



50 States, the District of Columbia, Five Territories
ONE UNITED EFFORT

Brand USA Fiscal Year 2013 Annual Report

October 1, 2012, through September 30, 2013



Brand USA



USA

DiscoverAmerica.com

Brand USA

Brand USA was established by the Travel Promotion Act to spearhead the nation's first international marketing effort to promote the United States as a premier travel destination and communicate U.S. entry policies and procedures.



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Brand USA is the destination marketing organization for the United States.

Established by the Travel Promotion Act in 2010 to spearhead the nation's first international marketing effort to promote the United States as a premier travel destination and communicate U.S. entry policies and procedures, Brand USA's mission is to increase international visitation to the USA in order to fuel the U.S. economy and enhance the image of the United States worldwide.

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs and benefits virtually every sector of the U.S. economy.

Formed as the Corporation for Travel Promotion and now doing business as Brand USA, the public-private entity began operations in May 2011 and works in close partnership with 400 organizations to invite people all over the world to explore the exceptional, diverse and virtually limitless travel experiences and destinations available in the United States of America.

This first-ever effort for the United States is helping to put the USA on equal footing with other countries' tourism efforts and bring millions of new international visitors to our nation each year. No U.S. taxpayer dollars are used to fund Brand USA's marketing efforts.

In May 2012, Brand USA launched the nation's first-ever tourism campaign that invites to the world to "Discover this Land, Like Never Before." The inaugural campaign demonstrated significant increases in intent to visit the United States and is now driving measurable results. According to a recent study by Oxford Economics, Brand USA's marketing initiatives in fiscal year 2013 alone resulted in an incremental increase of 1.1 million visitors to the USA and total impact on the U.S. economy of \$7.4 billion in spending, which supported more than 53,000 new jobs.

About this Report

May 15, 2014:

In compliance with the Travel Promotion Act, Brand USA submits this report for fiscal year 2013 to the Secretary of Commerce to transmit to Congress as an update on the organization's progress, activities, financial condition, and accomplishments for the period October 1, 2012 to September 30, 2013.

Although select information for fiscal year 2014 to date is also included in this report, it is important to note that these accomplishments represent only highlights of the organization's progress beyond fiscal year 2013. In May 2015, the comprehensive and official report for fiscal year 2014 will be published.



Mission and Vision

Our Mission

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

Our Vision

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

Letter from the Chair of the Board



As chair of the Brand USA board of directors, I am pleased to present the Corporation for Travel Promotion's Annual Report to Congress for the fiscal year-ended September 30, 2013.

FY2013 was a year of partnerships, programs and progress. We welcomed new partners, more than doubled our partner contributions, expanded our partnership program offerings four-fold, and completed our first ROI study that demonstrated the effectiveness of our marketing strategies.

Following the successful launch of the United States' first nationally coordinated marketing campaign in FY2012, we took our consumer, trade and co-operative marketing programs to new markets, further strengthening our global infrastructure and international reach.

The team at Brand USA is lean and possesses a strong combination of destination marketing experience and expertise in the key disciplines that ensure efficient and effective operations. The team ensures that the vast majority of its spend goes to the international marketing effort—with only about 10 percent of the budget supporting administrative expenses.

An important part of the organization's focus is on collaborating with our Federal partners to realize the goal of the National Travel and Tourism Strategy to welcome 100 million international visitors to the United States in one year by 2021. To this end, we supported promotional efforts and provided marketing materials for a variety of Federal efforts. While the 100 million visitor goal is a challenging one, I believe Brand USA can successfully support this effort by concentrating its marketing programs and campaigns in the right combination of emerging and established markets, and by working with its partners—including U.S. suppliers and international buyers of travel, our Federal partners, and the many organizations outside of the travel industry who have a vested interest in increasing international visitation to the United States.

Now halfway through FY2014, we continue to build on our success. By the end of this calendar year, our consumer campaign will have been present in 10 markets: Australia, Brazil, Canada, China, Germany, Hong Kong, Japan, Mexico, South Korea and the United Kingdom - representing markets that generate more than 75% of inbound travel to the United States. Every 1 percent increase in visitation from these markets will help us welcome 500,000 more travelers and \$1 billion in spending, which goes a long way in strengthening the U.S. economy.

While we have made much progress in regaining our share of the world travel market, the work of Brand USA is needed now more than ever. We look forward to continuing our work to strengthen the U.S. economy and enhance the nation's image worldwide by promoting the United States as the world's premier travel destination.

Sincerely,

Daniel J. Halpern
Chair of the Board, Brand USA
President & CEO, Jackmont Hospitality

Letter from the President and CEO



We are pleased to present the Brand USA annual report for the year-ended September 30, 2013. Within these pages you will find updates on Brand USA's accomplishments during its second full year of operation.

For Brand USA, this was a year of expansion and success. We concentrated our efforts on developing new cooperative marketing platforms and programs that generate a strong return on investment for participants, expanding our trade and consumer initiatives into new markets, and driving results.

As the United States' destination marketing organization, we work to add and create value for the nearly 400 organizations we are proud to call partners. These partners include Federal agencies; city, state, and regional tourism offices; travel brands; and other organizations within and outside the travel industry. It is with their generous support that we are able to successfully pursue our mission. Together, we are marketing to the world that the USA is a diverse nation, full of incredible destinations and experiences.

By all accounts, our efforts are working. In fact, according to a study conducted in February 2014 by Oxford Economics, our marketing initiatives have had a significant and positive impact on the U.S. economy. The study, which looked at the eight markets where we had fully deployed an effective combination of consumer, co-op and trade marketing during FY13 showed that our strategies generated:

- 1.1 million incremental visitors to the United States, who spent
- \$3.4 billion on travel and fare receipts with U.S. carriers, resulting in
- \$7.4 billion in total sales, which supported
- More than 53,000 new jobs

These results demonstrate a 47:1 return on marketing investment, and generated nearly \$1 billion in incremental local, state and Federal tax receipts.

We accomplished a lot during FY2013, and these results only scratch the surface of our success in achieving our mission. Today, we are fully deployed in 10 markets, with international travel trade marketing activity in 20 markets and marketing initiatives active in more than 30 markets.

With the continuing and growing support, commitment and engagement of our partners, we look forward to even more success in regaining our share of the global travel market.

Together we are marketing the USA!

Christopher L. Thompson
President and CEO, Brand USA



How We Market the USA

Promotional Activities

Throughout the year, Brand USA utilized a number of marketing-driven cooperative 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. Our programs include consumer, co-op and trade outreach opportunities that add and create value for our partners.

Consumer Marketing Campaigns

The “Land of Dreams” consumer campaign continues to be fundamental to Brand USA’s aim to create awareness and inspire travel to the United States. The creative featured in our campaign advertisements was informed by consumer research and will continue to be enhanced by learnings from consumer testing in target markets. In addition to the tangible results these campaigns deliver, they also provide opportunities for our partners to reach international travelers through a combination of any or all of the following: broadcast, out-of-home, print, digital and event marketing.

Co-op Marketing Programs

These programs make up the majority of our marketing efforts and deliver an array of marketing options to increase awareness, visitation and spend.

Brand USA Originals

Brand USA Originals are 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.

Brand USA Affinity Programs

Affinity programs are programs that Brand USA has developed with media, 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 inspire USA travel experiences.

Market Specific Programs

Through market specific programs, Brand USA connects partners with its in-country experts to ensure co-op marketing efforts are deployed in the right markets. Programs are designed for either partner launch or expansion in established or emerging markets. These programs are ideal for cities and states that are entering a market for the first time.

Media & Public Relations

Brand USA works with media outlets to provide opportunities to increase our partners’ global reach. Brand USA has access to journalists, online newsrooms and—coming soon—a national event calendar that will allow partners to promote events happening in their communities.



Trade Outreach

Brand USA currently works with its expanding network of international representatives, Visit USA committees, and travel and tourism advisory boards to support participation in numerous trade activities, including:

- Trade Shows
- Sales Missions
- Road Shows
- Themed Events
- Training Initiatives
- MegaFams

Brand USA's strategic marketing outreach with the travel trade provides ample opportunities to elevate our partners' global presence. Trade shows, sales missions, roads shows and training seminars frequently include collaboration with U.S. embassy personnel and Visit USA committees.

Trade Shows

Throughout the year, Brand USA hosts 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 inspire future travel to the United States.

Brand USA serves 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 of all shapes and sizes participating as exhibitors. Participating organizations retain their own identity yet benefit from being part of a more 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.

Unified Brand USA pavilions provide exhibitors:

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

Sales Missions

Another essential component of Brand USA's trade outreach includes sales missions. These Brand USA-hosted events invite travel industry professionals in key markets to meet with U.S. organizations at a designated international location. Through a series of planned events, Brand USA and sponsor partners are able to connect directly with international travel buyers, including tour operators, airlines, travel agents, incentive and meeting planners and media, and provide a more in-depth look at U.S. destinations and experiences in order to increase actual travel bookings to the United States.

Building on the success of our first missions to India in 2012 and 2013, we have expanded our reach into other key markets and currently have sales missions scheduled as follows:

- China (October 2014*)
- India (September 7-13, 2014)
- Hong Kong (November 11-12, 2014)

**dates to be announced*

Road Shows

Our outreach also includes taking participants directly to the travel trade in international markets via Road Show events. Brand USA and partner organizations are able to connect directly with tour operators, travel agents and other travel buyers through a series of seminars, receptions and events where participating partners acquire the knowledge and information needed to better promote the United States as a travel destination.

Themed Events

Based on market need and opportunity, Brand USA also organizes custom themed events in key international markets that position and promote the United States as the go-to travel destination. These events are generally celebratory programs, themed around specific holidays and experiences to help promote destinations, travel brands and other organizations.

Training Initiatives

Two distinct Brand USA travel trade training initiatives 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.

USA Discovery Online Training Platform

This experience-based, hands-on training platform features a variety of destination modules to inspire and motivate the travel industry to sell "this land like never before."

Modules focus on certain states or areas, and travel agents and tour operators can earn specialist badges as they complete each section. Having already successfully launched the training platform in the U.K., we are now introducing the platform into other markets, including:

- Australia
- India
- China
- Brazil

Training Seminars

Brand USA's international representation firms and partner organizations also present in-market training seminars that focus on a specific experience or region in the United States. These seminars are scheduled throughout the year and provide a targeted approach to promoting U.S. travel destinations.

MegaFams

Launched by Brand USA in 2013, familiarization tours, or “fams,” are an integral part of the organization’s marketing strategies to create awareness of the diverse destinations and travel experiences that are 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 organizes and coordinates these diverse U.S. travel experiences in order to more fully promote multiple destinations. They are especially effective in driving awareness of and motivating the travel trade to sell beyond-the-gateway experiences 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. Through Brand USA MegaFam experiences, travel agents and tour operators are better informed, empowered and inspired to sell a multitude of U.S. destinations. MegaFam trips during 2014 include:

German MegaFam with airline partner Lufthansa

May 6-11, 2014

Eight itineraries covering the following cities and states and surrounding regions: New York; Washington, DC; Miami; Chicago; Dallas; Denver; Los Angeles; and Seattle

UK MegaFam with airline partners American Airlines and British Airways

May 15-22, 2014

Seven itineraries covering 21 states and the District of Columbia:

- *West Coast Wonders*: California, Nevada, Arizona
- *Desert Dreams*: Illinois, Utah, Colorado, New Mexico
- *Meet the Mountains*: Colorado, Nebraska, South Dakota
- *Natural North East*: Massachusetts, New Hampshire, Vermont, New York
- *Capital Coast Adventures*: District of Columbia, Maryland, Virginia
- *Southern Charms*: North Carolina, Georgia, South Carolina
- *Fantastic Florida*: Florida
- *Grand Finale*: Austin



MegaFam trips offer unique travel adventures beyond gateway cities, empowering tour operators through experience.



Australia MegaFam with airline partner Qantas November 2014 (dates to be announced)

Six itineraries covering the following cities and states and surrounding regions: New York, Seattle, Las Vegas, Los Angeles, San Francisco and Portland with the finale in Hawaii.

Advisory Boards

In each market where Brand USA has international offices we establish advisory boards. These advisory boards are comprised of influential tour operators, travel agents and other in-market travel professionals. Through collaboration and ongoing discussion with these important boards, either directly with the travel industry or in collaboration with Visit USA committees, Brand USA gains important feedback and recommendations as we develop new marketing programs and promotional campaigns.

We are continually developing and improving our programs and platforms in order to add and create value for our partners. Our objective is always to generate a strong return on investment through increased visitation and spend. As the nation's destination marketing organization, Brand USA is committed to positioning and promoting the United States and all it has to offer as a compelling choice for international travelers.



Highlights and Timeline of Progress

FY2013 Highlights

Brand USA has made notable progress toward its mission of increasing international visitation to the United States—and we've done so by working with nearly 400 partners that represent leading brands both within and outside the travel industry.

Highlights over the past year include:

- Generating 1.1 million incremental visitors to the USA from eight markets—representing a 47:1 return on marketing investment.
- Expanding our consumer brand campaign to 10 key markets.
- Expanding our travel trade outreach to 20 markets.
- Expanding our marketing initiatives to more than 30 markets.
- Expanding our digital presence to include 45 channels in 10 languages, as well as a social community comprised of 4.6 million unique visitors, 3.6 million fans, and impressive positive sentiment in the 90% range.
- More than doubling our program offerings with cooperative marketing opportunities that add or create demonstrated value for our partners.
- Hosting USA pavilions at 24 international travel shows.
- Hosting our inaugural MegaFam tour with 100 travel agents from the UK.
- Launching a comprehensive travel trade training platform, the USA Discovery Training platform.
- Integrating our initiatives to support the National Travel and Tourism Strategy and building programs that leverage the best of our public-private collaboration to inspire increased travel to the United States.
- Building the nation's largest international representation network.
- Keeping our administrative costs to approximately 10% a year—ensuring that the vast majority of our budget is spent on marketing the United States as a premier travel destination.
- Increasing partner contributions from \$58 million in FY2012 to \$128 million in FY2013.
- Increasing the average cash contribution from returning partners by 17 percent—from \$639,000 per partner in FY2012 to \$748,000 per partner in FY2013.
- Achieving a 97 percent partner retention rate while expanding our partnership base 30 percent from 260 in FY2012 to 340 in FY2013.
- Rolling out a comprehensive research program to provide market intelligence and track the success of our marketing efforts.
- Establishing the Brand USA media and travel trade online networking platforms with TravTrade/TravMedia.

Timeline of Progress

➤ October 2011

The organization begins its first full fiscal year of operations.

➤ November 2011

The Corporation for Travel Promotion unveils its new brand name and identity in front of an international audience of more than 47,000 travel professionals at World Travel Market in London on November 7, 2011. The organization will now do business as Brand USA with a new logo reflecting the diversity and limitless possibilities that the United States of America offers travelers.

Brand USA launches a new business-to-business website, www.TheBrandUSA.com, to reflect its new brand name.

Randy Garfield, executive vice president, Worldwide Sales & Travel Operations of Disney Destinations, and president, Walt Disney Travel Company, is appointed to the board of directors on November 4, 2011, replacing Al Weiss, also of Disney.

➤ December 2011

The U.S. Travel Association donates the DiscoverAmerica.com website and global url rights to Brand USA. The website will be used to promote the United States as a premier destination to international travelers.

➤ January 2012

President Obama signs Executive Order 13597 on January 19, 2012, announcing new administrative initiatives to significantly increase travel and tourism in and to the United States. The Executive Order calls for the creation of a Task Force on Travel and Competitiveness chaired by the Secretaries of Commerce and the Interior to develop a government-wide National Travel and Tourism Strategy.

Brand USA holds its first webinar with destination marketing organizations across the country, as well as two webinars with the U.S. Commercial Service around the world.



February 2012

Marriott, Disney and Best Western become the first Founding Partners of Brand USA—each committing at least \$1 million in cash along with in-kind commitments to fund advertising, new media, marketing, in-country representation, international tradeshow presence, research and other forms of marketing to international travelers. The funding also will be used to build sustaining programs such as sponsorship and cooperative marketing opportunities that will ensure a long-term source of revenue for Brand USA.

The first advisory group meetings are held for Marketing, Business Development and Global Insights/Research.

March 2012

Brand USA hires its first international representation firms to support the organization's marketing efforts in five markets (Brandmasters for Germany, Austria, and Switzerland; Black Diamond for the United Kingdom and Ireland).

Brand USA takes center stage at ITB Berlin in the USA Pavilion with an impressive welcome area and lounge for attendees to network and learn more about travel and tourism opportunities. The organization caps off its participation at the industry tradeshow by hosting a networking event on the exhibition floor for tradeshow participants highlighting U.S. culture with food, music and dance. A highlight of the event was Philip D. Murphy, U.S. Ambassador to the Federal Republic of Germany, who met with members of the Brand USA team and addressed guests at the event. ITB Berlin is significant because more travelers from Germany visit the United States than those from any other country in continental Europe. In addition, it is the world's leading travel tradeshow, with over 110,000 trade visitors and over 14,000 participants representing 180 countries.

April 2012

Brand USA unveils the United States' first-ever comprehensive marketing campaign on April 23, 2012, in Los Angeles at International Pow Wow (IPW), the largest U.S. travel trade show. The fully-integrated campaign showcases the diversity of experiences available in the United States in a fresh and unexpected light, and invites visitors to "Discover this land, like never before."

At the heart of the campaign's TV spots is an original song, "Land of Dreams," written and performed by Grammy-award winning artist Rosanne Cash, daughter of American music legend Johnny Cash.

The new DiscoverAmerica.com launches featuring a unique "suitcase" feature that serves as a convenient travel planning tool and allows visitors to save and share itineraries with family and friends. The first meeting of the rural marketing advisory group is held during the IPW in Los Angeles.

During the month, Brand USA also established international representation in Japan and South Korea, as well as trade-only representation in Brazil.

May 2012

The White House releases the National Travel and Tourism Strategy to make the United States of America a more attractive and accessible destination than ever before. The principal goal of the strategy, which cites the work of Brand USA, is to increase the number of international visitors to the United States from 62.3 million in 2011 to 100 million by 2021.

The first wave of Brand USA's global marketing campaign launches in Canada, Japan and the United Kingdom.

➤ June 2012

Caroline Beteta is named vice chair of the board and interim president and CEO of Brand USA when Jim Evans departs the organization. She immediately puts in place a plan to accelerate the organization's transition from a start-up venture to a fully functioning destination marketing organization by expanding partnerships and programs.

Brand USA and the State Department launch the digital campaign "50 States in 50 Days." The campaign runs across State Department digital and social properties. Beginning with Delaware on June 1 and ending with Hawaii on July 21, the campaign highlights one state per day in order of incorporation into the Union. Washington, D.C. is featured on July 4.

➤ July 2012

Brand USA initiates a formal search for a president and CEO with the goal of announcing and appointing a destination marketing executive by the time the organization enters its second full year in operation.

➤ August 2012

Brand USA launches television submissions site in the United Kingdom to consider programming ideas to be broadcast in the UK and Europe showcasing unique experiences within the United States.

➤ September 2012

Acting Secretary of Commerce Rebecca Blank appoints four members to Brand USA's Board of Directors, including one new member and three reappointments. In the announcement, she notes that "International visitors to the United States play a critical role in creating jobs here in the U.S., boosting both our regional and national economies. We are working to meet the President's goal of doubling travel and tourism exports and achieving the goals developed for the National Travel and Tourism Strategy. Having this diverse and talented group of industry leaders on the Board will help strengthen our ability to promote the U.S. as a top tourist destination." The newly appointed and reappointed members include:

- Arne Sorenson, President and CEO, Marriott International, Inc. (new appointment)
- Caroline Beteta, President and CEO, Visit California (reappointment)
- George Fertitta, CEO, NYC & Company (reappointment)
- Roy Yamaguchi, Owner and Chef, Roy's Restaurants (reappointment)

Travel and tourism leader Christopher L Thompson is named president and CEO of Brand USA, effective November 1, 2012.

Prior to joining Brand USA, Chris led the state of Florida's destination marketing efforts as president and CEO of VISIT FLORIDA, one of the nation's most successful destination marketing organizations.

The metrics for the first stage of the "Land of Dreams" consumer marketing campaign are announced—and demonstrate how the national marketing effort is paying off—intent to visit, consumer engagement and sentiment significantly higher in the campaign launch markets.

- Intent to visit increased significantly among campaign recognizers—up 12% to 22% in Canada, Japan and the United Kingdom.
- Survey respondents in Japan said that the campaign made them feel that the U.S. is a place where you always feel welcome and described the nation as "adventurous," "energetic" and "optimistic."
- In Canada, 82% of survey respondents said the campaign strengthened the perception that the United States is "a place to indulge myself," and 75% found it to be a "place to relax."



- In the UK, the United States is described as “energetic,” “has something for everyone,” “optimistic” and “a place with limitless possibilities.”
- DiscoverAmerica.com has welcomed 890,000 unique global visitors. More importantly, these are qualified visitors that have accessed 2.3 million pages and averaged 2.57 minutes on the site.
- On YouTube, the Brand USA videos have been viewed 636,000 times.
- The Discover America Facebook site has 78,000 followers.
- On Twitter, Brand USA has 7,800 followers.
- The “Land of Dreams” song has been downloaded more than 25,000 times.
- In the social media sphere, favorable sentiment remains at 99%.

British Airways becomes Brand USA’s first founding airline partner.

Brand USA leads the largest-ever delegation of senior U.S. travel representatives to India with its first sales mission. The mission runs September 9-14. The mission, which sold out within 30 days, consists of 50 delegates representing 35 U.S. destinations and companies who visited New Delhi and Mumbai. In earlier years, this mission was organized by the U.S. Travel Association, making this the sixth travel trade mission from the United States to promote tourism in the Indian market.

Brand USA closes its first full year in operation with 260 partners who contributed \$58 million in cash and in-kind to the global marketing effort.

Brand USA partners with Your Golf Travel, the largest golf tour operator in Europe, to promote travel to the United States in conjunction with the Ryder Cup held in Medinah, Illinois. The program includes a 32-page “Destination USA” supplement dedicated solely to the promotion of the leading golf travel destinations in the United States.



📅 **October 2012**

Brand USA begins its second full year in operation.

The Japan Association of Travel Agents (JATA) and Brand USA has announced the launch of the Japan-U.S. Tourism Exchange Year. The nationwide one-year initiative runs from September 2012 through August 2013 to jointly stimulate tourism between the two countries. The goal of the Japan to U.S. effort is to generate 3.75 million inbound travelers from Japan to the United States by the year 2016.

📅 **November 2012**

Chris Thompson takes the helm of Brand USA as president and CEO.

Brand USA hosts its second USA Pavilion at World Travel Market in London with increased participation from U.S. exhibitors.

📅 **January 2013**

Brand USA hosts its first USA Pavilion at FITUR, the leading trade fair for inbound and outbound Ibero American markets. In 2013, 9,979 exhibiting companies from 167 countries/ regions, 116,157 trade participants and 91,082 people from the general public, met during FITUR to transform leisure into business and business into development. Moreover among the participation figures of note was the presence of 7,212 journalists from 59 countries, a turnout that demonstrates the importance of FITUR on the international circuit of tourism sector events.

📅 **February 2013**

The Brand USA consumer campaign including television, out-of-home, print begins running in Canada through April.

Brand USA hosts USA Pavilions at BIT Italy in Milan and at Vitrina Turistica Anato, one of the leading international events based on the tourism industry.

➤ **March 2013**

Brand USA opens its international representation office in China.

The consumer campaign begins in Japan and runs through April.

Brand USA is a lead sponsor of the World Baseball Classic and achieves global exposure, including record TV viewership internationally. Playoff games are held in Japan, Taiwan, Puerto Rico, Miami and Phoenix leading up the championship games held in San Francisco. Brand USA conducts media outreach around the games and works with the Department of Homeland Security to promote entry policy and awareness of the ESTA process in conjunction with games played in Taiwan. Global Entry is promoted during the games played domestically.

For the third year, Brand USA hosts a USA Pavilion at ITB Berlin, the world's largest travel trade show.

Brand USA also has its first presence in Russia at MITT, Russia's leading and largest travel exhibition, in conjunction with Visit USA Russia.

An additional USA Pavilion is hosted at TUR, Scandinavia's leading trade fair for the travel and tourism industry.

➤ **April 2013**

Brand USA begins a six-month media partnership with the Guardian in the United Kingdom—showcasing destinations and experiences to, through, and beyond the gateways.

Brand USA hosts a USA Pavilion at the inaugural WTM Latin America trade show and at the China Outbound Travel & Tourism Market (COTTM) trade show.

➤ **May 2013**

Brand USA hosts its inaugural MegaFam to the United States in partnership with British Airways and American Airlines. The familiarization tour consists of seven simultaneous itineraries that bring 100 top agents from the United Kingdom to the United States.

Brand USA hosts its second USA Pavilion at the Arabian Travel Market (ATM), the leading travel and tourism event in the Middle East for inbound and outbound tourism professionals.

Brand USA opens an international representation office for Taiwan and Hong Kong.

Marketing partnerships are established with United Airlines, Brand USA's first domestic-based airline partner, out of South Korea.

Brand USA and Hainan Airlines hold a joint press conference announcing direct flights between Beijing and Chicago.

➤ **June 2013**

For the second year, Brand USA is the premier sponsor of IPW, which is held in Las Vegas the first week in June. This event, hosted by the U.S. Travel Association, includes pre-scheduled, computer-generated business appointments that result in the generation of over \$3.5 billion in future international arrivals to the United States. New programs and marketing expansion are announced.

The Brand USA consumer campaign begins running in Brazil and Mexico through July. Also this month, Brand USA's digital and social channels in Latin America, which have been live in Brazil since July 2012, see dramatic growth—reaching 150,000 Facebook fans in Brazil by the end of this month. To date, nearly 170,000 visitors come to the Brand USA Facebook pages every month, rising to nearly 300,000 per month.

Brand USA launches new agent online training platform, the USA Discovery program. Housed at www.USADiscoveryProgram.co.uk, agents can find straightforward information on regions and U.S. states and territories, as well as experiences and holiday themes to provide a holistic overview of the USA as a destination and to enable cross-selling on all aspects of sales to the USA. Agents can take interactive quizzes to become USA Specialists and receive award badges as a recognized qualification of expertise.

Brand USA hosts its USA Pavilion at the Beijing International Tourism Expo (BITE), is Asia's leading annual travel and tourism event. Organized since 2003, BITE is one of the fastest growing trade shows in the industry, attaining a quality ranking in Asia, and becoming an important and influential platform for tourism networking and business transactions.

Brand USA opens its international representation office in India.

➤ July 2013

Brand USA and Air Berlin launch a joint promotion promoting travel to the United States.

Brand USA international representation offices are opened in Australia and New Zealand. To date, Brand USA now has international representation covering Australia, Austria, Brazil (trade only), Canada (trade only), China, Germany, Hong Kong, India, Ireland, Japan, New Zealand, South Korea, Switzerland, Taiwan, and the United Kingdom.

Brand USA's consumer websites GoUSA.cn and GoUSA.tw launch in China, Hong Kong and Taiwan supported by social media programs, plus search, digital and social advertising.

Brand USA begins offering travel partners enhanced cooperative programs with Google Lightbox. The Brand USA program with Google represents the first utilization of this tool by the travel industry.

Brand USA and STA Travel partner to promote student travel to the United States—reaching 1 million potential travelers.

Brand USA begins a marketing campaign with Qatar Airways to promote travel from India to the United States.

Japan Airlines launches new San Diego flight campaign with Brand USA.

➤ August 2013

Brand USA promotes travel to the United States from Canada at the annual NASCAR event held at Watkins Glen International raceway in upstate New York.

Brand USA holds a Ski & Golf Fair Day in Brazil and attends the Visit USA Costa Rica and Guatemala shows.

Brand USA radio spots beginning running on RTL and Spree Radio in Germany, promoting 100 trips to U.S. cities.

Brand USA launches the "Let's Go America" campaign in Japan.

➤ September 2013

Australia and the United Kingdom feature channel-specific programs; digital for Australia, and out-of-home for the United Kingdom in partnership with Expedia, promoting the U.S. ski experience.

Brand USA hosts its first media familiarization press trip from Germany to the United States. Tour stops include destinations in Alabama, Kentucky and Tennessee with the theme "Southern Food & Whisky." Transportation partners include Delta Air Lines and Alamo.

Brand USA hosts its second annual sales mission to India. Participants include 38 delegates, representing 28 organizations from U.S. destinations, attractions, hotels and destination

management companies. The group holds buyer-seller meetings with tour operators, travel agents, airline representatives and the media in Mumbai and New Delhi.

Brand USA's "My Hawaii" campaign with Ignite Travel begins in Australia.

United Airlines is announced as a founding partner, supporting Brand USA's marketing initiatives in Taiwan, Hong Kong and China. In addition, the Discover America feature launches on United Airlines' in-flight magazine "LEADER'S REVIEW" in Japan.

Brand USA's media campaign with KLM Air France launches, as well as a joint consumer campaign with Lufthansa, Meier's Weltresisen, Dertour, Explorer Fernreisen and Canusa, in Germany.

Brand USA hosts USA Pavilions at the China Incentive, Business Travel & Meetings Exhibition (CIBTM), the Brazilian Travel Agencies Association (ABAV) show, the JATA Tourism Forum & Travel Showcase, FIT Argentina, the International French Travel Market (IFTM) Top Resa, and FITA in Mexico City.

Brand USA partners with the Italian Geographic Society to bring the exclusive "Go West!" exhibit to Rome. The exhibit features newly discovered photos of the Old West by actor and photographer Timothy O'Sullivan, which had been preserved in the archives of the Italian Geographic Society since the late 1800s. The photographs are shown side by side with the works of Antonio Politano, Italian photojournalist and author, which retrace the steps of Timothy O'Sullivan's photo essay, as well as with pages from a 1940s Italian comic book series that tells the story of old West hero Tex Willer. The pages of the comic book (displayed with the old and new photography) depict scenes and places in the West where Timothy O'Sullivan acted in various westerns.

Brand USA presents at the annual meeting of the American Indian Alaska Native Tourism Association (AIANTA). Organized in 1999, AIANTA is a nonprofit association of Native American tribes and tribal businesses organized to advance Indian Country tourism.

Brand USA partners with Air Canada to embark on a high-profile, multi-media campaign promoting travel to the USA. The partnership debuts in Toronto and Montreal and includes out-of-home, print, digital and radio promotions.

Brand USA launches a new module promoting music, culture and historical experiences on the USA Discovery Program agent training site in the United Kingdom. The module joins three existing modules on the Program—Big City Buzz, Great Outdoors and Winter Sports.

Brand USA completes its second full year in operation with 340 partners who contributed nearly \$130 million to the nation's marketing efforts—representing more than double the level of contributions received in FY2012.





➤ **October 2013**

Brand USA begins its third full year in operation.

The Brand USA consumer campaign runs in Hong Kong, Taiwan, South Korea and China.

Brand USA welcomes nearly 1,000 Chinese travelers to the United States through a joint effort sponsored by Brand USA, the China National Tourism Administration (CNTA) and NYC & Company. The event is promoted as *Welcome China*, and includes participation by 10 city/provincial tourism offices and 14 key travel agencies in China who developed a variety of U.S. itineraries that include stops in major U.S. cities plus one stop in New York City on October 8 where all participants attend a special evening event at the Metropolitan Museum of Art. Contributing partners include Macy's, the Metropolitan Museum of Art, Veolia Transportation, The Juilliard School, Hainan Airlines and Sina.com. Following the event, Brand USA participates in the China-U.S. Tourism Leadership Summit in Chicago organized by the U.S. Travel Association.

Brand USA hosts USA Pavilions at ILTM America's in Mexico; the China International Travel Mart (CITM) in Shanghai; TTG Incontri in Rimini, Italy; the Taipei International Travel Fair (ITF); and ITB Asia (Singapore). In addition, Brand USA is the official tourism partner for World Routes Development Forum, the world's largest airline conference, which takes place in Las Vegas—the first time any Routes event has been held in the USA. The 19th annual event is the largest Routes show to date, attracting 3,000 high profile delegates from more than 125 countries worldwide and is co-hosted by the Las Vegas Convention & Visitors Authority and Las Vegas McCarran International Airport. The partnership is part of Brand USA's strategy to develop programs and platforms that will increase airlift from international markets to the United States.

➤ November 2013

The Brand USA integrated consumer campaign comprised of broadcast, print, and out-of-home begins running in Brazil.

Brand USA hosts its first MegaFam from Australia to the United States in partnership with Qantas Airlines. Destinations included New York and Boston; Orlando and Miami, Florida; Phoenix, Scottsdale, Mesa and Flagstaff, Arizona; Dallas and Fort Worth, Texas; Baton Rouge and New Orleans, Louisiana and their surrounding areas.

Brand USA's in-flight media partnership with Asiana Airlines begins in South Korea.

Brand USA opens an international representation office covering Mexico and Central America.

English TV personality, travel writer, actor and adventurer, Charley Boorman embarks on a seven-week expedition traveling over 8,000 miles across 22 states to showcase the eclectic cultures, history, landscapes, locals and adventure that the USA has to offer. The series is promoted and broadcast as part of Charley Boorman's Extreme Frontiers online and on Channel 5 in the United Kingdom in 4 one-hour programs.

Brand USA hosts a sales mission to Taiwan, Thanksgiving-themed dinners for the travel media in India, and USA Pavilions at World Travel Market in London and EIBTM in Spain.

Brand USA's international marketing partnership with the National Football League is announced as part of Brand USA's live entertainment platform, leveraging the NFL's International Series games played in Canada and the United Kingdom during the season. The platform provides opportunities for Brand USA's partners to promote increased visitation and spend in the United States by showcasing the range of live entertainment offerings in the USA.

Brand USA teams up with ESPN to produce a suite of 51 new sport tourism and destination feature videos, as well as a fun new game to help United Kingdom residents find their perfect match when it comes to sports teams in the USA. Housed on DiscoverAmerica.com, the 2-3 minute videos promote spectator, competitive and recreational travel across the 50 states and the District of Columbia.

Brand USA launches a new module educating the travel trade on fly-drive experiences available in the United States. The module features information on classic American road trips, as well as the roads less traveled across the United States in order to truly travel like a local. The USA Fly-Drive Specialist module joins five existing modules on the Program – Big City Buzz, Great Outdoors, Culture & Heritage, Winter Sports and the recently launched Coastal Escapes; plus the Regional Expert badge, which users must complete initially.

➤ December 2013

U.S. Secretary of Commerce Penny Pritzker appoints two new board members and re-appoints two board members to Brand USA's board of directors. The newly appointed and reappointed board members include:

- Randy Garfield, Executive Vice President, Worldwide Sales and Travel Operations, Disney Destinations and President, Walt Disney Travel Company (reappointment)
- Andrew Greenfield, Partner, Fragomen, Del Rey, Bersen and Loewy, LLP (new appointment)
- Barbara Richardson, Chief of Staff, Washington Metropolitan Area Transit Authority (new appointment)
- Mark Schwab, Chief Executive Officer, Star Alliance Services (reappointment)

The Brand USA consumer campaign begins running in Germany featuring Lufthansa and tour operators such as Canusa, Dertour, Explorer and Meiers. Brand USA opens its international representation office in Brazil.

Hawaiian Airlines/Asiana Airlines marketing partnership with Brand USA launches in South Korea.

🔍 **January 2014**

Thomas Cook and Brand USA partner to launch the Discover America United Stories of America competition, a pan-European social media competition that offer participants the chance to win a holiday to the USA every month. The United Stories of America promotion runs simultaneously across the United Kingdom, Germany, Belgium and the Netherlands through April 2014.

USA Pavilions are hosted at Vakantiebeurs (Utrecht, The Netherlands); FITUR Madrid; and SATTE in New Delhi, India.

🔍 **February 2014**

Brand USA releases the results of a study by Oxford Economics that shows its marketing is having a significant and positive impact on U.S. international arrivals and the U.S. economy. The study includes analysis of eight markets – Australia, Brazil, Canada, Germany, Japan, South Korea, Mexico and the United Kingdom – where Brand USA fully executed consumer, trade outreach and co-op programs during FY2013. As detailed in the report, for the year-ended September 30, 2013, Brand USA's marketing campaigns generated 1.1 million incremental visitors to the United States—a 2.3 percent increase over growth that would have occurred without Brand USA marketing initiatives. These additional visitors spent \$3.4 billion in the United States, including travel and U.S. carrier fare receipts. This spending fueled the U.S. economy by generating \$7.4 billion in business sales, \$3.8 billion in GDP and \$2.2 billion in personal income, as well as supporting more than 53,000 new jobs. The results equate to a marketing return on investment of 47:1 based on Brand USA's marketing expenses of \$72 million and incremental international visitor spend of \$3.4 billion. Incremental local, state and Federal tax receipts were nearly \$1 billion.

The Brand USA consumer campaign begins running in Australia through March.

The Hospitality Sales and Marketing Association International (HSMAI) recognizes Brand USA with three 2013 Adrian Awards, including:

- Gold in Advertising (Travel Trade Brochure) for the Discover America Inspiration Guide
- Silver in Advertising (DVD/CD/VIDEO Consumer/Group Sales/Travel Trade) for the organization's In-Language Content Program
- Gold in Digital Marketing (Web Ad) for the Google Engagement Ads that create a beautiful interactive travel guide.

Brand USA announces a culinary initiative at Destination & Travel Foundation Dinner, which this year honored the James Beard Foundation with the annual Spirit of Hospitality Award. The new initiative will kick off in July 2014 with the launch of a culinary guide to the United States featuring of the best-known American chefs and the destinations they represent. The guide is being put together with the State Department's Diplomatic Culinary Partnership, which is an exciting collaboration with James Beard-recognized chefs and others.

Brand USA hosts USA Pavilions at BIT in Milan, Italy and AIME in Melbourne, Australia.

As part of its NFL partnership, Brand USA creates a video covering the weeklong Super Bowl experience from the vantage point of a tourist visiting New York City during Super Bowl week. Brand USA currently has seven partners in the sports and entertainment segment— ranging from major

broadcasters such as ESPN to major league sports such as football and baseball to entertainment providers such as Cirque du Soleil to filmmakers like MacGillivray Freeman Films (a major producer of giant screen format films). These partners in total contributed nearly \$35 million to the United States marketing effort in FY2013.

Brand USA launches the Great American Road Trip digital campaign, which features 10 road trips covering 39 states and countless destinations through July via Brand USA's Discover America digital channels. The campaign is designed to inspire travelers to discover America from the open road and highlights both the well-known and less-discovered road trips by topic and geography. The featured road trips and markets include:

- February: Cruise the Pacific Coast Highway (Japan)
- March: Texas BBQ Trail (South Korea)
- April: Hawaii & the Hana Highway (China)
- April: Route 66: Chicago to Los Angeles (Global)
- April: Great River Road (Australia)
- May: Craft Beer Trail (Germany)
- May: The Oregon Trail (UK)
- June: The New England Coast (Canada)
- June & July: Atlantic Coast (Mexico and Brazil)

As part of the social media campaign, Brand USA unveils a new Google Maps feature on its DiscoverAmerica platforms where travelers can explore these 10 road trips. Visitors can save and plan their own journeys, share their road trip experiences with others and access curated playlists inspired by iconic routes and road trips.





➤ **March 2014**

Brand USA hosts a road show to Nanjing (Jiangsu Province) and Hangzhou (Zhejiang Province). Participants include the major agents and media in Hangzhou and Nanjing and from key U.S. partners with offices in China.

Brand USA hosts USA Pavilions at ITB Berlin; Expoviajes in Costa Rica; and TUR in Gothenburg, Sweden. In addition, Brand USA attends MITT in Moscow, supporting Visit USA Russia at its pavilion.

The redesign of the consular area at the U.S. Embassy in London is completed. The new design provides for a more welcoming environment and includes a variety of information for waiting visa applicants on travel to, as well as destinations and experiences available, in the United States.

➤ **April 2014**

For the third year in a row, Brand USA is the premier sponsor of IPW, which is held in Chicago. During the event, Brand USA holds meetings with more than 500 international travel buyers and supplier partners and unveils more than 100 new programs and platforms. Brand USA also partners with Choose Chicago and Discover Illinois throughout the event to promote experiences at the state and local level for international travelers.

Brand USA announces that it has begun pre-production of a film for giant screen theaters. The film, which is being produced by MacGillivray Freeman Films and scheduled to be released in mid 2015, will honor the centennial of the National Park Service and its 401 national sites. Today there are more than 800 giant screen theaters in more than 57 countries throughout the world.

Andrew Evans, National Geographic Travel's Digital Nomad, embarks on five awe-inspiring road trips in partnership with Brand USA to showcase unique travel experiences on the American open road. The journey, which includes adventures to 23 destinations, is documented in real-time using various social media channels. Evans begins his journey in Chicago this month through May 10 traveling the famed Route 66. Four additional road trips the Digital Nomad will be documenting throughout the year are Rhythms of the South, the Northeast Corridor, Mountains and Prairies, and Western Trails.

Brand USA and CBS travel editor and producer Peter Greenberg announce a new series featuring U.S. destinations and the impact international tourism has on local economies and the nation. The first documentary in the series is revealed at IPW in Chicago and featured on Brand USA's digital channels.

Brand USA hosts the second annual USA Pavilion at WTM Latin America in Sao Paulo, Brazil.

➤ **May 2014**

The Brand USA consumer campaign begins running in Brazil, South Korea and Japan.

The Brand USA social campaign featuring destinations and experiences that explore "The Great Outdoors" begins running through July.

Brand USA hosts its first MegaFam from Germany in partnership with Lufthansa Airlines. Eight groups of ten agents each depart from Frankfurt to discover and explore the USA on eight different simultaneous itineraries that take them to the gateways and surrounding regions beyond the gateways, including New York, the Washington D.C. capital region, Miami, Chicago, Dallas, Denver, Los Angeles and Seattle.

Brand USA hosts its second annual MegaFam from the United Kingdom in partnership with British Airways and American Airlines. The tour includes seven itineraries covering 21 states and the District of Columbia, providing opportunities for the 100 participating travel agents to explore many experiences and destinations to, through, and beyond the gateways.

The USA Discovery online training platform for the travel trade launches in India.



Objectives Review

OBJECTIVE #1

Continue to drive positive awareness and perceptions of the United States as a travel destination in order to increase visitation to and spend in the United States.

- Support all states and territories with a mix of trade and consumer focused initiatives
- Time the launch of consumer and trade outreach to maximize the opportunities that exist during peak travel planning periods
- Encourage return visits by previous travelers who are already holding multi-year validity visas

Results:

During FY13, Brand USA successfully achieved this objective by generating:

- 1.14 million incremental visitors to the United States, who spent
- \$3.4 billion on travel and fare receipts with U.S. carriers, resulting in
- \$7.4 billion in total sales, which supported
- More than 53,000 new jobs
- Nearly \$1 billion in local, state and Federal tax receipts



The resulting marketing return on investment (ROI) was 47:1 (marketing expenses only) and total budget ROI (of which 10% was overhead) was 34:1.

The results were documented by Oxford Economics, the worldwide leader in economic impact studies, which is used by destinations worldwide. Brand USA's marketing impact was determined following a review of the eight markets where we had fully deployed a combination of consumer, co-op and trade marketing during FY2013: Australia, Brazil, Canada, Germany, Japan, South Korea, Mexico and the United Kingdom. The results were verified by a robust econometric analysis validated by consumer sentiment and market share analysis. In addition, the analyses fully considered external factors outside of Brand USA's marketing efforts such as macroeconomic conditions, direct marketing investments by others, policy changes such as visa waiver status of international markets, and other general market dynamics.

A key to achieving this objective was Brand USA's successful utilization of an effective marketing mix of consumer, co-op and trade initiatives during FY2013, and the establishment of partnerships with organizations from every state and the District of Columbia.

During FY2013, to ensure the foundational consumer campaign comprised of broadcast, print, out-of-home and digital marketing strategies was the most effective, we timed the campaign to run during peak travel planning times and organized a number of supporting trade outreach, campaigns and activities accordingly.

In addition, to encourage return visits by previous travelers who are already holding multi-year validity visas, Brand USA refined its marketing approach in accordance with the positioning defined in its FY2014 business plan with messaging most relevant to each market. For example, in those markets where travel to the United States is less aspirational and more attainable—namely, established markets where a high proportion of visitors are repeat visitors—the Brand USA marketing message shifted to be less about inspiring travel to the United States and more about promoting specific experiences. This approach is more relevant to the audience and is more likely to encourage repeat visitation to new destinations within the United States.

OBJECTIVE #2:

Focus FY14 campaign activity on the following objectives:

- Achieve campaign awareness levels of +15% in consumer media target markets as measured by pre- and post-wave campaign research
- Improve the image and perceptions of the United States as a destination by statistically relevant increases (+3 points or more) as measured by pre- and post-wave campaign research
- Increase intent to travel to the United States as measured by pre- and post-wave campaign research with target increases of 5%

Results:

Brand USA surpassed this objective as follows:

- Target campaign awareness of 15% was exceeded in each market in which the "Land of Dreams" campaign ran—ranging from 20% in Brazil to 61% in Canada
- Results across markets vary, but pre- and post-wave results often show 3%+ increases in positive perceptions including: forward-thinking, trendy, open-minded and diverse
- Campaign recognizers in most markets were significantly more likely than non-recognizers to indicate they are "highly likely" to visit the US in the next 12 months, the strongest results reaching +17% in both Canada and Japan.

The results were evaluated by the use of ad tracking studies conducted in Brazil, Canada, Japan, Mexico and the United Kingdom. These studies were conducted by Hall & Partners (Canada, UK, Japan pre- and post-wave), GMI (Brazil and Mexico pre-wave), and Ipsos (Brazil and Mexico post-wave).

Although pre- and post-wave studies were not conducted in Australia, Germany or South Korea during FY2013, the incremental visitation and spend generated according to the Oxford Economic study demonstrates that Brand USA's efforts to increase awareness and enhance the image of the United States as a travel destination among travelers in these markets continues to be at targeted levels.

OBJECTIVE #3

Activate the consumer campaign in international markets that generate more than 78% of inbound travel to the United States.

Results:

Brand USA also achieved this objective by activating the consumer campaign in the following international markets during calendar year 2013:

- Australia (September 2013)
- Brazil (June-July and November-December 2013)
- Canada (February to April and June 2013)
- China (October to December 2013)
- Germany (December 2013 to March 2014)
- Japan (March to April 2013)
- South Korea (October to November 2013)
- Mexico (June to July 2013)
- Hong Kong and Taiwan (October to November 2013)
- United Kingdom (January to March 2013 and September to October 2013)

During the above campaign runs, Brand USA utilized varying degrees of television, out-of-home, digital and print marketing tactics most appropriate for each market.



OBJECTIVE #4

Roll out a fully integrated metrics plan to measure performance of all marketing activities.

Results:

Brand USA achieved this objective in FY2013 by developing and launching a fully integrated metrics plan designed to track success across the target travel cycle phase as travelers move along the continuum of “Dream-Consider-Activate-Travel and Share.” Comprised of a combination of performance tracking and market intelligence gathering research, the results are enabling Brand USA to focus its marketing activity around the relevant stages of the travel life cycle by market. For example, efforts in established markets such as Canada and the United Kingdom focus on facilitating and creating strong booking calls to action, while the approach in emerging markets focuses on inspiring travel to the United States.

Research Type	Marketing Objective	Metrics Category	Metric	Methodology	Source(s)	Reporting Frequency
Intelligence	Marketing Strategy	Market Intelligence	Traveler behaviors, Preferences and perceptions	Online survey, 1,500 completes per campaign/test market	PhoCusWright	Annual
			Market share of outbound tourism from target markets, total and by channel	Actuals as reported by global government organizations and tourism boards, reservation distribution systems	UNWTO plus others TBD	Annual (plus subset potentially monthly)
			Competitor advertising monitoring	Actual values	Media vendors	Annual
	Advertising Development	Creative Testing	Traveler reaction to ad creative	Online survey, 1,500 completes per campaign/test market	Ipsos	Semi-Annual
Performance	Advertising Efficiency	Marketing Mix Optimization	Geographic distribution of ad units and cost	Actual values	Brand USA internal data plus media vendors	Monthly
			Media channel distribution of ad units and cost	Actual values	Brand USA internal data plus media vendors	Monthly
	Advertising Effectiveness	Awareness	Total brand media Impressions	Actual values	Brand USA internal data plus media vendors	Monthly
			Consumer destination familiarity	Online survey, 1,500 completes per campaign market	Ipsos	Semi-Annual
		Engagement	Clicks on digital ads	Actual values	Brand USA internal data plus media vendors	Monthly
			Website visitation	Actual values	Brand USA internal data	Monthly
		Consideration & Action	Search volume	Actual values	Data partner and general search engines	Monthly
			Consumer intent to visit	Online survey, 1500 completes per campaign market	Ipsos	Semi-Annual
	Purchase	Total inbound visitation and expenditure by source market	Paper survey sampling 0.2% of all international passengers	OTTI Dept. of Commerce	Annual	
		Attributable increase in visitation and expenditure	Calculated as the delta between forecasted visitation and spend based on historical performance (including confounding factors) and actuals reported by OTTI	Oxford Economics	Annual	
		Attributable increase in economic impact	Calculated based on attributable visitation and expenditure metrics	Oxford Economics	Annual	
	Sharing	Consumer net promoter score	Online survey, 1,500 completes per campaign market	Ipsos	Semi-Annual	
		Consumer sentiment index	Volume and semantic analysis of consumer generated content on social networks and travel websites	TBD RFP to be issued	Monthly	



OBJECTIVE #5

Create and add value for partners by developing and executing programs and campaigns that support the objectives of the Travel Promotion Act and the National Travel and Tourism Strategy.

Results:

In addition to expanding its consumer, co-op and trade marketing initiatives to support the objectives of the National Travel and Tourism Strategy, Brand USA achieved this objective in FY2013 by collaborating with the Department of Commerce Tourism Policy Council. Initiatives included:

- Developing a program with the Tourism Policy Council Marketing and Promotion Working Group to showcase the culinary travel experiences in the United States. The culinary initiative is a collaboration primarily with the Department of State, with the Departments of Agriculture and Commerce playing supportive roles, that invites the world to discover our land through the lens of food stories. The centerpiece of the culinary initiative is a culinary guide that features inspiring information about different regions of the country and recipes from 31 renowned American chefs from the State Department's Diplomatic Culinary Partnership. The guide will be launched at embassy July 4 celebrations, and chefs will travel to several markets to engage in promotional and public diplomacy efforts. A robust digital platform ties the print guide and all promotional activities together in a united call-to-action.
- Beginning work with the Departments of Interior, Agriculture, Commerce and the Army Corps of Engineers to promote America's national treasures through two main channels:
 - » A digital/social focus on the great outdoors
 - » A giant screen feature film to be released in time for the Centennial of the National Park Service
- Collaborating with the Foreign Commercial Service and the State Department to equip diplomatic personnel with high-quality marketing materials for embassy facilities and promotional events, including video, poster and banner files.

- Initiating in FY2013 a redesign of the consular area at U.S. Embassy London to make it a more welcoming environment and distribution information to waiting visa applicants on travel experiences in the United States. The redesign was completed in FY2014. Brand USA continues to work with the U.S. Foreign Commercial Service and State Department personnel on a wide variety of other in-market activities around the world, including trade shows, industry roundtables, trade and sales missions, PR events and other promotional opportunities in markets where Brand USA does not have a presence. These events promote travel to the United States and communicate visa and entry policy and changes to those policies such as ESTA familiarization in places like Taiwan and Chile that recently joined the Visa Waiver Program.
- Developing a travel policy communications matrix with the Tourism Policy Council Ease of Travel Working Group to communicate U.S. visa and entry policy. This matrix and accompanying messaging points are being used to plan and communicate coherent messaging to international consumers and the travel trade about applying for visas, the Visa Waiver Program, entering the country and the Department of Homeland Security's trusted traveler programs. Key Brand USA communication channels include DiscoverAmerica.com, our online and print inspiration visitor guides, trade show exhibitor briefing booklets and via outreach to international travel media. This messaging enabled Brand USA to correct misperceptions about the entry process during periods of increased media interest such as around sequestration and the government shutdown.
- Providing platforms for officials from the Departments of State and Homeland Security to deliver travel policy information directly to the international travel industry, including at the 2013 World Baseball Classic games played Phoenix and Taiwan, the Brand USA MegaFam finale in Austin (May 2014), IPW and other industry conferences.
- Providing a platform for the Department of Homeland Security to drive enrollments in Global Entry and other trusted traveler programs, including at IPW and during special events sponsored by Brand USA such as the World Baseball Classic.



OBJECTIVE #6

Expand global representation firms to have a presence in markets that generate 90% of inbound travel to the United States; align international firms to complement and augment marketing strategy and campaign market launches.

Results:

Brand USA successfully achieved this objective in FY2013 by expanding its travel trade outreach (international representation and/or trade outreach) to 20 markets during the year. These markets include Australia, Austria, Brazil, Canada, Central America, China, France, Germany, Hong Kong, India, Ireland, Italy, Japan, South Korea, Mexico, New Zealand, Russia, Switzerland, Taiwan, United Arab Emirates, and the United Kingdom. In total, these markets generate 90% of all inbound travel to the United States.



Of these markets, Brand USA currently has international representation established that cover the following markets: Australia, Austria, Brazil, Canada, Central America, Germany, Hong Kong, India, Ireland, Japan, South Korea, Mexico, New Zealand, Switzerland, Taiwan, United Arab Emirates, United Kingdom.

Although we had targeted to also open offices to represent the United States' tourism marketing interests in the Benelux, Russia, and Scandinavia we decided to postpone expansion to these markets due to changing market conditions.

Brand USA offices for Mexico, Central America, and Brazil were selected in FY2013 and ultimately opened during October and November 2013.

OBJECTIVE #7

Align and unify the industry's international marketing efforts through tradeshows, sales missions, workshops/seminars and other travel trade outreach and consumer marketing programs.

Results:

Brand USA achieved this objective by establishing a strong combination of travel trade outreach activities that included 24 international trade shows, as well as a variety of sales missions, road shows and themed events to increase awareness and enhance the image of the United States among the international travel trade (tour operators, travel agents and international travel media). Other initiatives included training programs (online and onsite), MegaFams (familiarization tours) and collaboration with Visit USA committees and others via advisory boards and special event sponsorships.

Exhibitor presence at Brand USA hosted pavilions at international trade shows increased in line with targeted percentages wherever expansion opportunities were available, with Brand USA making its debut at key international travel shows in Brazil and Russia.

During the year, we also created a comprehensive exhibitor guide to help exhibitors maximize the USA's presence at all international shows where we hosted a USA pavilion. To further support USA exhibitor's interests at these shows, we also hosted a variety of networking events at each show and provided exhibitors with market information guides that feature Brand USA proprietary research about travel trends and traveler preferences from the respective markets.

During the year, Brand USA also expanded its travel trade training programs, including the launch of its first online travel trade online training platform. The platform launched in the United Kingdom in June 2013 and is slated for expansion to other markets during FY2014.



OBJECTIVE #8

Build engagement, trust and advocacy for Brand USA through strategic communications and industry relations.

Results:

This objective was met through our various trade outreach activities—comprised of trade shows, sales mission, road shows, training initiatives, familiarization tours and advisory boards.

Domestically, we continued to build engagement, trust and advocacy for Brand USA through regular industry communications via a monthly newsletter, our annual report and our annual business plan published on our website, as well as through participation in key destination and travel industry conferences and events.

Our Federal partner collaboration was and continues to be accomplished through regular meetings with the Tourism Policy Council Marketing and Promotion Working Group and the Ease of Travel Working Group. In addition, we are engaged on an ongoing basis with the Research Working Group and by providing regular briefings at Tourism Policy Council principals meetings and to Federal partners across nine agencies. These meetings allowed us to provide updates on market expansion and campaign successes.

To keep our partners up to date on program opportunities and activities, we also published online and in print a comprehensive partnership guide and held a number of partner immersion and strategy sessions to make sure we are maximizing co-operative marketing initiatives to promote international travel to the United States.

To further enhance our relationships with industry partners and promote experiences and destinations in the United States, we launched a national media site allowing participants to promote destinations, attractions and experiences across the United States. This platform amplifies the individual efforts of our partners and provides a central location for the international travel and consumer media to access travel-related news about the United States in one location.

OBJECTIVE #9

Collaborate with the Federal government on communication of visa and entry policy and implementation of the National Travel and Tourism Strategy.

Results:

Brand USA met this objective in FY2013 by continuing to play an instrumental role in the execution of the National Travel and Tourism Strategy, especially in marketing and promotion and communicating the ease of travel to the United States.

During the year, Brand USA management met regularly with the Tourism Policy Council at the staff, working group leadership and principal levels—meeting more than 15 times with the Tourism Policy Council, including 13 meetings at the working group staff level and two at the CEO-Principal level. These meetings ensure a coordinated approach to collectively pursuing the goals of the National Travel and Tourism Strategy and coherent inter- and intra-agency collaboration with Brand USA.

Initiatives included:

- Laying the foundation for strategic marketing collaboration with the Tourism Policy Council—including thematic promotions like culinary and great outdoors and geographic focuses in key markets.

- Developing a program with the Tourism Policy Council Marketing and Promotion Working Group to showcase the culinary travel experiences in the United States. The culinary initiative is a collaboration primarily with the Department of State, with Agriculture and Commerce playing supportive roles, that invites the world to discover our land through the lens of food stories. (See objective 5 above)
- Beginning work with the Departments of Interior, Agriculture, Commerce and the Army Corps of Engineers to promote America's national treasures through two main channels:
 - » A digital/social focus on the great outdoors
 - » A giant screen feature film to be released in time for the Centennial of the National Park Service
- Collaborating with the Foreign Commercial Service and the State Department to equip diplomatic personnel with high-quality marketing materials for embassy facilities and promotional events, including video, poster and banner files.
- Working with the U.S. Embassy London to redesign of the consular area in order to make it a more welcoming environment and distribution information to waiting visa applicants on travel experiences in the United States. (See objective 5 above) In addition, Brand USA continues to work with U.S. Foreign Commercial Service and State Department personnel on a wide variety of in-market activities around the world including trade shows, industry roundtables, trade and sales missions, PR events and other promotional opportunities in markets where Brand USA does not have a presence. These events promote travel to the United States and communicate visa and entry policy and changes to those policies such as ESTA familiarization in places like Taiwan and Chile that recently joined the Visa Waiver Program.
- Began coordinating the Federal Row presence at IPW, which was executed in FY2014, to present a united front to the travel industry.
- Collaborating with Brand USA's Federal partners on a series of meetings around IPW designed to communicate visa and entry policy to the international travel trade. These meetings included briefings of the worldwide Visit USA network, the Japanese Association of Travel Agents and more.
- Working with the Department of Homeland Security/Customs and Border Protection and airport authorities to understand and improve the customer experience at our ports of entry. To this end, Brand USA engaged in productive dialogue with the Department of Homeland Security/Customs and Border Protection throughout FY2013 regarding the customer experience at ports of entry. Brand USA continues to convey that entering the United States is straightforward and communicate information that would support continued expansion of the Department of Homeland Security trusted traveler programs and other visa streamlining initiatives. Among other things, Brand USA provides a platform for Customs and Border Protection to communicate and expand the Global Entry process, which lessens wait times for Global Entry members and non-Global Entry members, and improves the experience at ports of entry. Our dialogue with the Department of Homeland Security continue into FY2014 and beyond around how to best ensure a welcoming environment.

In addition, as noted in objective 5, during the year, we developed a travel policy communications matrix with the Tourism Policy Council Ease of Travel Working Group to communicate U.S. visa and entry policy. Establishment of metrics around communication of entry policy, including leveraging existing data sources like Brand USA advertising effectiveness research, Customs and Border Protection customer satisfaction survey, and more, is a stated objective of this collaboration. Dialogue continues on the establishment of metrics.



OBJECTIVE #10

Generate a combination of cash and in-kind contributions from the private sector to generate \$100 million and thereby maximize the 1:1 match.

- Target 50% from cash contributions and 50% from in-kind contributions, but no less than 20% cash and no more than 80% in-kind.

Results:

Brand USA achieved this objective during FY2013, with partners contributing 73% in-kind and 27% in cash. In addition, we nearly doubled the number of cash contributors from 41 to 81 and cash contributions from \$28.2 million to \$32.2 million compared to FY2012. Notably, the average cash contribution from returning partners with letters of agreement increased 17% from \$639,000 per partner to \$748,000 per partner.



In-Kind Contributions

FY2013 In-Kind Contributions

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Austin CVB	Contributed accommodations, meals and other services to support Brand USA MegaFam from the United Kingdom	\$15,305
ABAV: Exhibiting Contributors	Brand USA pavilion at the ABAV Trade Show in Brazil 2012. Contributions from the following exhibitors at the USA Pavilion at ABAV, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Academy Bus, AlliedTPro, AT Representacoes, Visit Anchorage, Choose Chicago, Denihan Hospitality Group, Dollar Rent A Car, Embrace Enterprises, Visit Florida, Global Hospitality Marketing Link, Harlem Spirituals/New York Visions, ITMS, Las Vegas CVA, Leading International Business Corp., Marriott International, New Orleans Convention & Visitors Bureau, Ole Tours Hawaii, On Spot, Visit Orlando, Personal RGE Tours	\$119,762
Air Berlin	Air Berlin donated logo inclusions, an in-flight entertainment spots and other media assets	\$665,623
American Express International Taiwan, Inc.	Provided Brand USA tourism marketing insert piece as part of a direct mail campaign	\$127,646
Andar de Viaje	Contributed print advertising space in international markets	\$13,200
Arizona Office of Tourism	Contributed international market research to inform and optimize Brand USA's promotional activities	\$185,460
Asheville CVB	Contributed international market research to inform and optimize Brand USA's promotional activities	\$13,038
Asiana Airlines	Contributed out-of-home print and multi-media advertising space via Asiana Airlines in-flight magazine and TRIAD in-flight broadcasting system	\$238,921
ATM: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at ATM, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Visit California, Dallas/Ft. Worth International Airport, Visit Florida, Intercontinental Hotel Los Angeles at Beverly Hills, TeamAmerica Receptive Tour Operator	\$40,610

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Baxter Travel Media	Contributed print advertising space in international markets	\$109,080
BIT: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at BIT, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Hertz, Hyatt Hotels & Resorts, I Viaggi del Toghiro, Olympia Viaggi to Spa, Press Tours, TeamAmerica Receptive Tour Operator, The Park Central Hotel, Universal Orlando Resort, USA Bound, Visit USA Association Italy, Wyndham Hotel Group	\$39,364
BS Fuji	Contributed print advertising space in Japan	\$599,004
Cirque du Soleil	Contributed show tickets as part of promotional event targeting the travel trade at international trade show	\$217,599
CITM: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at CITM, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Visit Alaska, All Americas Inc., America International Travel Services, America Asia Travel Center, American United International Group, Avis Budget Group, Visit California, Choose Chicago, Delta Air Lines, Dollar Thrifty Automotive Group, East West Marketing Corp., Visit Florida, Guam Visitors Bureau, Happy Vacations, Hawaii Tourism China, Hertz, Las Vegas CVA, Marianas Visitors Authority, NTA, NYC & Company, Premium Outlets/Simon, Shun Travel and Business Inc., Travel Oregon, Travel Portland, UCC, U.S. Space & Rocket Center, Utah Office of Tourism, Visit USA China	\$246,581
Cleverdis	Contributed broadcast and print advertising space in ITB News trade show publication	\$120,839
Destination Marketing Association International (DMAI)	Contributed sponsorship and related membership benefits to reach international travel trade	\$67,774
Destination Marketing Organizations and Convention & Visitors Bureaus (contributions of digital assets)	Photography, video and film contributed to Brand USA with associated licensing and associated rights for use in advertising, marketing, and other promotional efforts to support Brand USA's mission (see <i>itemized list of contributors on page 52</i>)	\$10,575,617

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Discover New England	Contributed accommodations, meals and other services to support familiarization tours	\$27,001
Diversity Tourism UG	Contributed print advertising space in international markets	\$13,845
Destination Marketing Organizations, Convention & Visitors Bureaus and Private-Sector Organizations (contributions of marketing and advertising)	Broadcast, print, digital, out-of-home, multi-media and other advertising space and marketing exposure to support Brand USA's promotional efforts to reach international travel trade and international consumers <i>(see itemized list of contributors on page 56)</i>	\$5,534,567
Enfoque del Café	Contributed print advertising space to reach international markets	\$136,320
Expedia	Contributed digital advertising on international sites plus custom research to inform and optimize Brand USA's promotional activities	\$2,863,705
FITUR: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at FITUR, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: 5A Incentive Planners, Action Travel, Adventure Travel West Inc., AmercanTours International, Aviamark/American Receptive Operator, Best Western, Dollar Thrifty Automotive Group, Don Quijote Tours Boston, EagleRider Motorcycle Rentals and Tours, Gansevoort Hotel Group, Go West Tours, Hard Rock Café, Hertz-Interplanet GSA, Juventud y Cultura, Las Vegas CVA, Mena Tours & Travel Inc., Munditickets Inc., NYC & Company, Visit Orlando, Petty International Tours, Visit St. Petersburg/Clearwater, Travalco, Unica Tours USA Inc., Vacations USA Tours, Visit USA Committee Spain	\$133,634
General Growth Services, Inc.	Contributed print advertising space to reach international markets	\$34,290
Georgia Dept. of Economic Development	Contributed marketing research to inform and optimize Brand USA's promotional activities	\$47,522
The Guardian	Contributed print,online, mobile and tablet advertising	\$3,047,487

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Hayes and Jarvis	Contributed print, digital and direct mail advertising to reach the international travel trade	\$25,920
Hilton	Contributed marketing research to inform and optimize Brand USA's promotional activities	\$987,293
House and Garden	Contributed print advertising in a special supplement of House and Garden international magazine	\$33,231
IFTM Top Resa: Exhibiting Contributors	Contributions from the following exhibitors at the USA Pavilion at IFTM Top Resa, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Arizona V-Twin Dreams, Best Western, Bonjour USA, Visit California, FAB Travel TourCom, Florida Keys and Key West, Florida Travel & Co LL, Go West - ECS Euro Conseil Service, Great American Tours, Greater Ft. Lauderdale CVB, Greater Miami Convention & Visitors Bureau, Harlem Spirituals, Las Vegas CVA, Explore Minnesota Toursim, Niagara Tourism & Convention Bureau, Noble Kommunikation Gmbh-Seaworld, NYC & Company, Revamerica Tours,, TeamAmerica Inc., Terres Indiennes-Indian Land Inc., Tourico Holidays, Travalco, Universal Studios Hollywood, Visit USA France	\$122,048
International Media Organizations (IMO)	International Media Organization donated the following ads in various World Trade Market publications: WTM catalogue, WTM Business, WTM Route Planner, WTM Review	\$120,629



CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
ITB: Exhibiting Contributors	Contributions from the following exhibitors at the USA Pavilion at ITB, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Academy Ground Transportation, Accommodations Plus Receptive Tours, Admiral Tours Plus, LLC, AIANTA, Alabama Tourism Department, Travel Alaska, AlliedTPro, America's Tent Lodges, American Cruise Lines, American Indian Alaska Native Tourism Association, American Pursuits, American Ring Travel Inc., AmericanTours International, LLC, Amtrak USA Passenger Rail, Best Western Worldwide Reservations, Inc., BWI Airport, Visit California, Camping World Leasing LLC, Choose Chicago, City Tours Maine, CitySights NY/Go Airlink Shuttle, Colorado Tourism Office, Continental Airlines, Cruise America, Desires Hotels, Discover New England, eHotelpass c/o Skytours Online, El Monte RV, Excursionist USA Incoming, Visit Florida, FOX Rent A Car, Gastaldi USA, Georgia Department of Economic Development, Go West Tours, Gray Line NY Sightseeing, Great Lakes USA, HAT Marketing, Hawaii Tourism Europe, Holiday Inn Hasbrook Heights NJ, Interconnect USA, Kansas & Oklahoma Travel & Tourism, Las Vegas CVA, Luxe Worldwide Hotels, Texas Tourism, Marriott Hotels of Florida, Mauiva, Memphis, Mississippi, Mistral Cruises, Moturis (Camping World), New World Travel, North Dakota Tourism Division, NYC & Company, Ocean Five Hotel, Premium Outlets Simon, Rocky Mountain International, Scottsdale CVB, Sonesta Collection, South Carolina Dept. of Parks, Recreation & Tourism, Sun Islands Hawaii, Tennessee Department of Tourist Development, The Best Destinations of the West, The Luxe, Tourico Holidays, Travalco, Travel Oregon, U.S. Attractions Collection, U.S. Travel Association, United Airlines, United Tours of America, Utah Office of Tourism, Vacations by Rail, Weichmann, Westgate Resorts, Yakima Valley Visitors & Convention Bureau	\$1,377,881
Kuoni Reisen AG	Contributed print, digital, and out-of-home advertising and other promotional materials	\$33,500
Las Vegas CVA	Las Vegas CVA donated logo placement for city map distribution in China, print costs for 5000 pieces of Korean brochures/maps, spanish brochure of the city, and video production costs	\$17,196

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Las Vegas CVA	Contributed various marketing research studies to inform and optimize Brand USA's promotional activities	\$1,279,614
Let's Travel Magazine	Contributed print advertising space to reach international markets	\$74,435
LimeTree Media	Contributed print and online advertising space to reach international markets	\$87,500
Macgillivray Freeman Films	A non-exclusive license to use up to 250 minutes from six MacGillivray Freeman Productions featuring USA destinations and experiences (The Living Sea, Grand Canyon Adventure, The Discoverers, Journey into Amazing Caves, Speed, and Hurricane on the Bayou), including select outtakes and B-roll. Giant-screen formatted footage may be used in a variety of Brand USA productions to be determined such as short films, commercials, and digital videos. Contribution is inclusive of licensing and usage rights throughout the world	\$30,641,409
Marriot International	Contributed marketing research studies to inform and optimize Brand USA's promotional activities	\$328,320
Greater Miami Convention & Visitors Bureau	Contributed marketing research to inform and optimize Brand USA's promotional activities	\$79,869
Missouri Division of Tourism, Department of Economic Development	Contributed various marketing research studies to inform and optimize Brand USA's promotional activities	\$61,058
Mundo Turistico	Contributed print advertising space to reach international markets	\$5,000
National Football League	Contributed sponsorship and related benefits to reach targeted international audiences	\$853,180
National Geographic	National Geographic donated advertising space, custom surveys, new content creation, NSG maps and custom photo exhibit	\$1,426,420
North America Travel	Contributed print and online advertising space to reach international markets	\$5,600

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Novak Birch, Inc.	Contributed event support materials, art production and related graphic design services	\$32,904
Orbitz Worldwide	Contributed digital advertising on international sites, plus digital platform app development	\$3,094,304
Outdoor Revolution Ltd.	Contributed multi-media advertising space	\$20,000
PhoCusWright, Inc.	Contributed marketing research to inform and optimize Brand USA's promotional activities, plus event sponsorship and related benefits	\$304,822
PM Publishing Solutions	Contributed print advertising in various trade show related marketing materials to reach international travel trade	\$82,560
Preferred Hotels	Contributed elite hotel memberships and print advertising to reach international travelers	\$725,000
Qantas Airways	Contributed digital, broadcast, in-flight/out-of-home, multi-media advertising space to reach international travelers plus airline tickets to support Brand USA MegaFam and other promotional efforts	\$344,629
Qatar Airways	Contributed airline tickets to support Brand USA familiarization tours and other promotional efforts Qatar Airways donated airline tickets to be used in the marketing and promotional efforts	\$100,744
Reader's Digest	Contributed print and broadcast advertising in Taiwan and Hong Kong to support marketing and promotional efforts	\$418,734
ROAD ABC Media	Contributed print advertising to support marketing and promotional efforts targeting international travelers	\$132,090
SATTE: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at SATTE, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: 7M Tours, Avis Budget Group, Visit California, Visit Florida, Las Vegas CVA, SeaWorld Parks & Entertainment, TeamAmerica Receptive Tour Operator, USA Grand Tours	\$32,186

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
Screen Actors Guild/ Talent Partners	Contributed talent fees for broadcast and digital advertising	\$656,246
SeaWorld Parks & Entertainment	Contributed marketing research to inform and optimize Brand USA's promotional activities plus tickets to support familiarization tours and incentivize international travel trade	\$64,072
Societa Geografica Italiana	Contributed print advertising and international travel trade show/booth sponsorship and related promotional activities	\$134,441
STA Travel	Contributed print and digital advertising in various marketing channels to reach international travelers	\$5,872,839
Thomas Cook Group	Contributed print and digital advertising in various marketing channels to reach international travelers	\$11,209,852
Tour Magazine	Contributed print advertising to reach international travelers in target markets	\$5,428
Travel Weekly	Contributed print advertising to reach international travelers in target markets	\$95,584
Travelocity	Contributed digital advertising on international sites	\$72,259
TravMedia	Contributed annual subscriptions of TravMedia's proprietary online network platforms to reach international media and travel trade	\$123,750
Trip Advisor	Contributed digital advertising on international sites	\$3,406,411
TTG: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at TTG, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Alamo Rent A Car, AlliedTPro, American Tours International LLC, Best Western, Discover New England, EagleRider, Florida Keys and Key West, Go West Tours, Greater Miami Convention & Visitors Bureau, IlTempo Ritrovato Tour Operator, Las Vegas CVA, Olé Tours Hawaii, Press Tours, Rocky Mountain International, TeamAmerica, Travalco, U.S. Virgin Islands, USA Bound Travel Holdings Inc., Visit USA Association Italy	\$114,018
TTG Media Limited	Contributed print and digital advertising and other promotional materials in targeted international markets in Asia and the United Kingdom	\$1,153,894

CONTRIBUTOR	DESCRIPTION	FAIR MARKET VALUE
TUR: Contributing Exhibitors	Contributions from the following exhibitors at the USA Pavilion at TUR, who provided Brand USA media and promotional exposure through public relations activities, booth activation, and other services: Alamo, American Tours International LLC, Colorado Tourism, Continental Airlines, Discover America Sweden, EagleRider, El Monte RV, Florida's Beaches, Get It Across Marketing, Go West, New Orleans, New Yorker Travel, NYC & Company, OMIS Travel Representation AB, Sarasota, Bradenton International Airport, South Texas Nature Marketing, Swanson's Travel, Washington Square Hotel	\$57,144
Turner Japan	Contributed broadcast advertising space in Japan	\$240,655
United Airlines	Contributed media and promotional exposure through public relations activities, booth activation, and other services at the Hana Tour International Travel Show, plus airline tickets to support travel trade activities and marketing campaigns in Hong Kong, China, and Taiwan	\$1,336,342
Buffalo Niagara Convention & Visitors Bureau	Contributed various marketing research studies to inform and optimize Brand USA's promotional activities from Canada to the USA	\$140,155
Visit California	Contributed accommodations, meals and other services to support Brand USA MegaFam from the United Kingdom	\$17,584
Visit Denver	Contributed accommodations, meals and other services to support Brand USA MegaFam from the United Kingdom	\$5,555
Visit Orlando	Contributed various marketing research studies to inform and optimize Brand USA's promotional activities	\$238,172
Visit USA-Spain	Contributed print,online, mobile and tablet advertising	\$41,488
WAYN (Where Are You Now)	Contributed digital advertising, digital direct marketing and online services to reach international travelers in target markets, plus marketing research to inform and optimize Brand USA's promotional activities	\$251,520
TOTAL FY2013 IN-KIND CONTRIBUTIONS		\$93,319,279

Contributions of Digital Assets

CONTRIBUTOR	VALUE
Visit Anchorage	\$18,434
Arkansas Department Parks and Tourism	\$306
Visit Bowling Green	\$3,892
Charleston Area Convention & Visitors Bureau	\$2,434
Destination DC	\$765
Dupage CVB	\$14,462
Durango Area Tourism Office	\$20,038
Visit Finger Lakes Connection, Ontario County NY	\$12,941
Fredericksburg Area Tourism	\$6,819
Gettysburg CVB	\$5,317
Grand Canyon Railway, LLC	\$8,481
Great Rivers County Regional Tourism Development	\$11,715
Guam Visitors Bureau	\$14,505
Harrisonburg Tourism	\$16,666
Visit Indy	\$3,825
Jackson Hole Mountain Resort	\$12,228
Visit Jacksonville	\$4,774
Jekyll Island Authority	\$914
Kiawah Island Golf Resort	\$22,333
Visit Lake Charles/southwest Louisiana CVB	\$21,869
The Martin County CVB	\$409
Massachusetts Office of Travel and Tourism	\$19,579
Greater Miami Convention & Visitors Bureau	\$258,624
Travel Michigan	\$306
Missouri Division of Tourism	\$224,271
Montana Office of Tourism	\$457
Visit Napa Valley	\$3,272
Nashville Convention & Visitors Bureau	\$23,076

CONTRIBUTOR	VALUE
New Hampshire Division of Travel & Tourism	\$306
Visit New Haven	\$7,014
Discover Palm Beach County	\$15,573
Palm Coast and Flager Beaches	\$2,045
Greater Palm Springs CVB	\$7,222
Greater Phoenix Convention & Visitors Bureau	\$2,434
Pocono Mountains Visitors Bureau	\$10,946
The City of Pontiac, Illinois	\$5,282
Positively Cleveland	\$3,618
Prince William County & Manassas Convention and Visitors Bureau	\$25,144
San Juan Islands Visitors Bureau	\$8,989
SeaWorld Parks & Entertainment, Inc.	\$54,606
Sonoma County	\$3,179
South Dakota Department of Tourism	\$306
Syracuse CVB	\$7,610
Utah Office of Tourism	\$1,224
White Pass Scenic Byway - WA	\$2,853
Visit Akron-Summit CVB	\$7,546
Experience Arlington, Texas	\$14,277
Asheville, CVB	\$4,836
Branson Lakes Area, MO	\$10,100
Cape Cod Chamber of Commerce	\$20,678
Cincinnati USA Regional Tourism Network	\$6,543
CityPASS Inc	\$6,900
Colorado Springs CVB	\$1,796
Experience Columbus	\$9,940
Fairbanks CVB	\$9,458
Fingerlakes Visitors Connection	\$10,203
Great Rivers Country	\$13,832

CONTRIBUTOR	VALUE
Idaho Tourism	\$5,726
Lake Charles CVB	\$1,675
Lake Havasu CVB	\$4,136
Lee County VCB	\$9,019
Little Rock CVB	\$16,650
Los Angeles CVB	\$102,421
Macon Bibb County, CVB	\$2,571
Visit Mendocino County	\$1,220
Greater Miami Convention & Visitors Bureau	\$14,666
New Hampshire Department of Resources and Economic Development	\$66,660
New Mexico Tourism Department	\$511,207
Visit Newport Beach Inc.	\$912
Oneida County Tourism	\$32,952
Philadelphia (GPTMC)	\$55,986
Greater Pittsburgh CVB (Visit Pittsburgh)	\$4,406
Redding Convention CVB	\$10,536
Rockford Area CVB	\$8,207
San Diego CVB	\$30,411
San Francisco Travel Association	\$52,197
Santa Monica CVB	\$20,041
Florida Space Coast Office of Tourism	\$3,757
Virginia Beach CVB	\$2,097
Warren County, CVB	\$300
White Mountains Attractions Association (New Hampshire)	\$14,907
Williams -Grand Canyon Chamber of Commerce	\$4,029
Yosemite Sierra Visitors Bureau	\$1,629
The Alabama Tourism Department	\$16,022

CONTRIBUTOR	VALUE
State of Alaska DCCED	\$5,929
Arkansas Parks & Tourism	\$13,766
Austin CVB	\$1,967
Chicago Office of Tourism & Culture	\$8,490
Colorado Tourism Office	\$11,508
Visit Dallas	\$2,390
Delaware Tourism Office	\$2,895
Visit Denver	\$2,869
Detroit Metro CVB	\$18,197
Visit Florida	\$22,078
Georgia Department of Economic Development	\$4,381
Guam Visitors Bureau	\$3,517
Hawaii Tourism Authority	\$12,492
Greater Houston CVB	\$3,028
Indiana Office of Tourism	\$1,222
Iowa Tourism Office	\$10,674
Kansas Department of Wildlife, Parks & Tourism	\$10,155
Kansas City Convention & Visitors Association	\$1,071
Kentucky Department of Travel & Tourism	\$37,586
Las Vegas Convention & Visitors Authority	\$11,222
Louisiana Office of Tourism	\$3,342
Maine Office of Tourism	\$9,639
Maryland Office of Tourism	\$26,966
Mauui VCB	\$4,703
Travel Michigan	\$7,497
Explore Minnesota Tourism	\$4,284
Missouri Division of Tourism	\$2,448
Montana Office of Tourism	\$10,582
Myrtle Beach Area Chamber of Commerce/CVB	\$2,907

CONTRIBUTOR	VALUE
Idaho Tourism	\$5,726
Lake Charles CVB	\$1,675
Lake Havasu CVB	\$4,136
Lee County VCB	\$9,019
Little Rock CVB	\$16,650
Los Angeles CVB	\$102,421
Macon Bibb County, CVB	\$2,571
Visit Mendocino County	\$1,220
Greater Miami Convention & Visitors Bureau	\$14,666
New Hampshire Department of Resources and Economic Development	\$66,660
New Mexico Tourism Department	\$511,207
Visit Newport Beach Inc.	\$912
Oneida County Tourism	\$32,952
Philadelphia (GPTMC)	\$55,986
Greater Pittsburgh CVB (Visit Pittsburgh)	\$4,406
ReddingConvention CVB	\$10,536
Rockford Area CVB	\$8,207
San Diego CVB	\$30,411
San Francisco Travel Association	\$52,197
Santa Monica CVB	\$20,041
Florida Space Coast Office of Tourism	\$3,757
Virginia Beach CVB	\$2,097
Warren County, CVB	\$300
White Mountains Attractions Association (New Hampshire)	\$14,907
Williams -Grand Canyon Chamber of Commerce	\$4,029
Yosemite Sierra Visitors Bureau	\$1,629
The Alabama Tourism Department	\$16,022

CONTRIBUTOR	VALUE
State of Alaska DCCED	\$5,929
Arkansas Parks & Tourism	\$13,766
Austin CVB	\$1,967
Chicago Office of Tourism & Culture	\$8,490
Colorado Tourism Office	\$11,508
Visit Dallas	\$2,390
Delaware Tourism Office	\$2,895
Visit Denver	\$2,869
Detroit Metro CVB	\$18,197
Visit Florida	\$22,078
Georgia Department of Economic Development	\$4,381
Guam Visitors Bureau	\$3,517
Hawaii Tourism Authority	\$12,492
Greater Houston CVB	\$3,028
Indiana Office of Tourism	\$1,222
Iowa Tourism Office	\$10,674
Kansas Department of Wildlife, Parks & Tourism	\$10,155
Kansas City Convention & Visitors Association	\$1,071
Kentucky Department of Travel & Tourism	\$37,586
Las Vegas Convention & Visitors Authority	\$11,222
Louisiana Office of Tourism	\$3,342
Maine Office of Tourism	\$9,639
Maryland Office of Tourism	\$26,966
Mauui VCB	\$4,703
Travel Michigan	\$7,497
Explore Minnesota Tourism	\$4,284
Missouri Division of Tourism	\$2,448
Montana Office of Tourism	\$10,582
Myrtle Beach Area Chamber of Commerce/CVB	\$2,907

CONTRIBUTOR	VALUE
Visit Nebraska	\$1,216
Travel Nevada	\$37,340
New Hampshire Div. of Travel & Tourism Development	\$3,358
New Orleans CVB	\$3,501
NYC & Company	\$6,893,595
North Carolina Division of Tourism	\$3,060
North Dakota Deptment of Commerce & Tourism Div.	\$7,027
The Ohio Tourism Office	\$3,354
Oklahoma Tourism & Recreation	\$14,145
Travel Oregon	\$68,825
Pennsylvania Tourism Office	\$8,985
Greater Philadelphia Tourism Marketing Corp.	\$14,065
Travel Portland	\$3,177
Puerto Rico Tourism Company	\$6,705

CONTRIBUTOR	VALUE
San Antonio CVB	\$5,488
Visit Savannah	\$4,087
South Dakota Department of Tourism	\$8,194
Texas Office of the Governor, Economic Development & Tourism	\$9,608
Utah Office of Tourism	\$15,240
Virginia Tourism Corporation	\$11,676
Washington Tourism Alliance	\$27,481
West Virginia Tourism	\$918
Destination DC	\$4,264
Wyoming Office of Tourism	\$4,721
Visit Myrtle Beach	\$94,631
Las Vegas CVA	\$651,114
San Antonio CVB	\$90,444
Visit Orlando	\$320,086
TOTAL	\$10,575,622



Contributions of Marketing and Advertising

CONTRIBUTOR	VALUE
Arizona Office of Tourism	\$6,000
Asheville CVB	\$990
Austin CVB	\$49,482
Best Western International	\$78,986
Capital Region USA	\$5,397
Central Oregon Visitors Association	\$1,950
CityPass	\$57,547
Colorado Springs CVB	\$598
Corning Museum of Glass (The)	\$300
ESPN	\$1,417,569
Explore Minnesota	\$67,738
Flight Centre UK Limited	\$24,682
Greater Philadelphia Tourism Marketing Corporation	\$32,000
Greater Phoenix CVB	\$500
Hana Tour	\$2,205
Hawaii Tourism Korea	\$2,235
Intrepid Travel	\$2,750
Las Vegas CVA	\$53,372
Las Vegas CVA	\$40,991
Memphis CVB	\$14,300
Missouri Div of Tourism	\$17,966
Mode Tour	\$900
NBC Universal, Orlando	\$727
New England Inns & Resorts Association	\$500
New Hampshire Division of Travel and Tourism Development	\$100
Nippon Travel Agency Co., LTD	\$1,734
Ohio Office of Tourism	\$500
Onieda County Tourism	\$2,343
Orlando Flex Ticket	\$2,343
Papillon	\$34,697
Pasadena CVB	\$1,931

CONTRIBUTOR	VALUE
Philadelphia CVB	\$20,667
Portland	\$500
Quad Cities CVB	\$3,000
R&C Tours Co. Ltd.	\$9,900
Raleigh CVB	\$1,275
Richmond CVB	\$1,166
San Diego CVB	\$3,591
San Francisco Cruises	\$10,450
Santa Barbara CVB	\$2,071
Santa Cruz County Conference and Visitors Council	\$8,669
Santa Monica Conventin and Visitors Bureau	\$2,225
Scottsdale CVB	\$4,063
South Dakota Dept of Tourism	\$22,393
Sports Travel Magazine	\$4,728
Texas Tourism	\$5,400
Thomas Cook Scheduled Businesses	\$6,717
Travel Oregon	\$21,600
Travel South	\$538
Travelbag Ltd.	\$33,366
Travelbiz	\$38,061
Utah Tourism	\$500
Veolia Transportation	\$48,522
Virginia Beach CVB	\$22,588
Virginia Tourism Corporation	\$23,452
Visit California	\$66,997
Visit Denver	\$3,641
Visit Napa Valley	\$1,944
Visit Sarasota	\$5,000
Visit Savannah	\$9,000
Visit Spokane	\$4,179
Visit USA Russia	\$18,621
Visit West Hollywood	\$1,725

CONTRIBUTOR	VALUE
West Jet	\$624,067
West Virginia Division of Tourism	\$500
Wyoming Office of Tourism	\$3,750
Yosemite National Park	\$1,000
Alaska	\$1,563
Alaska Travel Industry Assc	\$1,000
Anaheim/Orange County VCB	\$5,282
Arizona Office of Tourism	\$6,000
Austin CVB	\$18,000
Capital Region USA	\$7,460
Champaign County CVB	\$1,125
Chicago's North Shore CVB	\$1,000
City Pass	\$148,613
Conventions News Television	\$30,000
Destination DC	\$11,250
Destination DC _Hotelplan Italia	\$19,101
Discover New England	\$6,616
Donohoe Hospitality	\$645
Flexible Trips	\$93,600
Greater Houston CVB	\$118,585
H.I.S. Co., LTD.	\$13,631
Jalpak Co., Ltd.	\$36,000
JTB World Vacations	\$22,447
Kinki Nippon Tourist Co., Ltd.	\$23,438
Land of Lincoln Regional Tourism Dev Office	\$720

CONTRIBUTOR	VALUE
LEDTV	\$37,800
Los Angeles Tourism	\$352,000
Mall of America	\$93,860
Maryland	\$2,400
Memphis CVB	\$15,180
Minnesota (Explore Minnesota Tourism)	\$5,500
Missouri Div of Tourism	\$1,090
Montana Office of Tourism	\$7,962
North Carolina Office of Tourism	\$7,380
NYC & Company	\$1,185,437
Ohio Office of Tourism	\$19,500
Papillon	\$40,020
Raleigh CVB	\$17,010
San Antonio	\$20,050
South Dakota Dept of Tourism	\$29,520
Utah	\$26,250
Visit CA - Air New Zealand	\$48,995
Visit California	\$40,500
Visit Napa Valley	\$6,000
Visit Oakland	\$1,800
Visit Orlando	\$26,400
Visit Russia	\$24,646
TOTAL	\$5,534,567



Financial Review



Report of Independent Auditors
and Financial Statements
The Corporation for Travel Promotion
dba Brand USA
September 30, 2013 and 2012

MOSS ADAMS LLP

Certified Public Accountants | Business Consultants

Acumen. Agility. Answers.

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REPORT OF INDEPENDENT AUDITORS

The Audit Committee, Board of Directors, and Management
The Corporation for Travel Promotion dba Brand USA

Report on Financial Statements

We have audited the accompanying financial statements of The Corporation for Travel Promotion dba Brand USA ("CTP"), which comprise the statements of financial position as of September 30, 2013 and 2012, and the related statements of activities and changes in net assets, and cash flows for the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of CTP as of September 30, 2013 and 2012, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Emphasis of a Matter

As discussed in Note 6 to the financial statements, CTP restated its September 30, 2012 financial statements to correct an error in the timing of recognizing certain in-kind contributions. Our opinion is not modified with respect to that matter.

A handwritten signature in black ink that reads "Moss Adams LLP". The signature is written in a cursive, flowing style.

Sacramento, California

May 1, 2014

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA
STATEMENTS OF FINANCIAL POSITION

	ASSETS	
	SEPTEMBER 30,	
	2013	2012
CURRENT ASSETS		
Cash and cash equivalents	\$ 50,920,876	\$ 32,008,907
Accounts receivable, net of allowance for doubtful accounts of \$215,252 and zero for 2013 and 2012, respectively, and net of allowance for sequestration of \$6,076,278 and zero for 2013 and 2012, respectively	98,570,865	77,597,943
Prepaid expenses and other current assets	10,979,999	1,837,370
Pledges receivable	<u>22,442,858</u>	<u>2,626,915</u>
Total current assets	182,914,598	114,071,135
PROPERTY AND EQUIPMENT, net	338,503	268,417
INTANGIBLE ASSETS, net	<u>5,023,796</u>	<u>7,624,600</u>
Total assets	<u>\$ 188,276,897</u>	<u>\$ 121,964,152</u>
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts payable	\$ 15,025,745	\$ 20,555,374
Accrued expenses	1,937,088	1,558,786
Deferred revenue	<u>78,482,446</u>	<u>59,288,449</u>
Total current liabilities	<u>95,445,279</u>	<u>81,402,609</u>
NET ASSETS		
Unrestricted	70,388,760	37,934,628
Temporarily restricted	<u>22,442,858</u>	<u>2,626,915</u>
Total net assets	<u>92,831,618</u>	<u>40,561,543</u>
Total liabilities and net assets	<u>\$ 188,276,897</u>	<u>\$ 121,964,152</u>

The accompanying notes are an integral part of these financial statements

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THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA
STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS

	YEARS ENDED SEPTEMBER 30,	
	2013	2012
UNRESTRICTED NET ASSETS		
SUPPORT AND REVENUE		
Travel promotion fund proceeds	\$ 101,225,424	\$ 46,688,485
Partner contributions	34,475,139	28,214,585
In-kind contributions	70,595,594	29,902,547
Partners publishing revenue	1,270,746	1,048,115
Trade show and other revenue	706,314	957,939
Net assets released from restrictions	2,626,915	-
Total support and revenue	210,900,132	106,811,671
FUNCTIONAL EXPENSES		
Program services	162,523,737	56,913,221
General and administrative	15,922,263	12,260,711
Total functional expenses	178,446,000	69,173,932
Change in unrestricted net assets	32,454,132	37,637,739
TEMPORARILY RESTRICTED NET ASSETS		
In-kind contributions	22,442,858	2,626,915
Net assets released from restrictions	(2,626,915)	-
Change in temporarily restricted net assets	19,815,943	2,626,915
CHANGE IN NET ASSETS	52,270,075	40,264,654
NET ASSETS, beginning of year	40,561,543	296,889
NET ASSETS, end of year	\$ 92,831,618	\$ 40,561,543

The accompanying notes are an integral part of these financial statements

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

STATEMENTS OF CASH FLOWS

	YEARS ENDED SEPTEMBER 30,	
	2013	2012
NET CASH FROM OPERATING ACTIVITIES		
Change in net assets	\$ 52,270,075	\$ 40,264,654
Adjustments to reconcile change in net assets to cash from operating activities:		
Change in allowance for doubtful accounts	(215,252)	-
Change in allowance for sequestration	(6,076,278)	-
Depreciation and amortization	3,522,671	3,065,099
In-kind donation of website	-	(8,570,000)
Change in operating assets and liabilities:		
Accounts receivable	(14,681,392)	(77,597,943)
Prepaid expenses and other current assets	(9,142,629)	(1,622,463)
Pledges receivable	(19,815,943)	(2,626,915)
Accounts payable	(5,529,629)	20,282,392
Accrued expenses	378,302	647,950
Deferred revenue	19,193,997	52,147,320
Net cash from operating activities	<u>19,903,922</u>	<u>25,990,094</u>
NET CASH FROM INVESTING ACTIVITIES		
Purchase of property and equipment	(161,488)	(36,627)
Purchase of website and development	<u>(830,465)</u>	<u>(2,054,600)</u>
Net cash from investing activities	<u>(991,953)</u>	<u>(2,091,227)</u>
NET CHANGE IN CASH AND CASH EQUIVALENTS	18,911,969	23,898,867
CASH AND CASH EQUIVALENTS, beginning of year	<u>32,008,907</u>	<u>8,110,040</u>
CASH AND CASH EQUIVALENTS, end of year	<u>\$ 50,920,876</u>	<u>\$ 32,008,907</u>

The accompanying notes are an integral part of these financial statements

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THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 1 – ORGANIZATIONAL STRUCTURE

The Corporation for Travel Promotion (“CTP”), also doing business as “Brand USA,” was created by the Travel Promotion Act of 2009 (the “Act”). CTP’s mission is to promote increased foreign leisure, business and scholarly travel to the United States of America (“USA”), which in turn will drive significant economic growth and job creation in communities across the country.

CTP is a not-for-profit corporation incorporated in November 2010; subject to the provisions of the District of Columbia Non Profit Corporation Act. CTP is qualified as a tax-exempt organization under Section 501(c)(6) of the Internal Revenue Code. The public-private marketing entity works in close partnership with the travel industry to maximize the social and economic benefit of travel in communities around the country.

Under the Act, the U.S. Department of Homeland Security (“DHS”), through the Secretary of the U.S. Department of the Treasury made available to CTP initial funding, not to exceed \$10 million, for initial expenses and activities in fiscal year 2011. For each of the fiscal years 2012 through 2015, from the fees collected by DHS, the Secretary of the U.S. Department of the Treasury will transfer not more than \$100 million to CTP. For fiscal year 2012, no funds were made available to CTP until it provided a 50% match (from non-federal private sector sources) of the amount to be transferred. For each of the fiscal years 2013 through 2015, no funds will be made available to CTP unless it provides a 100% match (from non-federal private sector sources) of the amount to be transferred. The funding provided to CTP originates from visa application fees collected under section 217(h)(3)(B)(i)(I) of the Immigration and Nationality Act (8 U.S.C. 1187(h)(B)(i)(I)).

For purposes of determining the amount (other than cash) which CTP receives from non-federal private sector sources, the fair market value of goods and services (including advertising) contributed to CTP for use may be included in the determination, provided that it does not exceed 80% of the matching requirement.

CTP’s programs, activities and operations are managed and primarily supported from its corporate office in Washington, D.C.

NOTE 2 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Cash and cash equivalents – Cash and cash equivalents include cash and highly liquid investments with maturities at the date of investment of not more than three months.

Grants and accounts receivable – Accounts receivable are stated at the amount management expects to collect from outstanding balances taking into account the credit worthiness of customers and history of collection. Management provides for probable uncollectible amounts through a charge to expense and an increase to a valuation allowance based on its assessment of the current status of individual accounts. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the valuation allowance and a reduction of trade accounts receivable.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 2 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Sequestration allowance – On March 1, 2013, the Budget Control Act of 2011, P.L. 112-25 became effective, and triggered automatic cuts to spending. During fiscal 2013, CTP's funds received from the Department of Commerce under the Travel Promotion Act, were automatically reduced by sequestration ranging from 5.1% to 7.2%. As a result, CTP has recorded an allowance for the sequestration expected to be withheld from future collections on its accounts receivable due from the Department of Commerce as of September 30, 2013.

Property and equipment – Property and equipment is stated at acquisition cost, or at the estimated fair value at the date of gift, if donated, net of accumulated depreciation or amortization. All donated assets are reported as unrestricted support unless donors' stipulations specify how the assets are to be used. Depreciation is computed using the straight-line method over the estimated useful lives of the assets, generally ranging from three to five years. Leasehold improvements are amortized using the straight-line method, over the shorter of the life of the improvement or the lease term. Expenditures for maintenance and repairs are charged to operations as incurred, while renewals and betterments are capitalized. When property and equipment is retired or otherwise disposed of, the cost and related accumulated depreciation or amortization are removed from the accounts and any resulting gain or loss is reflected in the statement of activities and changes in net assets for the period.

Pledges receivable – In-kind contributions with future economic benefit, are capitalized until the benefit of such contributions has been received. At September 30, 2013 and 2012, pledges receivable consist of donated advertising and marketing campaigns, which are scheduled to run during fiscal 2014.

Indefinite-lived intangible assets – Identifiable intangible assets deemed to have indefinite lives are subject to annual impairment tests. Depending upon the results of that review, the recorded intangible assets may be written down when their carrying value exceeds their estimated fair value. Management, using its best estimates based on reasonable and supportable assumptions and projections, reviews indefinite-lived intangible assets, annually, or in certain circumstances, as required, for impairment. Management has concluded that no impairment exists as of September 30, 2013.

Amortizing intangible assets – Amortizing intangible assets are stated at fair market value at the date of contribution, net of accumulated amortization. Amortization is provided on the straight-line method over the estimated useful life. When intangible assets are retired or otherwise disposed of, the cost and related accumulated amortization are removed and any resulting gain or loss is reflected in the statement of activities and changes in net assets for the period. Amortizing intangible assets consist of a website, which is amortized over two years.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 2 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Deferred revenue – CTP has the right to receive travel promotion funds (earmarked by the Department of Commerce) upon submission of qualified matching contributions. For fiscal years 2013 and 2012, CTP was subject to a 100% and 50% match, respectively, (from non-federal private sector sources) of the amount to be transferred. Such funds are recorded as accounts receivable and deferred revenue upon submission to the Department of Commerce, and recognized in the statements of activities, as travel promotion fund proceeds to the extent that CTP fulfills the revenue recognition criteria. Management has determined that revenue recognition occurs upon fulfilling the purpose of the donated funds; expending on programs, activities and operations to promote increased foreign leisure, business and scholarly travel to the USA. For fiscal years 2013 and 2012, CTP received travel promotion funds of \$121.2 million and \$98.5 million, respectively.

Net asset presentation – CTP classifies resources into three net asset categories according to externally-imposed restrictions:

- *Permanently restricted net assets* are comprised of the historical dollar amount of gifts, including pledges, which are required by donors to be permanently retained and only expended to the extent of earnings on investment of the funds. CTP had no permanently restricted net assets as of September 30, 2013 and 2012.
- *Temporarily restricted net assets* are comprised of in-kind contributions with future economic benefit. Such contributions consist of donated advertising and marketing campaigns, which are scheduled to benefit CTP in future periods.
- *Unrestricted net assets* are all the remaining net assets of CTP, including those derived from revenues of project activities, government grants and unrestricted donations and pledges. Unrestricted net assets may be, in part, limited as to use by contractual agreements with outside parties.

When a donor restriction expires, that is when a stipulated purpose restriction is accomplished or a time restriction ends, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statements of activities and changes in net assets as net assets released from restrictions. However, donor-restricted contributions for which restrictions are met in the same reporting period as the contribution is received are recorded as unrestricted support.

Travel promotion fund proceeds – Federal appropriations are reported as support and revenue in the period the Travel Promotion Act makes them available. The appropriation remains available until expended. Unexpended funds are reported as deferred revenue until expended.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA NOTES TO FINANCIAL STATEMENTS

NOTE 2 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

In-kind contributions – In-kind contributions are valued at fair market value, which is defined as the price that property would sell for on the open market. It is the price that would be agreed on between a willing buyer and a willing seller, with neither being required to act, nor both having reasonable knowledge of the relevant facts. CTP recognizes the fair value of donated services received if such services a) create or enhance nonfinancial assets or b) requires specialized skills that are provided by individual possessing those skills and would typically need to be purchased if not donated.

Functional expenses – The costs of providing the program and general and administrative activities have been summarized on a functional basis in the statement of activities and changes in net assets. Most expenses are directly charged to the respective program or supporting activity. Certain costs have been allocated among the program and support services benefited based upon management's estimate of each program's share of the allocated costs.

Program service activities, representing marketing, business development and strategic outreach programs to promote increased foreign leisure, business, and scholarly travel to the USA, are expensed as incurred.

CTP does not have any fundraising expenses.

Advertising costs – Advertising costs are expensed as incurred.

Income taxes – CTP is exempt from federal income taxes under the provisions of Section 501(c)(6) of the Internal Revenue Code. Contributions to CTP are not tax deductible by donors under Section 170(c)(2) of the Internal Revenue Code. CTP uses a comprehensive model for recognizing, measuring, presenting and disclosing in the financial statements tax positions taken or expected to be taken on a tax return. A tax position is recognized as a benefit only if it is “more likely than not” that the tax position would be sustained in a tax examination, with a tax examination being presumed to occur. The amount recognized is the largest amount of tax benefit that is greater than 50% likely of being realized on examination. For tax positions not meeting the “more likely than not” test, no tax benefit is recorded. CTP does not believe its financial statements include any uncertain tax positions. CTP files income tax returns in the U.S. federal jurisdiction and in the District of Columbia. Generally, CTP is subject to examination by U.S. federal (or state and local) income tax authorities beginning in 2010, which is the year of CTP's inception.

Concentration of credit risk – CTP maintains cash in bank deposit accounts, which, at times, may exceed federally insured limits. CTP has not experienced any losses in any of its accounts. CTP believes it is not exposed to any significant credit risk on cash and cash equivalents.

As of each September 30, 2013 and 2012, approximately 99%, of the CTP's accounts receivable came from one grantor.

For 2013, approximately 44% of the CTP's in-kind contributions came from two donors, approximately 35% of partners publishing revenue is associated with two partners, and 77% of trade show revenue came from one donor.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 2 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Concentration of credit risk (continued) – For 2012, approximately 54% of the CTP’s in-kind contributions came from three donors, approximately 11% of partners publishing revenue is associated with one partner, and 46% of trade show revenue came from two donors.

For 2013 and 2012, approximately 1% and 21% of in-kind contributions came from members of the Board of Directors, respectively. For 2013, approximately 9% of partner contributions came from members of the Board of Directors. For 2012, none of the partner contributions came from members of the Board of Directors.

Estimates – The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Actual results could differ from those estimates.

Subsequent events – Subsequent events are events or transactions that occur after the statement of financial position date, but before financial statements are available to be issued. CTP recognizes in the financial statements the effects of all subsequent events that provide additional evidence about conditions that existed at the date of the statement of financial position, including the estimates inherent in the process of preparing the financial statements. CTP’s financial statements do not recognize subsequent events that provide evidence about conditions that did not exist at the date of the statement of financial position, but arose after the statement of financial position date and before financial statements were available to be issued. CTP has evaluated subsequent events through May 1, 2014, which is the date the financial statements were available to be issued as approved by management.

NOTE 3 – PROPERTY AND EQUIPMENT

Property and equipment consist of the following at September 30:

	<u>2013</u>	<u>2012</u>
Furniture	\$ 322,998	\$ 296,565
Computer equipment	57,946	40,376
Leasehold improvements	<u>119,335</u>	<u>1,850</u>
	500,279	338,791
Accumulated depreciation	<u>(161,776)</u>	<u>(70,374)</u>
	<u>\$ 338,503</u>	<u>\$ 268,417</u>

For 2013 and 2012, depreciation expense of \$91,402 and \$65,099, respectively, is included in general and administrative expense in the statements of activities and changes in net assets.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 4 – INTANGIBLE ASSETS

Intangible assets consist of the following at September 30:

	<u>Useful Life</u>	<u>2013</u>	<u>2012</u>
Cost basis			
Website	2 years	\$ 8,055,065	\$ 7,224,600
Brand name	Indefinite	<u>3,400,000</u>	<u>3,400,000</u>
		11,455,065	10,624,600
Accumulated amortization		<u>(6,431,269)</u>	<u>(3,000,000)</u>
		<u>\$ 5,023,796</u>	<u>\$ 7,624,600</u>

In 2012, the U.S. Travel Association donated the Discover America website and brand name to CTP. CTP utilized the services of an independent valuation firm to assist in the estimation of the fair value of the donated assets. The assets were valued utilizing the cost approach, which is based on consideration of the costs to recreate the assets. The valuation resulted in an estimated fair value of \$9,400,000, but CTP paid the U.S. Travel Association a nominal fee of \$830,000 as was specified in the donation agreement. Management allocated \$6,000,000 of the contributed assets to the website, based on management's best estimate to rebuild and or purchase an established website, and assigned the remaining fair value of \$3,400,000 to the Discover America brand name. Management determined that the website had an estimated useful life of two years, and the brand name had an indefinite life. During 2013 and 2012, CTP also capitalized \$830,465 and \$1,224,600, respectively, of additional website development costs incurred and recognized \$3,431,269 and \$3,000,000 of amortization expense, respectively, included in general and administrative expense in the statements of activities and changes in net assets. Future amortization, including amortization of additional website development costs, is expected to be approximately \$1,209,000 and \$415,000 for 2014 and 2015, respectively.

NOTE 5 – COMMITMENTS AND CONTINGENCIES

Operating lease – CTP leases the corporate facility under an operating lease agreement that expires in September 2020. Minimum rental payments under the operating lease are recognized on a straight-line basis over the term of the lease including any periods of free rent. Total rent expense for the lease for the years ended September 30, 2013 and 2012 totaled \$668,524 and \$664,387, respectively. The related deferred rent liability for the operating lease at September 30, 2013 and 2012 totaled \$347,360 and \$289,286, respectively, and is recorded as a component of accrued expenses in the statement of financial position.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 5 – COMMITMENTS AND CONTINGENCIES (CONTINUED)

The future minimum annual lease payments under the non-cancellable operating lease are as follows:

<u>Years ending September 30,</u>	
2014	\$ 620,711
2015	636,277
2016	712,960
2017	730,840
2018	749,102
Thereafter	<u>1,487,875</u>
	<u>\$ 4,937,765</u>

Travel promotion funds – CTP receives significant amounts of federal funding from visa application fees collected from international travelers to the USA. These funds are subject to audit by federal agencies. Management believes that adjustments, if any, would not have a significant effect on the financial statements.

Employment agreements – CTP has employment agreements with certain officers of the organization. The agreements provide for annual compensation and benefit amounts. In the event of termination of employment without cause, the officers' then current base salary would continue for a period of six months following the termination.

U.S. Travel Association agreement – CTP entered into a sponsorship agreement with U.S. Travel Association to be the premier sponsor of the International Pow Wow Conference (the "Conference") for four years from 2012 through 2016. The Conference is a travel industry trade event that has been occurring annually for approximately 45 years. As part of this sponsorship, CTP is able to sell certain marketing opportunities to private companies. CTP will make annual payments of \$1.0 million for four years, commencing in 2012.

NOTE 6 – RESTATEMENT

During fiscal 2013, management identified \$4,702,391 of in-kind contributions for donated advertising and marketing campaigns, which were contributed and utilized during fiscal 2012, and \$2,626,915 of in-kind contributions for donated advertising and marketing campaigns, which were contributed during fiscal 2012, but not utilized until fiscal 2013. These amounts had not been reported in fiscal 2012. As a result, CTP restated its 2012 account balances to correctly report these in-kind contributions. Pledges receivable, temporarily restricted net assets, and temporarily restricted in-kind contributions of \$2,626,915 were recorded, and unrestricted in-kind contributions and in-kind expense, reported as a component of program service expense in the statement of activities and changes in net assets, of \$4,702,391 were recorded.

THE CORPORATION FOR TRAVEL PROMOTION DBA BRAND USA

NOTES TO FINANCIAL STATEMENTS

NOTE 6 – RESTATEMENT (CONTINUED)

The following table sets forth the previously reported and restated amounts of selected items within the statement of financial position as of September 30, 2012 and within the statements of activities and changes in net assets and cash flows for the year then ended:

	<i>As restated</i> 2012	<i>As previously reported</i> 2012
Statement of Financial Position		
Pledges receivable	\$ 2,626,915	\$ -
Total current assets	114,071,135	111,444,220
Total assets	121,964,152	119,337,237
Temporarily restricted net assets	2,626,915	-
Total net assets	40,561,543	37,934,628
Total liabilities and net assets	121,964,152	119,337,237
Statement of Activities and Changes in Net Assets		
In-kind contributions – unrestricted	29,902,547	25,200,156
In-kind contributions – temporarily restricted	2,626,915	-
Total support and revenue	106,811,671	102,109,280
Program services	56,913,221	52,210,830
Total functional expenses	69,173,932	64,471,541
Net assets, beginning of year	296,889	296,889
Net assets, end of year	40,561,543	37,934,628
Change in temporarily restricted net assets	2,626,915	-
Change in net assets	40,264,654	37,637,739
Statement of Cash Flows		
Change in net assets	40,264,654	37,637,739
Pledges receivable	(2,626,915)	-



Partners

Brand USA gratefully acknowledges the generosity and commitment of its partners.

Founding Partners

Beginning in FY2015, the Founding Partner designation will be retired and used to designate those partners who made significant contributions to Brand USA at the very beginning. Founding Partners will be recognized in perpetuity for their significant contributions of \$1 million or more of cash, in-kind or a combination thereof during Brand USA's first year in operation. The contributions made by the partners listed below were critical to the launch of Brand USA and the inaugural marketing campaign. As a result of their contributions during Brand USA's founding year, Brand USA was able to begin operations with a solid foundation from which to build.



Best Western



Visit California



Disney

Enterprise Holdings,
LLC.

Visit Florida



Hilton Worldwide



Discover Illinois



Las Vegas CVA

Marriott
International, Inc.Massachusetts Office
of Travel and Tourism

New York City



Visit Orlando



U.S. Travel Association



Universal Studios

Diamond Partners (contributions of \$1 million or more*)



Air Canada



British Airways



Visit California



Choose Chicago



Enterprise Holdings, LLC.



ESPN



Expedia



Visit Florida



Hilton Worldwide



Discover Illinois



Las Vegas CVA



Los Angeles Tourism



Louisiana Travel



MacGillivray Freeman Films



Massachusetts Office of Travel & Tourism



Myrtle Beach



National Geographic



New York City



Orbitz Worldwide



Visit Orlando



Osceola County DTD/Kissimmee



SeaWorld



STA Travel



Texas Tourism



The Guardian



Thomas Cook



TripAdvisor



TTG Media



U.S. Travel Association



United Airlines



Universal Studios Orlando



Virgin Holidays



World Baseball Classic

Platinum Partners (contributions of \$550,000-\$999,999)



Air Berlin

Arizona Office of
Tourism

BS Fuji

Caesars
EntertainmentMarriott International,
Inc.National Football
LeagueNew Mexico
Department of
TourismOregon Tourism
Commission

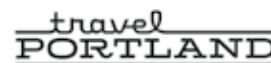
Porter Airlines

Preferred Hotel
Group

SAG/AFTRA

Seattle Convention &
Visitors BureauStarwood Hotels &
Resorts

Travel Brands



Travel Portland



Visit San Antonio



West Jet

Gold Partners (contributions of \$250,000 to \$499,999)

Buffalo Niagara Convention & Visitors Bureau

Cirque du Soleil

CityPass, Inc.

Destination DC

Disney Parks & Resorts Worldwide

Georgia Department of Economic Development

Lee County (Ft. Myers)

Mall of America

Greater Miami Convention & Visitors Bureau

Michigan Economic Development Corporation

Missouri Division of Tourism

New Orleans Convention & Visitors Bureau

PhoCusWright

Qantas Airways

Readers Digest

Scenic Tours

South Carolina Department of Parks,
Recreation & Tourism

South Hall

Where Are You Now (WAYN)

Wyoming Office of Tourism

Silver Partners (contributions of \$100,000-\$249,999)

American Express International	International Media Organizations (IMO)
American Sky	Japan Airlines Co. Inc. (JAL)
Asiana Airline Inflight TRIAD IBS	Memphis Convention & Visitors Bureau
Auckland International Airport	Visit Montana
Austin Convention & Visitors Bureau	Myrtle Beach Golf Holiday
Australia Pacific Touring	Nevada Department of Tourism & Cultural Affairs
Baxter Travel Media	New York State
Bay Area Houston Convention & Visitors Bureau	Ocean USA
Capital Region USA	Philadelphia Convention & Visitors Bureau
Charleston Area Convention & Visitors Bureau	Qatar Airways
Choice Hotels International	ROAD ABC Media
Cleverdis Discover	San Diego CVB
New England	Smart Destinations
Enfoque del Café	Societa Geografica Italiana
General Growth Services	Southern State Tourism Offices
Great Lakes USA	Visit Tampa Bay
Greater Fort Lauderdale Convention & Visitors Bureau	Tennessee Department of Tourist Development
Greater Philadelphia Tourism Marketing Corporation	Travel South Dakota
Guam Visitors Bureau	TravMedia
Idaho Department of Commerce	Turner Japan
	Utah Office of Tourism

Bronze Partners (contributions of \$10,000-\$99,999)

Air New Zealand	The Broadmoor
Alabama Tourism Department	Canusa Touristik GmbH & Co. KG
Alton Regional Convention & Visitors Bureau	Cape Cod Chamber of Commerce
America Unlimited GmbH	Carlson Hotels
Visit Anchorage	Chickasaw Nation
Andar de Viaje	Clackamas County Tourism & Cultural Affairs
Annapolis & Anne Arundel County Conference & Visitors Bureau	Colorado Ski Country
Arkansas Parks & Tourism	Colorado Tourism Office
Asheville CVB	Convention News Television
Ashford Hospitality Trust LP	Cosmopolitan Las Vegas
Aspen Snowmass	Denver Convention & Visitors Bureau
Atlanta CVB	Destination Marketing Association International
Atlantic City CVB	Detroit Metropolitan Convention & Visitors Bureau
Aurora Area Convention and Visitors	Diversity Tourism
Branson Convention & Visitors Bureau	Dupage Convention & Visitor's Bureau
	Durango Area Tourism Office

Embassy Suites Waikiki Beach	Macerich
ES Tour	Macy's
Finger Lakes Regional Tourism Alliance	Maine Office of Tourism
Finger Lakes Visitors Connection	Mammoth Lakes Tourism
Flexible Trips Flight Centre UK Limited	Marianas Visitors Authority
Fort Worth Convention and Visitors Bureau	Maryland Office of Tourism
Great River Road Illinois (Macomb)	MGM Mirage Las Vegas
Great Rivers Country	MGM Resorts
H.I.S. Co., LTD.	Explore Minnesota
Hana Tour	Monroe - West Monroe
Harrisonburg TVS	Visit Napa Valley
Hawaii Tourism Authority	Nashville Convention & Visitors Corp.
Hawaii Visitors and Convention Bureau	Natchitoches Parish Tourism
Hayes and Jarvis	New Hampshire Division of Travel & Tourism Development
Hilton Head CVB	North Carolina Division of Tourism
Houma Area Convention & Visitors Bureau	North Dakota Department of Commerce
House and Garden	Northern VA Visitors Consortium
Iceland Air Scandinavia	Novak Birch
InterContinental Hotels Group	Ohio Office of Tourism
Intercontinental The Barclay New York	Oklahoma Tourism & Recreation
Iowa Tourism Office	Oneida County Tourism
Visit Jacksonville	Outdoor Revolution Ltd.
Jalpak Co., Ltd.	The Official Tourism Marketing Corporation for The Palm Beaches
Jetline Travel	Papillon
JTB World Vacations	Greater Phoenix Convention & Visitors Bureau
Kansas Department of Wildlife, Parks & Tourism	PM Publishing Solutions
Kentucky Department of Travel & Tourism	Pocono Mountains Visitors Bureau
Kiawah Island Golf Resort	Prince William County & Manassas Convention and Visitors Bureau
Kinki Nippon Tourist Co., Ltd.	Raleigh CVB
KLM Royal Dutch Airlines (Finland)	Red Roof Inns, Inc.
Visit Knoxville	Visit Redding
Kuoni Reisen AG	Reservationsystem.com/Bookit.com
Lafayette Convention & Visitors Commission	San Diego International Airport
Lake Charles Convention & Visitors Bureau	San Francisco Cruises
LEDTV	San Marcos Convention & Visitors Bureau
Let's Travel Magazine	Santa Monica Convention and Visitors Bureau
Liftopia	Visit Savannah
LimeTree Media	Shenandoah Valley Travel Association
Little Rock	Shop America Alliance
Loews Hotels	
LVH Hotel Las Vegas	

Shreveport-Bossier Convention & Tourism Bureau	Vail Valley Foundation
St. Augustine	Veolia Transportation
St. Petersburg/Clearwater CVB	Virginia Beach CVB
St. Tammany Tourist & Convention Commission	Virginia Tourism Corporation
Station Casinos	Visit USA Russia
Sunwing Vacations Inc.	Visit USA Spain
Syracuse Convention & Visitors Bureau	Washington Tourism Alliance
Taubman Tax Free Shopping	Watkins Glen International
Travel Weekly Group	Westfield San Francisco Centre
Travelbag Ltd.	West Hollywood Marketing & Visitor's Bureau
Travelbiz	West Virginia Tourism
Travelocity	White Mountains Attractions (NH)
U.S. Chamber of Commerce	Wynn Las Vegas
Vail Resorts Management Co.	

Supporting Partners (contributions of \$10,000 and below)

Accor North America	Diamond Resorts International
Visit Akron-Summit	Disney Destinations
State of Alaska Division of Economic Development	Donohoe Hospitality
Alaska Travel Industry Association	Econo Lodge Times Square
Amalfi Hotel Chicago (Hostmark)	Empire Hotel
America As You Like It	enVision Hotel
Anaheim Orange County Visitor & Convention Bureau	Fairbanks Convention & Visitors Bureau
Archers Direct/CosmosAir	Fairmont Hotels and Resorts
AviaReps Marketing Garden	Federal Realty
Bloomington CVB	Flagler County Chamber of Commerce
Bowling Green Area Convention & Visitors Bureau	Visitor's Center
California Academy of Sciences	Florida's Space Coast
Canada Reise Dienst	Greater Fredericksburg Tourism Partnership
Central Oregon Visitors Association	G Adventures
Chicago Northwest	Galleria Dallas
Chicago's North Shore CVB	Gettysburg Travel
Cincinnati Convention & Visitors Bureau	Grand Canyon Railway
Cleveland Convention & Visitors Bureau	Greater Columbus Convention & Visitors Bureau
Visit Colorado Springs	Greater Palm Springs Convention & Visitors Bureau
Connect Worldwide International Inc.	Greater Pittsburgh Convention & Visitors Bureau
Cruisenation.com	Hana Tour
Dallas Convention & Visitors Bureau	Hertz Global Holdings, Inc.
Delaware Tourism Office (Delaware Economic Development Office)	The Holiday Place

Hornblower Cruises and Events
 Indiana Office of Tourism
 Visit Indy
 Intrepid Travel
 Jay Peak Resort
 Jekyll Island Authority (Georgia)
 Kansas City Convention & Visitors Association
 Kwik Travel Lake
 Havasu Tourism Bureau Lakes Region
 Tourism Association
 Land of Lincoln Regional Tourism
 Development Office
 Visit Loudoun County
 Macon Convention and Visitors Bureau
 Visit Martin County
 Maui Convention & Visitors Bureau
 Mississippi River Country USA
 Mode Tour
 Modern Management Services, LLC
 Mundo Turistico
 National Tour Association (NTA)
 Visit Nebraska
 New England Inns & Resorts Association
 Visit New Haven
 Visit Newport Beach
 Nippon Travel Agency Co., LTD
 North America Travel
 Visit Oakland
 Orlando Flex Ticket
 Pasadena CVB
 Pennsylvania Tourism Office
 Phoenix International Publishing, LLC
 Plymouth County CVB
 Visit Pontiac, Illinois
 Premium Outlets
 Quad Cities CVB
 R&C Tours Co. Ltd.
 Red Lion Anaheim Maingate
 Richmond CVB
 Rockford Area CVB
 San Juan Islands Visitors Bureau
 Santa Barbara CVB
 Santa Cruz County Conference and Visitors Council
 Visit Sarasota
 Scottsdale Convention & Visitors Bureau
 Sonoma County Tourism
 South Street Seaport & Museum
 Visit Spokane
 Sports Travel Magazine
 TAP PORTUGAL
 Telluride Ski Resort
 Telluride Tourism Board
 Tour America Inc.
 Tour Magazine
 Trump International Hotel & Tower Las Vegas
 UM Detroit
 Warren County (Ohio)
 White Pass Scenic Byway (Washington)
 Wiechmann Tourism Service
 Williams Chamber of Commerce (Arizona)
 Yosemite National Park



Board of Directors

Board of Directors

Brand USA is governed by an 11-member Board of Directors appointed by the U.S. Secretary of Commerce in consultation with the Secretary of State and the Secretary of Homeland Security. Each brings expertise in diverse regions and the sectors of the travel industry designated by the Travel Promotion Act. As of May 1, 2014, the following business leaders serve on the board of directors of Brand USA:



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Chair of the Board

President & CEO
Jackmont Hospitality, Inc.
Member: Finance Committee
Member: Governance and Nominating Committee



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Vice Chair

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Member: Marketing Committee



Mark Schwab

CEO, Star Alliance Services
GmbH
Member: Audit Committee



Diane Shober

State Tourism Director,
Wyoming Office of Tourism
Member: Marketing Committee



Chef Roy Yamaguchi

Owner & Founder
Roy's Restaurant
Chair: Audit Committee



Executive Leadership

Executive Leadership



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President & CEO



Anne C. Madison
Chief Communications Officer



Donald F. Richardson
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Senior Vice President,
Global Partner Marketing



Alfredo Gonzalez
Senior Vice President,
Global Partnership
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Amir Eylon
Vice President,
Partner Engagement



Jay Gray
Vice President,
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Development



Karyn Gruenberg
Vice President,
Partner Programs and
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