, and industry leaders.

Partners showcased the diverse destinations, products, and services of the USA at their own customizable pods, which also offer downloadable digital resources with the latest marketing collateral, including video, images, and itineraries.



Brand USA Travel Week Europe 2020 CEO Keynote Conversation, featuring Arne Sorenson, Marriott International, and Chris Thompson, Brand USA



Brand USA Global Marketplace, UK and Ireland Networking Session

**150+**  
buyers

**2.6K+**  
appointments

**18**  
markets

**17**  
enrichment series

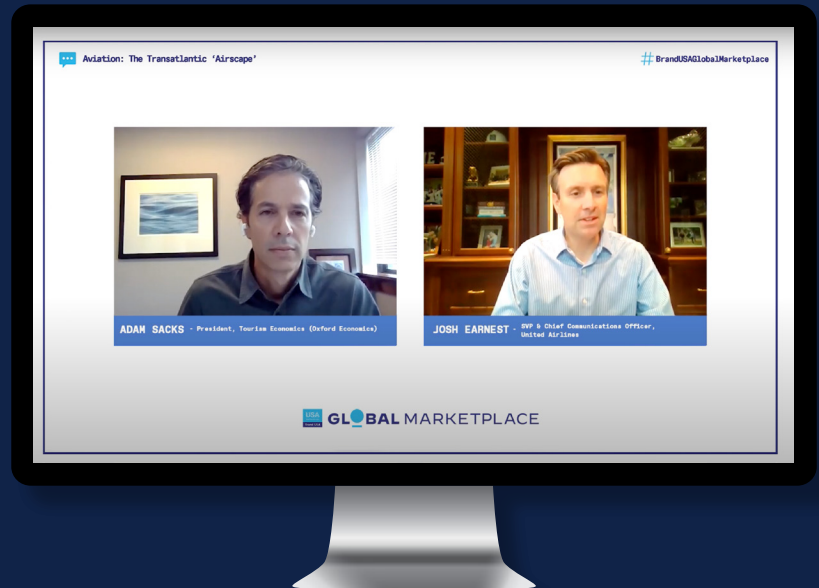
**113**  
exhibitors

**24**  
networking sessions



**BRAND USA TRAVEL WEEK EUROPE 2020  
ENRICHMENT SERIES**

Throughout Brand USA Travel Week Europe, a daily Enrichment Series provided valuable insights from tourism leaders and inspiring speakers such as CEOs, category specialists, and media figures. The popular series inspired fresh thinking and stimulated thought-provoking conversation about timely themes and the latest research.



Aviation: The Transatlantic 'Airscape' with Adam Sacks, Tourism Economics (Oxford Economics), and Josh Earnest, United Airlines.

**MONDAY, OCTOBER 26, 2020**

KEYNOTE SESSION

# CEO KEYNOTE CONVERSATION



**ARNE SORENSON**  
PRESIDENT & CEO OF MARRIOTT INTERNATIONAL

**TUESDAY, OCTOBER 27, 2020**

ENRICHMENT SESSION

# AVIATION: THE TRANSATLANTIC 'AIRSCAPE'



**JOSH EARNEST**  
**ADAM SACKS**

**WEDNESDAY, OCTOBER 28, 2020**

ENRICHMENT SESSION

# EUROPEAN TRAVEL TRENDS



**DAMON EMBLING**  
**JENNY SOUTHAN**  
**DONALD LEADBETTER**  
**ANDREW GIBSON**

**THURSDAY, OCTOBER 29, 2020**

ENRICHMENT SESSION

# SUPPORTING BLACK-OWNED TRAVEL BUSINESSES



**STEPHANIE JONES**  
**AL HUTCHINSON**  
**CHERAÉ ROBINSON**



# GLOBAL MARKETPLACE

TOGETHER, WE'RE BUILDING THE  
FUTURE OF U.S. TOURISM.

## UPCOMING EVENTS HOSTED ON BRAND USA GLOBAL MARKETPLACE\*

### Focus on Canada

Focus on Canada will provide the latest insights on the Canada travel landscape for our U.S. partners, while providing the Canadian travel trade the latest products, protocols, and 'what's new' in the U.S. travel and hospitality industry.

### Brand USA Receptive Operator Marketplace

Brand USA Receptive Operator Marketplace will provide a platform to connect U.S. partners with leading RTO's to ensure diversity and depth of U.S. product and programs in the pursuit of rebuilding international visitation to the United States

### Focus on Mexico

Focus on Mexico will provide the latest insights on the Mexican travel industry for our U.S. partners, while also providing the Mexican travel trade the latest information on U.S. destinations and protocols, and 'what's new' in the U.S. travel and hospitality industry.

### Brand USA Media Mondays and Trade Tuesdays

To encourage continuous engagement on Brand USA Global Marketplace, Brand USA Media Mondays and Trade Tuesdays will target existing registered users by spotlighting both key media and trade partners and inviting them to speak and inform the industry of the latest trends and updates in the travel world.

### Brand USA European Media Forum

Focusing on powerful destination storytelling, newsworthy panel discussions, and targeted one-on-one meetings between influential European media and U.S. partners, this initiative will provide a unique platform to address, shape, and elevate the position of the U.S. in Europe.

### Focus on Germany & Northern Europe

Focus on Germany & Northern Europe will provide the latest updates and sales reporting from Germany and the Nordic region as we look to the spring booking and travel period.

### Focus on Australia & New Zealand

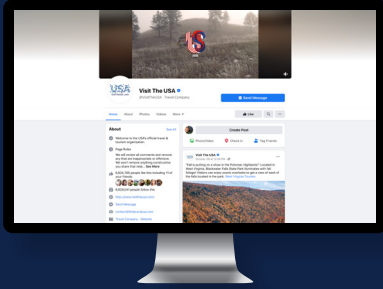
Focus on Australia & New Zealand provide key and relevant updates and insights on the travel landscape of Australia and New Zealand as we anticipate a return to summer and fall travel 2021.

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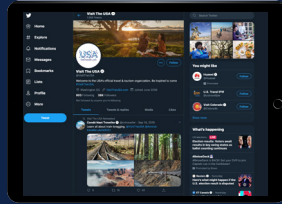
\*Subject to final confirmation

# Organic Opportunities

## ORGANIC SOCIAL



f @VisitTheUSA



@VisitTheUSA



@VisitTheUSA

In an effort to maintain communications with our social audience around the world, Brand USA continues to maintain its consumer social media presence, deploying strategies and tactics aimed at fostering community and communication with potential travelers, highlighting the best of what the USA has on offer.

In the fourth quarter of FY2020, Brand USA social media presence was exclusively organic and delivered the following results:

# 8.37M

impressions

# 435.1K

engagements and video views

# 1.23K

total posts made, including all local market translations

In addition to performance metrics, sentiment monitoring of Visit The USA channels revealed:

# 95%

positive and neutral conversions

# 5%

negative conversions (3% decrease from Q3)

## INSTAGRAM REELS

During FY2020 Q4 Brand USA launched its presence on [Instagram Reels](#) in an effort to ride the momentum on Instagram's latest creative feature. Instagram Reels is Instagram's competitor to popular video sharing app TikTok and allows users to create unique 15-second videos and distribute them across the Instagram platform.

# 151.8K

video views

# 100%

positive or neutral sentiment





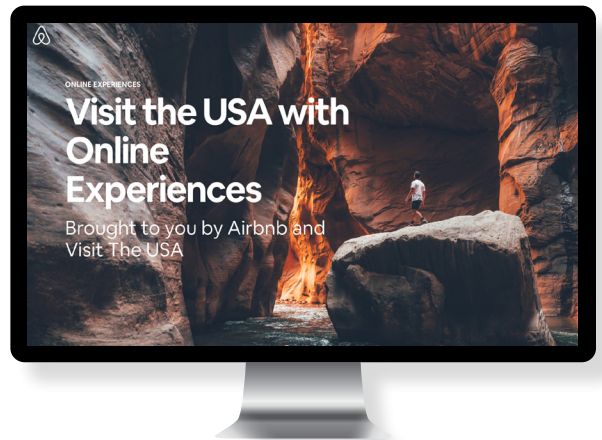
Brand USA Southern Tour featuring Chef Nick Wallace

### AIRBNB ONLINE EXPERIENCES PARTNERSHIP

With international travelers hunkered down at home and unable to travel to the USA, Brand USA formed a strategic partnership with Airbnb around its **Online Experiences** offerings. This partnership sought to connect international audiences with U.S. locals in a virtual environment, giving them a taste of a trip to the USA.

Featuring locals who have previously been highlighted in Brand USA's United Stories campaign, the diverse range of experiences showcase everything from southern cooking in Mississippi to whiskey tasting in Nashville and LGBTQ walking tours in New York City.

The partnership with Airbnb allows small businesses impacted by COVID-19 to generate alternative revenues through the platform by hosting online experiences for groups and individuals.



Since launching, Brand USA has promoted the Online Experiences offerings organically, primarily by leveraging international influencers, and has realized the following results:

**251.9K**  
video views

**2.2M**  
impressions



Nelson's Greenbrier Distillery owners, Nashville, Tennessee

Additionally, Airbnb has committed a number of organic tactics such as email distribution to audiences in the UK, Canada and USA.

# NATIVE VOICES



GoUSA TV *Native Voices* Playlist Key Art

## GOUSA TV AND MULTICULTURAL PLAYLISTS

GoUSA TV viewers the world over with its range of original and curated episodic content, documentaries, and films about U.S. destinations and experiences told from the diverse perspectives of real people across America. Over the past three months, Brand USA has rolled out curated playlists that leverage the many voices platform to tell the diverse stories of travel experiences in the United States.

### Black Voices

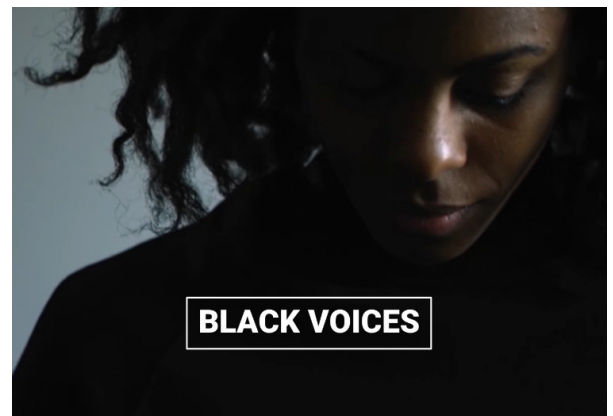
The *Black Voices* playlist is a collection of short-form entertainment that features destinations through the perspective of talented local Black filmmakers, artists, musicians, photographers, storytellers and more from cultural icons like Spike Lee to emerging creatives really shaping the space. Curated by producer and creator Brian Newton, the playlist showcases a wide array of Black artists and celebrate the meaningful contributions of the Black community from food to music, arts, and culture all across the United States.

### LatinX Voices

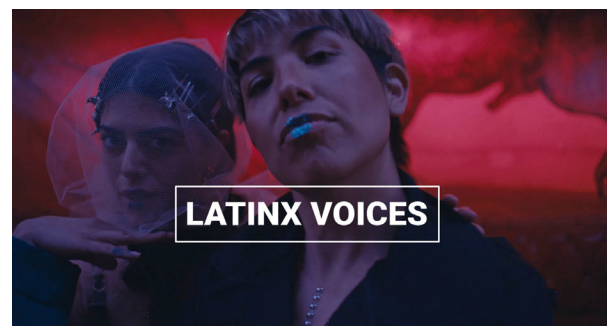
The *LatinX Voices* playlist celebrates the diverse LatinX cultures in the United States. Curated by Costa Rican-American filmmaker Mariana Blanco, the playlist showcases the vibrant contributions made by LatinX communities to the cities and states where they reside.

### Native Voices

The *Native Voices* playlist celebrates the rich history, cultures, and traditions of indigenous people across the United States. Curated by Sherry L. Rupert, the Chief Executive Officer of the American Indian Alaska Native Tourism Association, the features an array of content about American Indians, Alaska Natives, and Native Hawaiians.



GoUSA TV's *Black Voices* Playlist Key Art



GoUSA TV's *LatinX Voices* Playlist Key Art

# Global Trade Development Travel Trade Activity

As COVID-19 and associated travel restrictions continue to bog down many of Brand USA's target markets, Brand USA has remained focused on keeping the USA top of mind with key travel trade and media through the summer and fall. The intent is to maintain engagement and keep these critical distribution channels inspired and knowledgeable about the USA.



## Brand USA's Korea reps dress as park rangers for National Parks webinar

### USA Discovery Program: Brand USA's online travel agent training platform

This program encourages and incentivizes the retail agent community to learn more about the diverse aspects of the USA from their home bases.

### Webinars: online trainings, often with either tour operator or U.S. destination partners

Informative and inspiring webinars that engage the trade in a fun and creative way to encourage deeper knowledge of the USA. This summer also featured Brand USA Movie Nights in which teams present and showcase travel products created around Brand USA's giant screen films and GoUSA TV content while screening Brand USA's world-class video content.

### Newsletters: via Brand USA built databases to a loyal and interested audience

Provide updates on consumer activities, trade incentives, training opportunities, partner information on a regular basis.

### Product development training

Many tour operators are looking for travel product that match new consumer preferences, especially self-drive itineraries that allow travelers and groups to avoid crowded modes of visiting. Brand USA has a perfect solution to fulfill this need. For example, Brand USA "Insider Guides" feature these itineraries as bookable product through receptive tour operators. Trainings in all markets ensure international teams are knowledgeable and aware of all new products available.

### Consumer content training

Throughout the summer, the international teams have also prioritized the way that they are showcasing Brand USA's consumer content assets that are available to the travel trade. In addition to working directly with the product developers in market, the teams have developed content presentations that enable the brochure production and marketing teams at key tour operators how to use and access Brand USA's quality DAM for use of high res images, video footage, social media imagery, online banners etc. ensuring that the quality and look and feel of the USA promotions.



"One Badge Wonder" trade incentive campaign

July 10 - October 28

# 18.5K

Agents trained in all markets

# 34.8K

USA Discovery Program badge completions

# 265.8K

Trade newsletter distribution

# Earned Media: Consumer & Trade Public Relations

During FY2020 Q4, Brand USA earned media activities continued to promote inspirational travel stories while travelers and media remained safely at home. Key initiatives included the National Park Service's 104th anniversary on August 25, the launch of the USA collection of Airbnb Online Experiences (OEs) on September 29, GoUSA TV, and more. Brand USA also hosted four end-of-year virtual media events to engage with media and share content ideas to keep the U.S. top of mind.

Our coverage results were impacted by a change in consumer behavior—pandemic fatigue set in, stay-at-home orders were lifted, and travelers set off on summer vacation—as well as a shifting media landscape with fewer outlets in existence and limited opportunities for long-haul travel coverage while the borders are closed. Despite this, media sentiment remains positive and the United States remains a top travel destination for when international travel resumes.

## Q4 by the Numbers

**379** placements  
**437.4K** impressions  
**4.82** destinations featured per placement

### National Parks/Great Outdoors

**97** placements  
**50.9M** impressions

### Airbnb

**10** placements  
**45.5M** impressions

### GoUSA TV

**28** placements  
**3.6M** impressions

## FY20 by the Numbers

**2.5K** placements  
**5.1B** impressions  
**378** unique destinations featured

### Outlet audience composition

**54%** consumer articles  
**46%** trade articles



**Spain: "La Última Experiencia" Watch Party with ESPN Host Pilar Perez on September 24**

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**Italy: Meet & Greet with the National Park Service on September 29 (295.2K social media impressions)**

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**Mexico: Exploration in the United States with Astronaut John Herrington on September 29**

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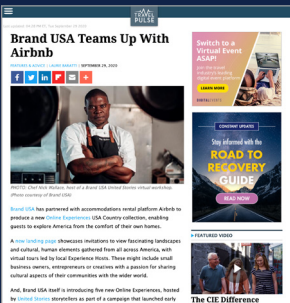


**India: GoUSA TV Presentation on September 9**

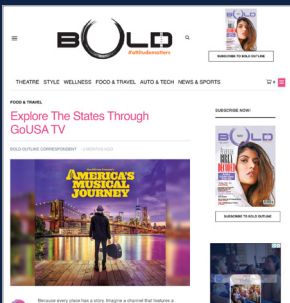
Brand USA continued to pitch inspirational travel stories related to our hero initiatives, global content themes, and holidays like World Photography Day, International Strange Music Day, Bourbon Heritage Month, and more.



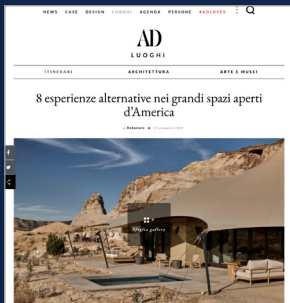
Vogue.com (Taiwan)



TravelPulse.com (U.S.)



BoldOutline.in (India)



Architectural Digest/AD-Italia.it (Italy)

## Partner Marketing

Brand USA's operating model is built upon the relationship with industry partners. These partners provide critical resources to fund Brand USA operations and are indispensable to enabling the organization to effectively market destinations and experiences in all corners of the country.

While so many industry partners have been negatively affected by COVID-19 and the pause in international travel, Brand USA's role in helping these organizations understand and navigate the changing global travel environment is more important than ever. From sharing the most recent insights to soliciting social media video content to launching Brand USA Global Marketplace with more than 140 exhibitors, Brand USA has maintained close communication and continued to provide value to partners. Moving forward, it will be critical to continue to share Brand USA's read of the international marketplace with partners, to garner their unique needs and insights, and to support them in planning for recovery.

During FY2020 Q4 and FY2021 Q1, Brand USA has also sought to gauge partners' outlook, resource deployment, and recovery planning. These partner insights allow Brand USA to best support partner needs, provide actionable insights, and incorporate partner planning with recovery campaign development.

### PARTNER TRAVEL TRADE FOOTPRINT SURVEY

Brand USA conducted calls with 85 partners to complete a travel trade footprint survey. This survey measured the levels of headquarter staff and international representation prior to COVID-19, during COVID-19, and in planning for 2021. The purpose of this is to identify gaps in partner staffing and representation to best support them in global travel trade development. Brand USA has the capacity to support these partners through its own representation network as well as innovative B2B platforms like Brand USA Global Marketplace.

### RE-ENTRY PLANNING

Brand USA hosted two partner focus groups about reentry in Canada (16 partners) and Mexico (18 partners). In both cases, some partners are eager to reenter the market in spring 2021, pending suitable entry policy. They expressed interest in continued support from Brand USA through consumer sentiment insights. In Canada, partners expressed an interest in Brand USA maintaining awareness as well as partner programs with a bookable call-to-action. In Mexico, partners would like support from Brand USA in messaging entry policies and procedures during and after the pandemic. In both markets, there was a clear desire for partner programs featuring airline co-ops and bookable calls-to-action.

These and more partner insights are key features of Brand USA's FY2021 business framework. They allow tracking against partner/fiscal conditions as part of the gating criteria and they also inform planning for an integrated recovery campaign to position the United States and individual destinations to quickly reenter key source markets for travel.

2019

92%

of the partners had some sort of international representation.

2020

65%

of the partners had international representation, a 29% decline compared to 2019.

*29% of the partners with international representation\* eliminated all international representation. Greater declines of representation were seen in Korea, China, India, Japan, and Mexico.*

2021


85%

of the partners are planning to have some sort of international representation\* in some markets, but not as the same level as before.



# GATING CRITERIA



 Sedona, Arizona

One of the big questions confronting the travel industry since the beginning of the COVID-19 pandemic has been the timing to resume international marketing and begin a recovery campaign.


Brand USA has developed a set of “gating criteria” to help determine when the conditions are appropriate to transition from state of readiness to recovery mode. Brand USA’s criteria span three categories: conditions in key source markets, conditions in the United States, and corporate/partner fiscal conditions.

Brand USA is monitoring these gating criteria on a rolling basis to determine when sufficient criteria across all three categories show sustained momentum sufficient to justify a transition from state of readiness to deploying resources against a recovery marketing campaign. The organization also continues to assess the suitability of each indicator and the target for progress in each that would provide the confidence to transition to recovery mode. The working targets featured in the table below represent the organization’s latest thinking, which will also be assessed on a rolling basis. Review and feedback by the board of directors is welcomed.



 Washington, DC



 Denver, Colorado

### Gating Criteria

Category	Criteria	Indicator	Target	Metric
Source market conditions	New daily COVID case growth	Month-over-month trends AVG cases per day	3 months of "strong" month over month trend OR less than 500 average cases per day	Weak > +15%; Neutral > -15%, < -15%; Strong < -15%
	Air service	Planned increases in seat capacity from source market	3 months of "strong" month over month trend	Weak < +0%; Neutral > +0%, < +15%; Strong > +15%
	Consumer sentiment	Increase in intent to visit the USA	3 months of "strong" month over month trend	Weak < +0%; Neutral > +0%, < +10%; Strong > +10%
	U.S. and home country entry/quarantine policies	Entry to the USA permitted No onerous requirements in USA or home country	Entry permitted from source market; Minimal quarantine requirement	Entry restrictions removed U.S. and home country quarantine requirements removed or minimized
	Consumer behavioral indicators	Search and product queries for travel to the USA	3 months of "strong" month-over-month trend	Weak < +0%; Neutral > +0%, < +15%; Strong > +15%

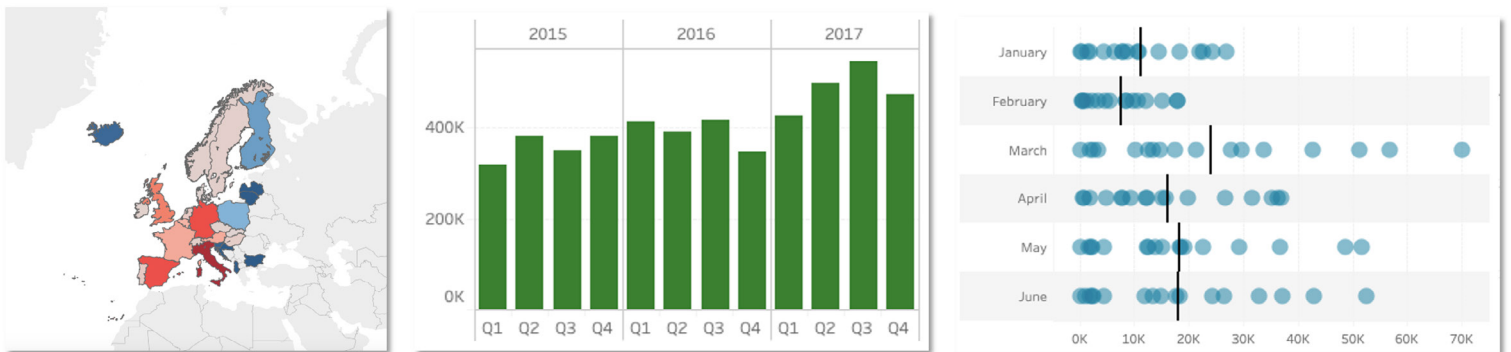
Category	Criteria	Indicator	Target	Metric
Home market conditions	New daily COVID case growth	Sustained decline/maintained low volume of cases	<i>Under discussion (e.g., AVG case rate below x level + declines in new case rates)</i>	<i>Under discussion</i>
	Destinations are open and eager to accept visitors	Gateway destinations allow recreational attractions, retail stores and restaurants to operate at sufficient capacity	<i>Under discussion (e.g., x number of partners say they are ready to receive int'l visitors. Removal of state-to-state quarantine requirements.)</i>	<i>Under discussion</i>



San Francisco, California

In order to provide actionable insights to partners and proceed transparently with the travel industry, Brand USA will begin to publish a dashboard showing market-by-market progress against the source market gating criteria. Below is a rendering (for placement only) of what the dashboard will look like.

### Gating Criteria Dashboard



Charts are directional design only

# RECOVERY PREPARATION



Houston, Texas

Brand USA is committed to the creation of a wholly integrated campaign to drive both consumer inspiration and partner value that will launch when gating criteria is met.


The messaging tasks will focus on communicating safety, building confidence and welcoming international travelers, all with the objective of driving bookings to the USA.

The following considerations are designed to ensure the recovery strategy delivers on these needs.

## RECOVERY COMMUNICATIONS OBJECTIVES

- ✓ **Prove that the USA is ready - safety**
- ✓ **Welcome the world back**
- ✓ **Entice and convert - drive bookings**
- ✓ **Bring to life post-COVID opportunities**
- ✓ **Open the Toolbox**



 Columbus, Ohio

## RECOVERY COMMUNICATIONS OBJECTIVES



### OBJECTIVE 1: PROVE THAT THE USA IS READY – SAFETY

Safety will be a non-negotiable aspect of the travel landscape when international travel returns to the USA. Brand USA will highlight the efforts across the travel spectrum (airports, DMOs, hotels, etc.) to ensure safety is clearly communicated to those planning international travel. Brand USA will need to reassure prospective travelers that the USA is ready to host them – safely.

**Tactic 1:** Global influencer program “On the Road Again” ahead of broader, more robust marketing strategies to communicate safety in visiting the USA.

**Tactic 2:** Branded content partnerships with trusted media outlets, tour operators, airlines, and OTAs to communicate safety through a combination of communications tactics.

**Tactic 3:** Always-on social strategy, which builds on the safety messaging and allows for two-way communication of the country’s efforts with Brand USA’s global audience of more than 7M fans and followers.



### OBJECTIVE 2: WELCOME THE WORLD BACK

Travelers are eager to get back to vacationing. At the same time, there will be fierce competition for the frequent international traveler who has 12 months of pent-up travel demand. Brand USA will produce a high-impact digital TV Spot that welcomes the world back to the USA and reminds them why the country should remain at the top of their bucket list.

**Tactic 1:** Inspirational creative spot that can serve as a first-touch asset in the conversion funnel as part of a broader integrated campaign.

**Tactic 2:** Inspirational road trip featuring accomplished content creators leveraging the United Stories Airstream and showcasing the diverse possibilities to be experienced in the USA.

**Tactic 3:** Partner social media cutdowns to ensure that partner creative ladders back to the broader recovery campaign.



### OBJECTIVE 3: ENTICE AND CONVERT - DRIVE BOOKINGS

Once travel resumes, a number of travel destinations will be fighting for the attention of the same target audience. Brand USA will develop an integrated, conversion-driven campaign that can act as a stimulus to partners and will be in conjunction with tour operators, airlines, and OTAs around the world. The purpose of this approach is to drive short- and long-term bookings.

**Tactic 1:** Leverage consumer channels (Facebook primarily) to prospect for and drive consumers to tour operator, OTA, and airlines websites to convert into travel bookings to the USA.

**Tactic 2:** Re-engage in-kind media partnerships and shift to predominantly banner inventory running an aggressive conversion focused messaging campaign driving consumers to tour operator, OTA, and airlines websites to convert for travel to the USA.

**Tactic 3:** Launch affinity campaigns and the paused spring 2020 multi-channels. Via a mix of awareness (market-specific vendors, plus GDN and Facebook) and activation platforms (Expedia), take consumers down the funnel from inspiration to consideration to booking.

**Tactic 4:** Negotiate strategic trade and airline partnerships on a market-by-market basis.



### OBJECTIVE 4: BRING TO LIFE POST-COVID OPPORTUNITIES

Communications need to bring to life the incredible possibilities of a USA trip in a post-COVID reality. The travel landscape will look different and the experiences will have new guidelines and protocols, and Brand USA must reinforce that a trip to the USA is still fulfilling in the next normal.

**Tactic 1:** Global influencer program “On the Road Again” ahead of broader, more robust marketing strategies to communicate possibility through itinerary development.

**Tactic 2:** Always-on communications across all consumer channels to convey post-COVID travel opportunities (web, social, OLV, influencer).

**Tactic 3:** Earned media strategy aimed at showcasing new possibilities through global coverage.



### OBJECTIVE 5: OPEN THE TOOLBOX

Brand USA must ensure the platform it puts forth provides value to partners by highlighting the breadth of destinations across the USA and offering a platform that is easy for interested partners to adopt.

**Tactic 1:** Asset toolkit with easily adaptable creative for partners to leverage in their media strategies.

**Tactic 2:** Continue to leverage Brand USA Global Marketplace as a platform to unveil recovery efforts as well as a place that allows partners to conduct business on an ongoing basis.

**Tactic 3:** Communicate all partner opportunities on corporate website and other corporate channels to ensure interested partners have every opportunity to participate.



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