

FY14 Business Plan

Published November 18, 2013

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Brand USA





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Dear Partners in Travel,



We are pleased to present Brand USA's business plan for FY2014. Within these pages, we've outlined our role in the industry, our key learnings and successes from the prior year, and our plans for the coming year to inspire hundreds of thousands of new travelers to come to the United States.

You'll also find ways you can engage with Brand USA and be part of this industry-defining opportunity.

We realize that the work we do is more than just about promoting and marketing the world's premier travel destination. As we welcome more and more of the world's travelers to visit our diverse destinations, unique experiences, and national treasures, we are helping to create jobs, build our economy, and strengthen the foundation of communities across the country.

Over the past year, we made significant progress as we transitioned from a start-up to a cooperative destination marketing organization.

Since launching the first wave of our consumer marketing campaign in Canada, Japan, and the United Kingdom in 2012 to outstanding results that increased intent to visit the United States from 12 to 22 percent, we went on to expand the campaign to 11 markets in 2013: Australia, Brazil, Canada, China, Germany, Hong Kong, Japan, Mexico, South Korea, Taiwan, and the United Kingdom—representing 75% of inbound travel.

We also greatly increased our international representation network and our direct outreach and promotion with the travel trade. We currently have offices representing the United States' travel and tourism interests in Australia, Austria, China, Germany, Hong Kong, India, Ireland, Japan, New Zealand, South Korea, Switzerland, Taiwan, and the United Kingdom. Over the next few months, we will open additional offices to work with the travel trade and promote the United States in the Benelux (Belgium, the Netherlands, and Luxembourg), France, Latin America (Andean Region, Brazil, Mexico, Southern Cone), Russia, and Scandinavia (Denmark, Norway, and Sweden). Travel from these markets make up more than 95 percent of visitation and spend to the United States.

In addition, we have established a unified presence for the country at trade shows around the world. We supported the administration's National Travel and Tourism Strategy by conducting joint promotional campaigns, providing collateral for Federal efforts, and coordinating a variety of in-market activities.

All of this was possible because of the commitment of our nearly 300 partners. As a result, we have been able to maximize the support of Federal matching funds provided by the Travel Promotion Act and re-invest those funds in programs, platforms, and marketing strategies that enable us to continue to roll out the welcome mat to the world.

Our focus is now on greatly expanding and developing new cooperative marketing platforms and programs that add and create value while generating a strong return on investment for everyone with a vested interest in increasing international visitation to the United States.

As we continue to work together to promote the United States as the world's premier travel destination, we thank you for your ongoing support.

Together we are Brand USA!

A handwritten signature in black ink, appearing to read 'C. Thompson'.

Christopher L. Thompson
President & CEO
Brand USA



About Brand USA

About Brand USA

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

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

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

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

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

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

Mission

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

Vision

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

Values

Performance Excellence:

A corporate culture of visionary and performance-driven leadership, strategic planning and a management that deploys resources to their highest and most productive uses

Integrity:

A corporate culture with assured reliance on ability, actions, character, diversity, honesty, respect, transparency, and trust

Fun:

A corporate culture with a memorable and unique personality that fosters creativity, innovation, and high achievement for itself and its partner organizations

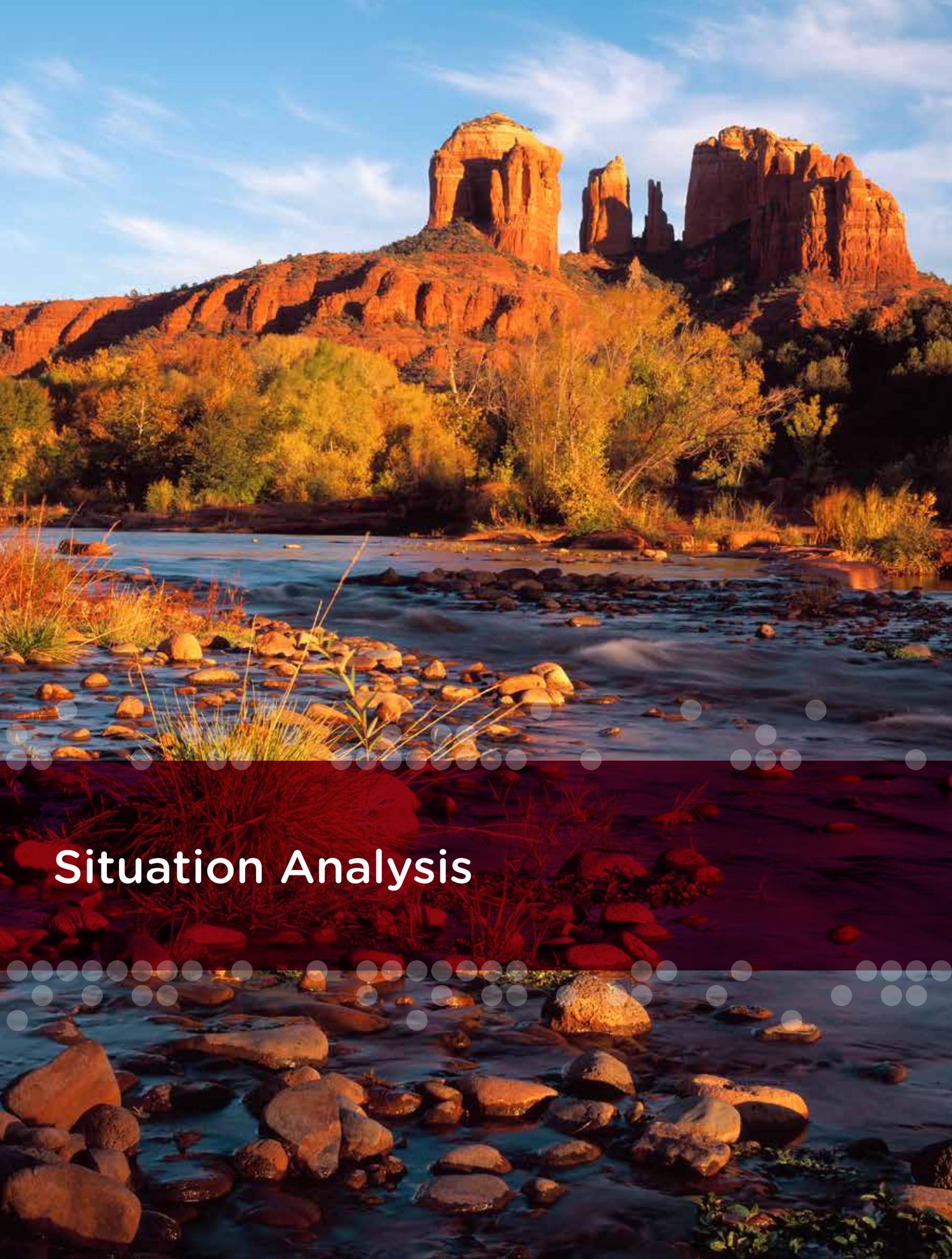
Our Role in the Travel Industry

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

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

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





Situation Analysis

Where We Are

A strengthening but still struggling economy

International travel is growing more than three times as fast as U.S. GDP, helping to pull the economy toward economic and job recovery. According to the Bureau of Economic Analysis, inbound travel and tourism grew at an annualized rate of 6.8 percent in the first three months of 2013 while the U.S. economy grew at an annualized pace of 2.4 percent over the same period. And travel is leading the economic recovery despite slowed growth in prices, which increased only 0.3 percent in the first quarter of 2013 compared with 2.4 percent in the fourth quarter of 2012. The biggest contributors to the growth were passenger flights and other transportation-related industries like rental cars.

The travel and tourism industry is also hiring people at a much faster rate than other sectors of the U.S. economy. Employment in the industry grew 2.3 percent in the first quarter of 2013 while employment in the overall U.S. economy increased by 1.9 percent.

While the U.S. trade deficit in 2012 was \$540.4 billion (actually down 3.5 percent from 2011) the travel and tourism industry boasted a trade surplus of \$47.5 billion in 2012. Stable exports and the consistent trade surplus generated in the international travel industry are critical to the vitality of the U.S. economy and the creation of high-quality jobs.

The Opportunity

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

It is a truth that travel is a powerful economic engine—with international inbound travel one of the largest exports for the United States. Ranking ahead of agricultural goods and motor vehicles, it is the single-largest services-sector export, accounting for 25 percent of all services exports in 2012 and a 6.5 percent share of world travelers.

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

According to the Department of Commerce, in 2012, 67 million international visitors came to the United States, an

increase of 7 percent over the prior year—with 11 of the top 15 markets posting year-over-year increases. These visitors spent a record \$165.6 billion on goods and services, which are counted as U.S. exports. In total, spending by international travelers while traveling the United States supported 1.2 million American jobs.

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

THE OPPORTUNITY

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



Source: U.S. Travel Association

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

According to the Department of Commerce, in 2012 visitation (67 million) was up 7 percent compared to the same period in 2011 with 11 of the top 15 markets posting increases.

According to the United Nations World Tourism Organization (UNWTO), global international tourist arrivals grew 4 percent from 2011 to 2012, surpassing the 1 billion mark for the first time. Emerging markets are

fueling a substantial portion of this growth, and China is now the world's largest in terms of international tourism expenditure. In 2012, Chinese travelers spent \$102 billion in international markets, reflecting an increase of 37 percent from the prior year. By 2030, the UNWTO forecasts tourist arrivals to reach 1.8 billion. Emerging markets are expected to grow their share of visitors substantially, from 47 percent in 2012 to 57 percent in 2030.

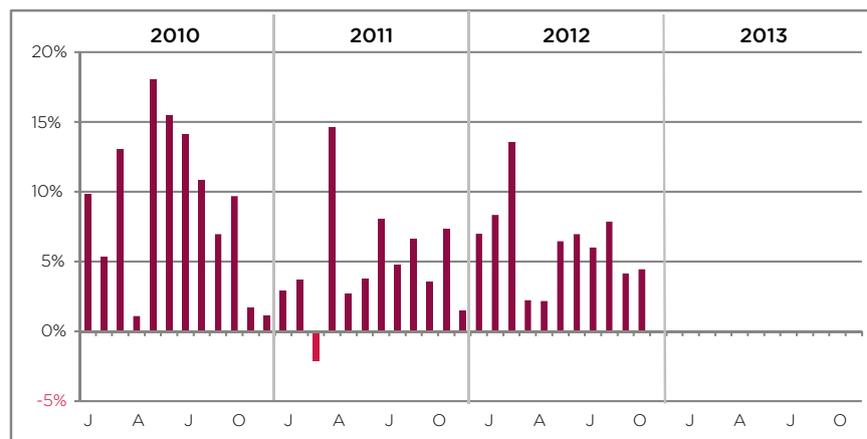
U.S. Visitation

The United States welcomed a record-breaking number of visitors from most regions around the world in 2012. Visitor spending climbed to new heights, with the UNWTO reporting a 9 percent increase, to \$166 billion and the U.S. Department of Commerce reporting a 10 percent increase to \$168 billion.

The year-over-year increase in one year is a remarkable result, but this growth is particularly strong in light of the economic challenges that hampered visitation from historically key markets in Europe. Growing visitor volume and expenditure is Brand USA's ultimate objective, and lessening visitor declines during economically weak time periods is a key part of that objective. Despite limitations in growth due to these economic headwinds, robust marketing efforts in Europe remain critical to keep U.S. destinations top of mind.

The mature-market level of travel demand in top European markets inherently sets their growth at a moderate pace even when their economic footing is solid, while emerging markets like China and Brazil are growing at a dramatic pace (+35 percent and +19 percent, respectively in 2012). As new travelers from emerging markets around the world leave their borders for the first time, the cooperative efforts of agencies that support the Travel Promotion Act have been invaluable in paving the way for this growth to occur. The demand generated and enhanced by Brand USA's promotional activities has been met with effective efforts to reduce visa wait times in key growth markets such as India and China.

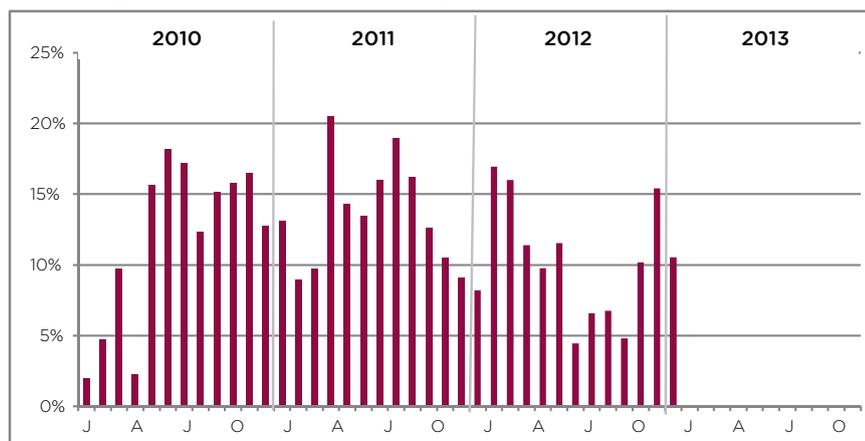
International Travelers to the USA
(% change same month previous year)



Sources: Department of Homeland Security I-94 record of arrivals; Statistics Canada; Banco de Mexico.

Notes: International traveler volume excludes day trips, and, for countries requiring visas, includes visitors on one of 14 specific visa types. Percentage changes for the months of March and April are subject to the influence of when the Easter break occurs

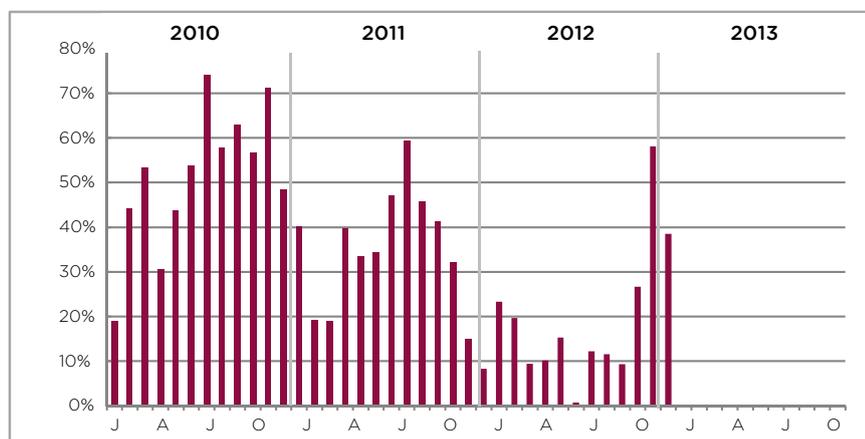
International Traveler Spending in the USA (exports)
 (% change same month previous year)



Sources: U.S. Department of Commerce; Bureau of Economic Analysis.

Notes: Spending includes both spending within the USA and passenger fares to travel to the USA on U.S. carriers (both exports).

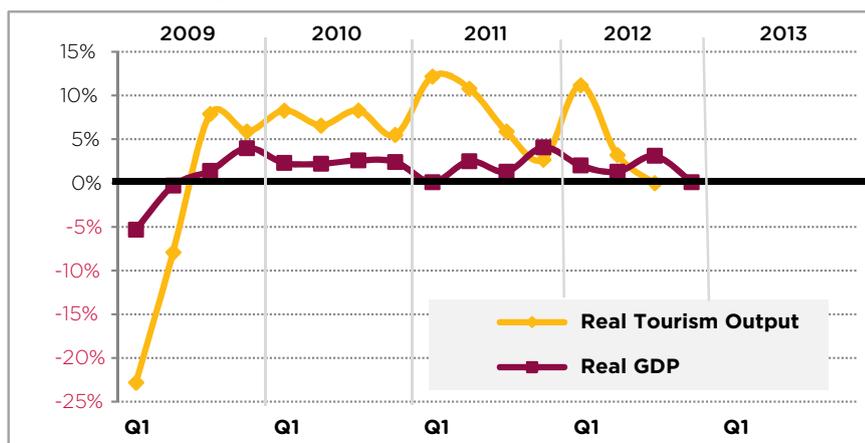
Travel Trade Balance
 (% change same month previous year)



Sources: U.S. Department of Commerce; Bureau of Economic Analysis.

Notes: Spending includes spending within the USA and passenger fares to travel to the USA. Changes reflect the interplay between export travel spending and passenger fares and import travel spending and passenger fares (4 items).

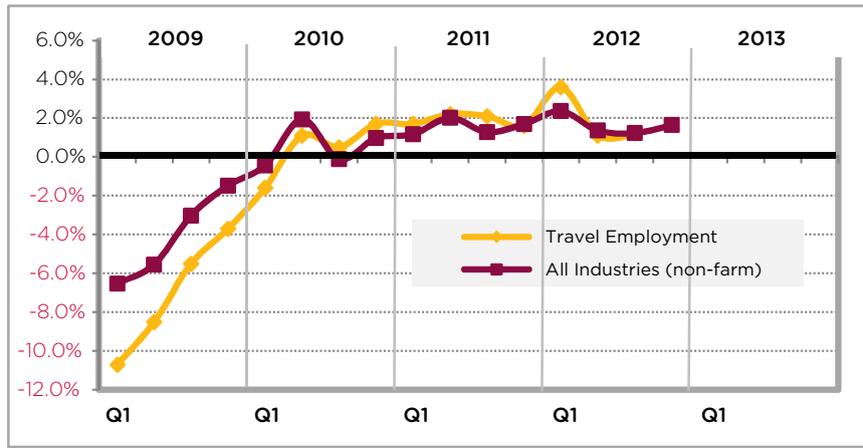
OUTPUT: Travel Industry vs. All Industries
 (quarterly change rate of annualized data)



Sources: U.S. Department of Commerce; Bureau of Economic Analysis.

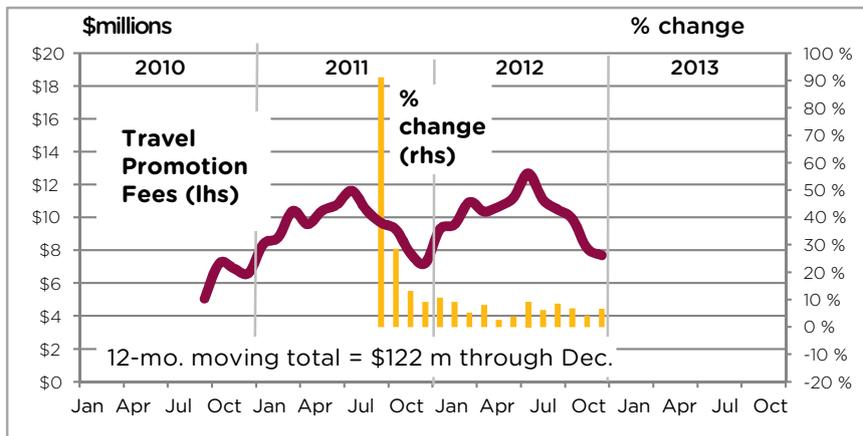
Notes: Both output measures are subject to revision. Real tourism output includes direct plus indirect tourism output.

EMPLOYMENT: Travel Industry vs. All Industries
(quarterly change rate of annualized/seasonally-adjusted data)



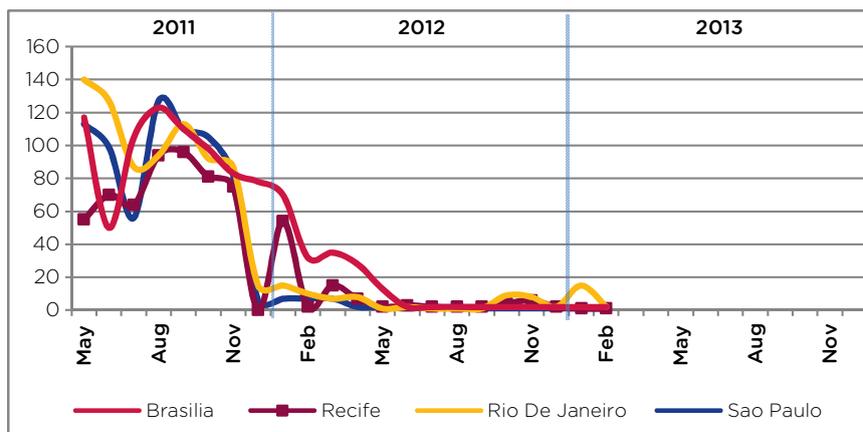
Sources: U.S. Department of Commerce, Bureau of Economic Analysis (travel employment); U.S. Department of Labor, Bureau of Labor Statistics (all industries).
Notes: Travel employment reflects annualized total travel employment (direct employment plus indirect employment). Total employment is seasonally adjusted.

ESTA Travel Promotion Fees Collected
(lhs: \$millions; rhs: % change same month previous year)



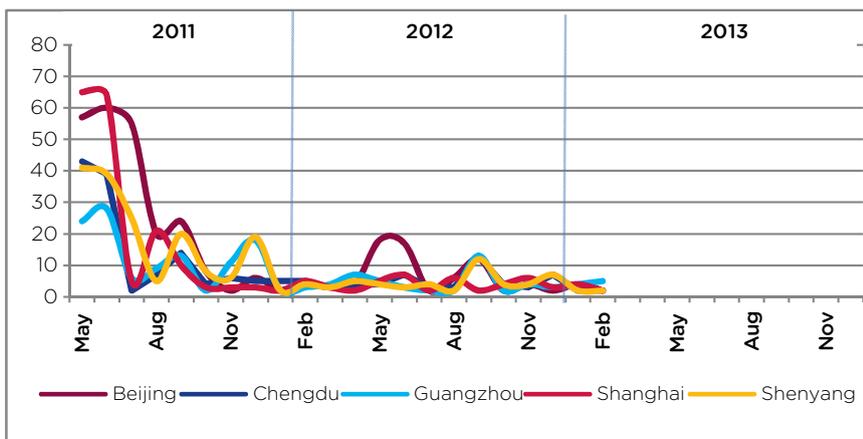
Sources: U.S. Department of Homeland Security; Customs and Border Protection.
Notes: Fees reflect the \$10 portion of the \$14 ESTA application fee per traveler for approved applications ("Adjusted Travel Promotion Classification"). Fee began in September 2010.

Visa Interview Wait Time: BRAZIL
(days)



Source: U.S. Department of State; Bureau of Consular Affairs.
Notes: Visa interview wait time refers to the typical wait time to receive an interview appointment to apply for a visa at a U.S. Embassy or Consulate.

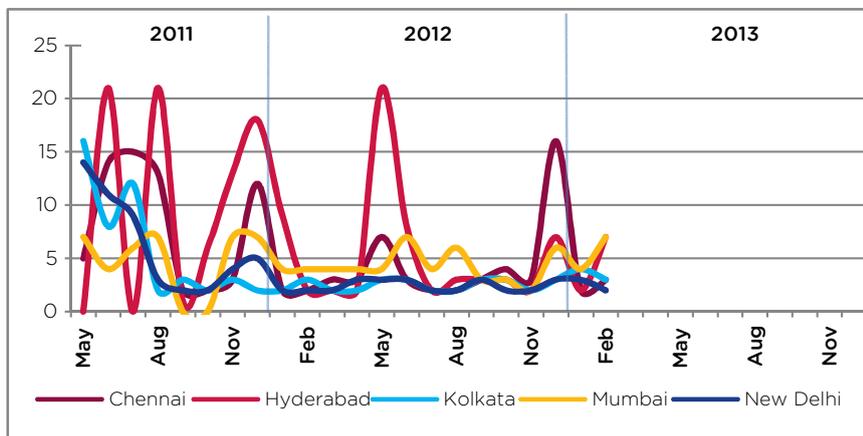
Visa Interview Wait Time: CHINA
(days)



Source: U.S. Department of State; Bureau of Consular Affairs.

Notes: Visa interview wait time refers to the typical wait time to receive an interview appointment to apply for a visa at a U.S. Embassy or Consulate.

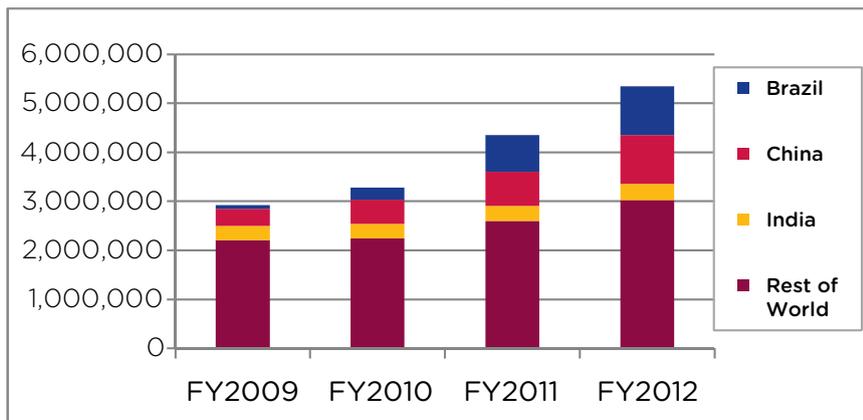
Visa Interview Wait Time: INDIA
(days)



Source: U.S. Department of State; Bureau of Consular Affairs.

Notes: Visa interview wait time refers to the typical wait time to receive an interview appointment to apply for a visa at a U.S. Embassy or Consulate.

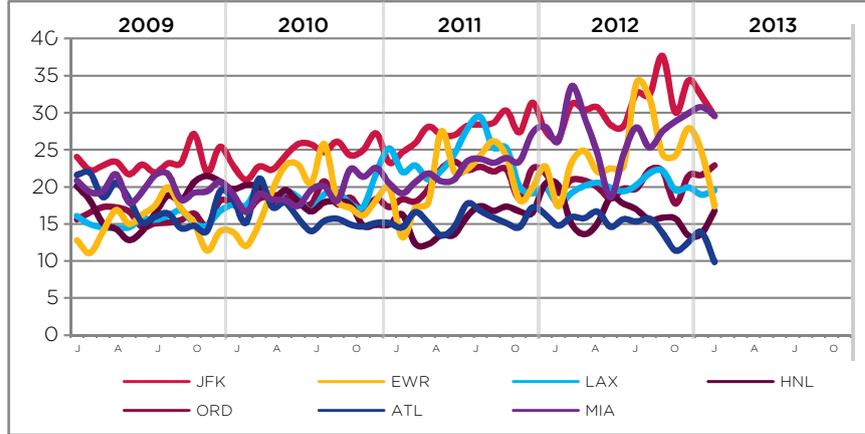
B1/B2 Short-Term Tourist and Business Travel Visas Issued
(number of B1/B2 travel visas issued in fiscal year in China, Brazil, India, and the remainder of visa-issuing posts worldwide)



Source: U.S. Department of State; Bureau of Consular Affairs.

Notes: The graph above represents the number of B1/B2 visas issued in fiscal years 2009-2011 in China, Brazil, India, and worldwide.

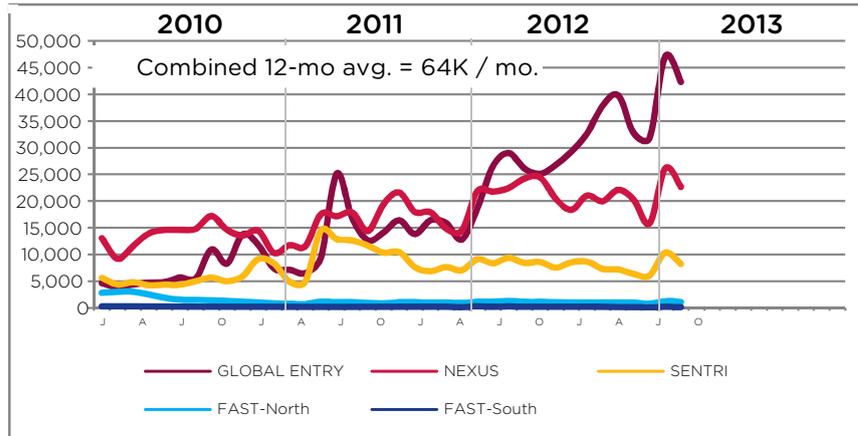
International Arrivals Processing Times by Port of Entry
(minutes)



Source: U.S. Department of Homeland Security; Customs and Border Protection.

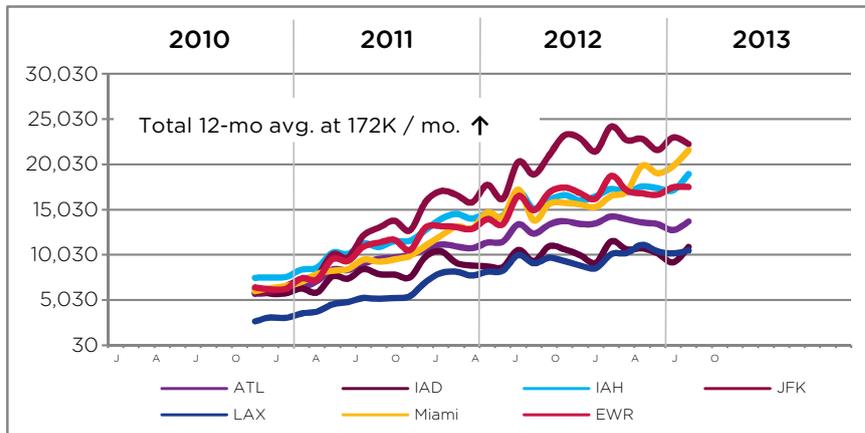
Notes: CBP recommends travelers consult the CBP website http://www.cbp.gov/xp/cgov/travel/wait_times/ for relevant information about wait times.

Trusted Traveler Programs Enrollment Applications
(number applications by month)



Source: U.S. Department of Homeland Security; Customs and Border Protection.

Trusted Traveler Program Airport Kiosk
(number of travelers using kiosk by airport)



Source: U.S. Department of Homeland Security; Customs and Border Protection.

Travel Forecast

(% change previous year)

	Total U.S.	Brazil	China	India
2010 Actual	8.7%	34%	53%	18%
2011 Actual	4.2%	26%	36%	2%
2012 Forecast	6.7%	18%	41%	12%
2013 Forecast	4.1%	14%	26%	5%
2014 Forecast	4.3%	9%	21%	5%
2015 Forecast	3.7%	9%	20%	6%
2016 Forecast	3.6%	7%	18%	6%
2017 Forecast	3.7%	7%	18%	6%

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries. (OTTI) Fall 2012 forecast.

Notes: The travel forecast is prepared semi-annually in May and October.

According to UNWTO, the U.S. remains the global leader in tourism receipts. In 2012, the U.S. widened its lead over Spain (+1 percent) and France (+2 percent) by achieving a +9 percent growth in receipts. The UNWTO described the U.S. as “the star performer” of North America, driving the majority of growth for the region. Despite the strength of U.S. tourism demand trends, Brand USA’s efforts to

Airline Capacity (available seats)

(% change previous year)

	Brazil	China	India
2012-09	7%	3%	-18%
2012-10	11%	5%	-16%
2012-11	22%	8%	-15%
2012-12	22%	12%	-15%
2013-01	23%	9%	-15%
2013-02	18%	6%	-18%
2013-03	20%	7%	-3%
2013-04	14%	6%	4%
2013-04	13%	14%	1%
2013-06	14%	11%	na
2013-07	13%	19%	na
2013-08	15%	13%	na

Source: U.S. Department of Transportation; FAA / INNOVATA, Inc. (2013-03-08)

Notes: Airline capacity reflects the planned total seat capacity airlines expect to offer in the upcoming months. Change in seat capacity is subject to normal changes in supply and demand and country-to-country air agreements.

regain lost global market share remains a critical need. Competition from both emerging and mature markets will intensify in upcoming years as new travelers create new regional demand in Asia and Latin America in particular, and European economic recovery refuels demand for short-haul international trips that had been depressed by economic volatility in recent years.

The Competition

Regaining our share of the world travel market

Despite the recent gains of the United States, our share of the world travel market remains well below pre-September 11, 2001, figures. The United States ranks second to France in terms of total international arrivals. And the United States faces new competition from emerging economies like China, Hong Kong, Malaysia, and Thailand. Competitor destination countries are spending upwards of \$150 million a year to attract more travelers and, in many cases, their budgets to promote their respective countries to international travelers have increased by as much as two-fold.

The United States has largely missed out on the global travel boom of the past few years. According to the U.S. Travel Association, the nation’s share of long-haul arrivals is still well below historic levels, having declined from 17

percent in 2000 to 12.4 percent in 2011. According to the U.S. Travel Association, other countries are seeing double and even triple the level of growth rates from Brazilian, Chinese, and Indian travelers, all of whom have spend more than most other travelers who visit the United States.

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

Top 10 Markets

Brand USA is focused on markets that supply international travelers to the United States. Throughout 2014, a strong combination of consumer marketing and trade outreach will be active in each of the top 10 markets that have the potential to generate the majority of international inbound travel and spend to the United States.

2012 International Visitation to the USA

RANK	COUNTRY	2012 ARRIVALS
1	 Canada (+6%) Canada improved its position as the leader in arrivals to the United States, setting a volume record for the third consecutive year. One-half of the 6 percent increase over 2011 was from the small one-night auto segment, which was up 35 percent for the year. Monthly jumps in this segment began in June, coinciding with an increase in the exemption limit on duty-free goods. Canada accounted for a 33.9 percent share of 2012 visitor volume.	22.70 Million
2	 Mexico (+8%) Mexico visitor volume expanded in 2012 for the third consecutive year and surpassed the 2000 record of 14.3 million. As usual from this market, monthly performance throughout the year produced no discernible patterns. Mexico accounted for a 21.5 percent share of 2012 visitor volume.	14.51 Million
3	 United Kingdom (-2%) United Kingdom visitor volume was down in 2012 for the fourth consecutive year. Visitor volume is now down nearly one million visitors from the 2000 peak of 4.7 million. Monthly moving averages all remain in negative territory, providing a bearish outlook for 2013. The U.K. accounted for a 6.1% share of 2012 visitor volume.	3.76 Million
4	 Japan (+14%) Post-tsunami optimism for a recovery in visitor volume was finally rewarded in 2012. There was a sharp increase in visitation, with the U.S. volume reaching five percentage points above the solid total outbound performance to the world (+9 percent). The 2012 visitor volume remains well below the 1997 record of 5.4 million visitors. Japan accounted for a 5.2 percent share of 2012 visitor volume.	3.70 Million
5	 Germany (+3%) Heading into the last quarter of 2012, Germany's YTD performance trend set hopes that the year might break the 2.0 million volume record set in 1996. Unfortunately, year-end negative monthly performances dashed those hopes as volume fell just short of the record. Germany accounted for a 2.9 percent share of 2012 volume.	1.88 Million
6	 Brazil (+19%) Brazil posted another double-digit growth rate in 2012. This performance extends the growth streak to nine years and resulted in a third consecutive record for arrivals. Brazil has now posted double-digit growth in 8 of the past 9 years. Brazil and Germany appear positioned to compete for the #5 spot in 2013. Brazil accounted for a 2.4 percent share of 2012 visitor volume.	1.79 Million
7	 China (+35%) China's 35 percent increase in 2012 visitor volume catapulted the country up two spots, surpassing both South Korea and France to reach 7th place in arrivals. This performance was the best in terms of percentage change among the top 30 origin markets. China accounted for a 1.7 percent share of 2012 visitor volume.	1.47 Million
8	 France (-3%) France slipped to the #8 spot as a result of a 3% decline in arrivals, coupled with China's 35 percent growth. France's 2012 performance continues the up-and-down trend seen over the past 12 years, with visitation having increased six times and decreased six times in that period. France accounted for a 2.4 percent share of 2012 visitor volume.	1.46 Million
9	 South Korea (+9%) South Korea posted a solid increase in 2012 to set a third consecutive arrivals record. Since inclusion in the Visa Waiver Program in late 2008, South Korea's annual performance has been uneven at -2 percent, +49 percent, +3 percent, and now +8 percent. South Korea accounted for a 1.8 percent share of 2012 visitor volume.	1.25 Million
10	 Australia (+8%) Australia built on steady performance and posted its eighth straight record year with 8 percent growth in 2012. The year included two months of performance declines, the first declines since June 2009. The 33 consecutive months of volume growth prior to these months is one of the longest growth strings of any origin country over the past few years. Australia accounted for a 1.7 percent share of 2012 visitor volume.	1.12 Million

Source: OTTI 2012 Overseas Visitor Profile

An important part of the equation when considering the markets where we promote travel to the United States is spend. In addition to total spend, we also consider how various markets rank in terms of spend per traveler.

2012 International Visitor Spending in the USA

RANK	COUNTRY	2012 SPENDING
1	 Canada (+6%) In 2012 visitors from Canada opened their wallets wider than ever before, injecting a record-breaking \$25.5 billion in the U.S. economy. In fact, following the full implementation of the Western Hemisphere Travel Initiative in 2009, visitors from Canada have set spending records in every subsequent year! Travel and tourism exports account for 42 percent of all U.S. services exports to Canada.	\$25.5 Billion (\$1,123 per traveler)
2	 Japan (+13%) U.S. travel and tourism-related exports to Japan have been fraught with difficulties—SARS in 2003, the economic slowdown of 2009, and nuclear emergencies in 2011. In 1995 international visitors from Japan spent an estimated \$17.8 billion in the United States, nearly \$1.3 billion more (7 percent) than was spent in 2012. Travel and tourism exports account for 35 percent of all U.S. services exports to Japan.	\$16.5 Billion (\$4,460 per traveler)
3	 United Kingdom (+6%) Devastated by the global economic slowdown, U.S. travel and tourism exports to the United Kingdom plummeted by nearly a third (32 percent) in 2009 and have been slow to recover. Indeed, annual visitor spending by U.K. residents is down nearly \$4.1 billion when compared to 2008, but is once again on the rise. Travel and tourism exports account for 22 percent of all U.S. services exports to the United Kingdom.	\$12.6 Billion (\$3,351 per traveler)
4	 Mexico (+8%) In 2012 visitors from Mexico spent a record-breaking \$10.0 billion in the United States, an increase of 8 percent when compared to 2011. After falling 17 percent in 2009, U.S. travel and tourism exports to Mexico have risen 8 percent, 6 percent, and 8 percent in 2010, 2011, and 2012, respectively. Travel and tourism exports account for 36 percent of all U.S. services exports to Mexico.	\$10.0 Billion (\$689 per traveler)
5	 Brazil (+11%) 2012 marks the ninth consecutive year of double-digit growth in visitor spending and the fifth consecutive year of record-breaking visitor spending in the United States. Even during the global economic slowdown of 2009, Brazil broke the previous year's record. Travel and tourism exports account for 39 percent of all U.S. services exports to Brazil.	\$9.3 Billion (\$5,196 per traveler)
6	 China (+14%) In 2008 China wasn't even on the Top 10 radar. Now, however, after stringing three consecutive years of strong double-digit growth (47 percent, 47 percent, and 14 percent in 2010, 2011, 2012, respectively), China firmly commands sixth place after spending a record-breaking \$8.8 billion in the United States in 2012. Travel and tourism exports account for 29 percent of all U.S. services exports to China.	\$8.8 Billion (\$5,986 per traveler)
7	 Germany (+10%) Back-to-back years of double-digit growth of U.S. travel and tourism exports to Germany pushed their annual spending in the United States up to an all-time record of \$6.9 billion in 2012, an increase of 10 percent. Germany maintained their seventh place ranking in 2012 after being supplanted by China in 2011 when the country ranked sixth. Travel and tourism exports account for 26 percent of all U.S. services exports to Germany.	\$6.9 Billion (\$3,670 per traveler)
8	 Australia (+10%) Visitors from Australia have spent record levels on U.S. travel and tourism goods and services in eight out of the last 10 years, helping to propel Australia up in the rankings to our eighth largest market abroad in 2012; in fact, visitors from Australia spent a record-breaking \$5.4 billion in 2012, an increase of 10 percent when compared to 2011. Travel and tourism exports account for 31 percent of all U.S. services exports to Australia.	\$5.4 Billion (\$4,821 per traveler)
9	 France (+7%) Despite spending more than ever before in 2012, France fell from eighth to ninth in terms of total spending in the United States as a result of slower growth than that of Australia (7 percent vs. 10 percent, respectively). Nonetheless, 2012 marks the second consecutive year in which visitors from France spent more than ever before in the United States. Travel and tourism exports account for 28 percent of all U.S. services exports to France.	\$5.3 Billion (\$3,630 per traveler)
10	 India (+10%) Outspending visitors from Italy by a full \$1 billion secured India's position in the top 10. However, since 2008 India has fallen from seventh to tenth in terms of total spending in the United States (but not because travelers from India aren't spending). Indeed, spending by visitors from India was a record-setting \$4.9 billion in 2012 and has exhibited double-digit growth rates in seven of the last 10 years. Travel and tourism exports account for 40 percent of all U.S. services exports to India.	\$4.9 Billion (\$6,768 per traveler)

Source: OTTI 2012 Overseas Visitor Profile

The U.S. destinations international travelers visit in the United States are still mainly the traditional ones and are based on where the majority of international flights arrive. Brand USA has brokered extensive partnerships with these states and territories to leverage international consumer interest and maximize value to our partners, and is developing initiatives to promote U.S. destinations that are beyond these gateways.

Overseas⁽¹⁾ Visitors To Select U.S. Cities: 2011-2012

2012 Rank	Destination ⁽²⁾⁽³⁾ (City)	2011 Market Share	2011 Visitation (000)	2012 Market Share	2012 Visitation (000)	Volume Change (%)
1	New York City	33.3	9,285	30.6	9,107	-2%
2	Miami	10.6	2,956	11.7	3,482	18%
3	Los Angeles-Long Beach	13.1	3,653	11.4	3,393	-7%
4	Orlando	10.0	2,788	10.7	3,184	14%
5	San Francisco	10.3	2,872	9.4	2,798	-3%
6	Las Vegas	10.0	2,788	9.1	2,708	-3%
7	Honolulu	6.4	1,785	7.5	2,232	25%
8	Washington, DC	6.5	1,812	5.9	1,756	-3%
9	Chicago	4.3	1,199	4.6	1,369	14%
10	Boston	4.7	1,311	4.2	1,250	-5%
11	San Diego	2.7	753	2.6	774	3%
12	Atlanta	2.1	586	2.2	655	12%
12	Houston	2.1	586	2.2	655	12%
14	Philadelphia	2.2	613	2.0	595	-3%
15	Flagstaff-Grand Cyn-Sedona	2.1	586	1.8	536	-9%
16	Ft. Lauderdale	**	**	1.7	506	n.a.
17	Anaheim-Santa Ana	1.3	362	1.6	476	31%
18	Tampa-St. Petersburg	**	**	1.4	417	n.a.
18	Dallas-Plano-Irving	1.5	418	1.4	417	0%
18	San Jose	1.3	362	1.4	417	15%
18	Seattle	1.7	474	1.4	417	-12%
22	Buffalo-Niagara Falls	1.2	335	1.0	298	-11%
23	Denver	1.0	279	**	**	n.a.

¹Excludes Canada and Mexico.

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

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

n.a. = Estimate not available.

Note: This table shows only one of the 37 travel characteristics data reported on international arrivals to the U.S.

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

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries

Release Date: August 2013

Overseas⁽¹⁾ Visitors To Select U.S. States and Territories: 2010-2011

2012 Rank	Destination ⁽²⁾ (State/Territory)	2010 Market Share	2010 Visitation (000)	2011 Market Share	2011 Visitation (000)	Volume Change (%)
1	New York	34.1	9,508	31.3	9,315	-2%
2	Florida	20.4	5,688	22.1	6,577	16%
3	California	22.0	6,134	20.2	6,012	-2%
4	Hawaiian Islands	8.2	2,286	9.5	2,827	24%
5	Nevada	10.3	2,872	9.3	2,768	-4%
6	Illinois	4.5	1,255	4.7	1,399	11%
6	Guam	4.4	1,227	4.7	1,399	14%
8	Massachusetts	5.1	1,422	4.5	1,339	-6%
8	Texas	4.6	1,283	4.5	1,339	4%
10	Pennsylvania	3.3	920	3.2	952	4%
11	New Jersey	3.5	976	2.9	863	-12%
12	Arizona	3.1	864	2.7	804	-7%
13	Georgia	2.4	669	2.5	744	11%
14	Utah	1.8	502	1.6	476	-5%
15	Colorado	1.6	446	1.5	446	0%
15	Washington	1.8	502	1.5	446	-11%
17	North Carolina	1.2	335	1.3	387	16%
17	Virginia	1.3	362	1.3	387	7%
19	Ohio	1.0	279	1.2	357	28%
20	Maryland	1.2	335	1.0	298	-11%
20	Louisiana	**	**	1.0	298	n.a.
22	Connecticut	1.1	307	0.9	268	-13%

¹Excludes Canada and Mexico.

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

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

n.a. = Estimate not available.

Note: This table shows only one of the 37 travel characteristics data reported on international arrivals to the U.S.

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Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries

Release Date: August 2013

Overseas Travelers Characteristics: 2011

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

*Multiple Response

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI) 2011 Overseas Visitor Profile

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

*Multiple Response

**Maximum number is seven

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

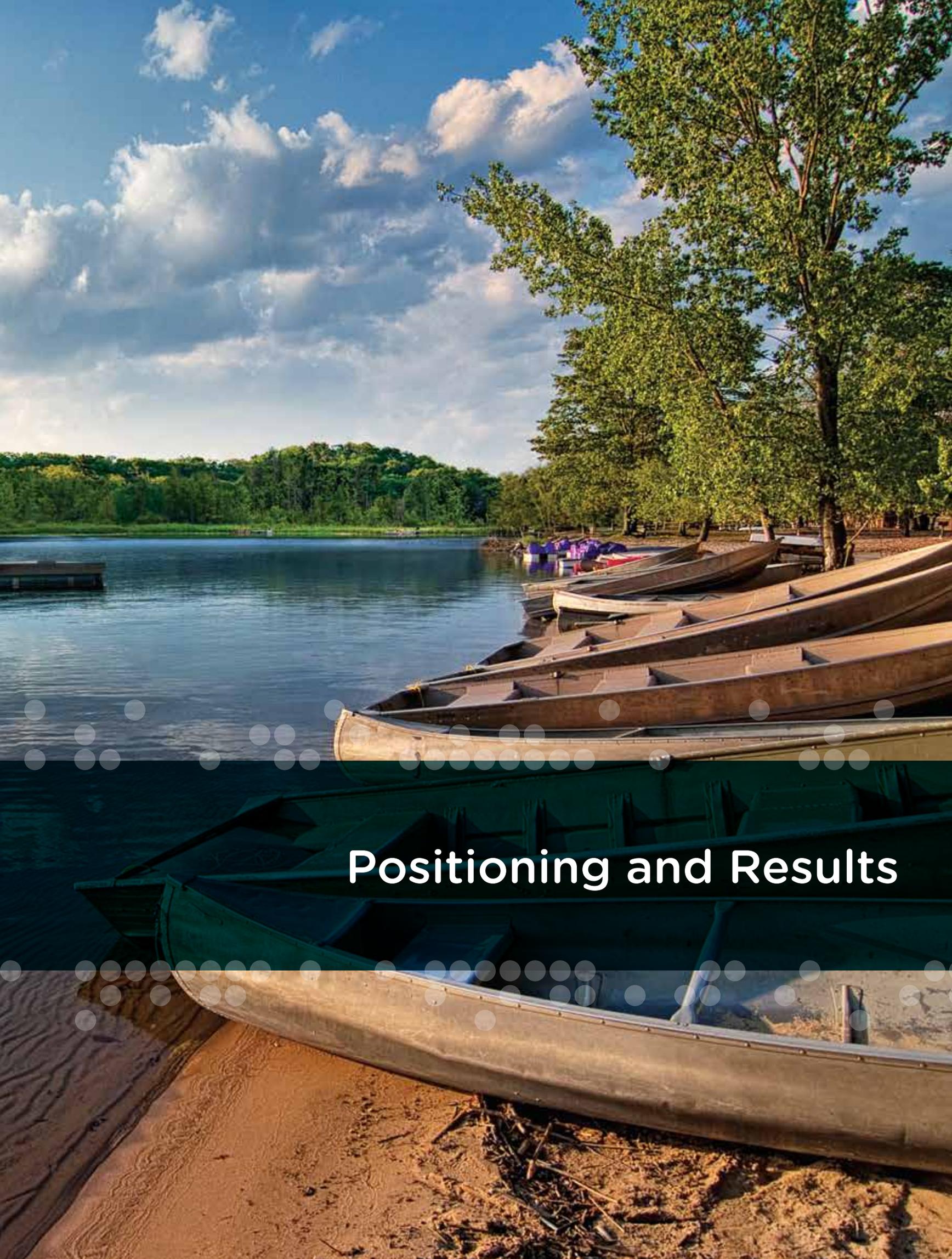
Source: U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI) 2011 Overseas Visitor Profile

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

*Multiple Response

**Maximum number is seven

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI) 2011 Overseas Visitor Profile



Positioning and Results

USA

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

There was a time when Times Square and The Grand Canyon were enticing enough to attract tourists world-wide. But tighter airline security, two wars, and increasing interest in “newer” destinations led to the first-ever decline in U.S. tourism.

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

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

But, how does one sell to the world?

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

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

The Situation

America — no longer the world’s darling

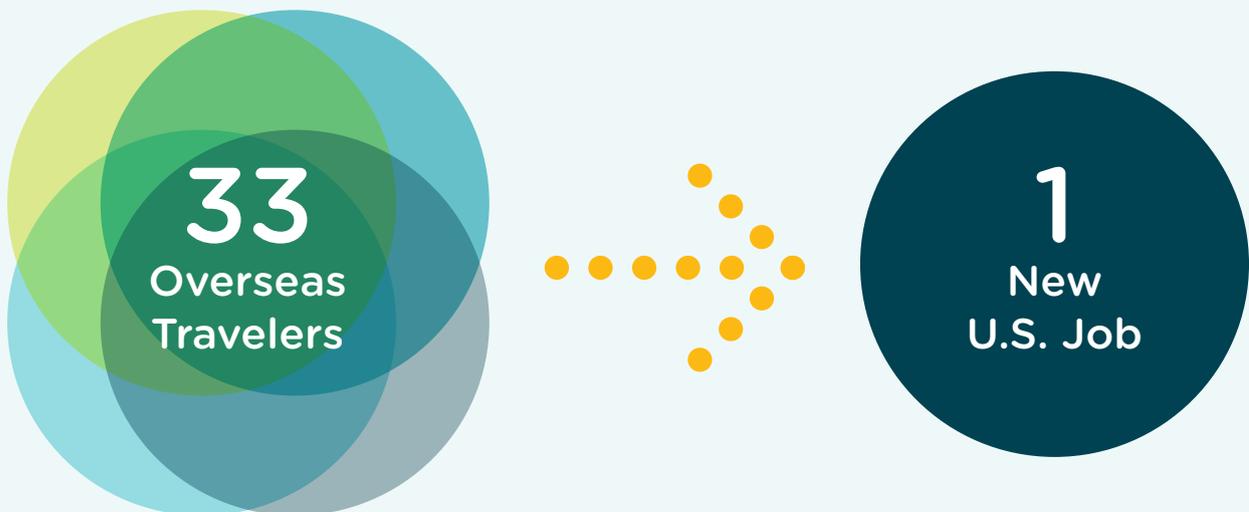
There was a time when the USA was considered the world’s beacon, a place that held a dream for all. But complicated entry procedures, unpopular politics, and the emergence of newer, hipper travel destinations conspired to lure tourists elsewhere. **Our share of the booming global tourism market had declined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

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

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

A CHANCE TO REVERSE THE DECLINE

In 2010, with the launch of the Travel Promotion Act, the United States officially recognized tourism as an opportunity to jump-start the economy and create needed jobs. **Every 33 new overseas tourists would create 1 new domestic job.**



The Challenge

How do you sell a place as big as America?

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

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

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

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

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

But first we needed to understand the barriers to visit.

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

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

AMERICA IS UNWELCOMING

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

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

AMERICA IS TOO FAMILIAR

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

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

AMERICA IS BRASH AND ARROGANT

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

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

THERE ARE NEWER, COOLER PLACES

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

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

AMERICA IS NOW MIDDLE-AGED

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

"It's the shabby new world." — UK

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

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

Finding the sparks to reignite the flame

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

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

Their sentiments fell into four central themes:

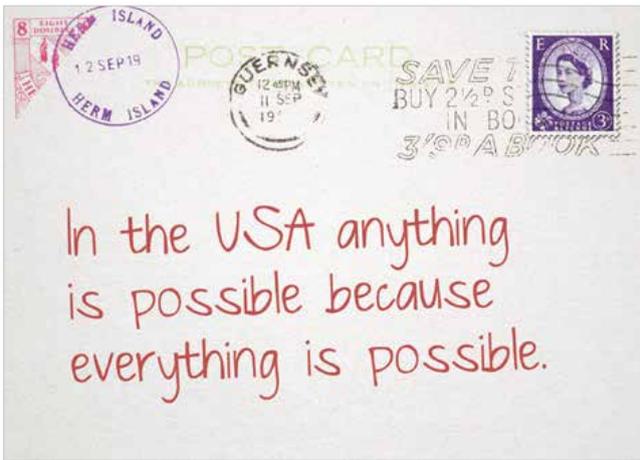
FREEDOM



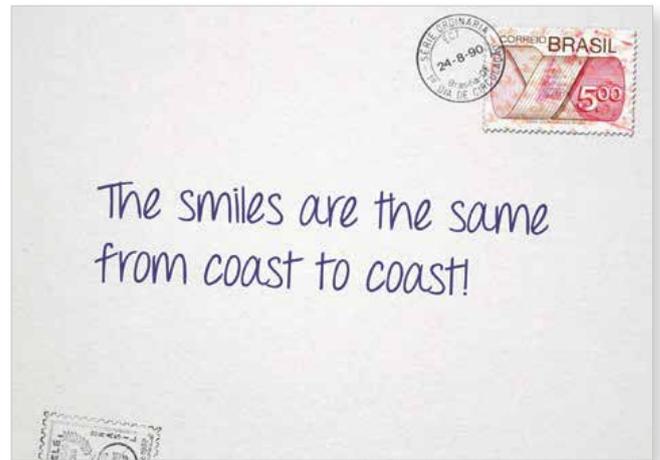
DIVERSITY OF PEOPLE & EXPERIENCES



BOUNDLESS POSSIBILITIES



WELCOMING TO ALL



The “Aha” Moment

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

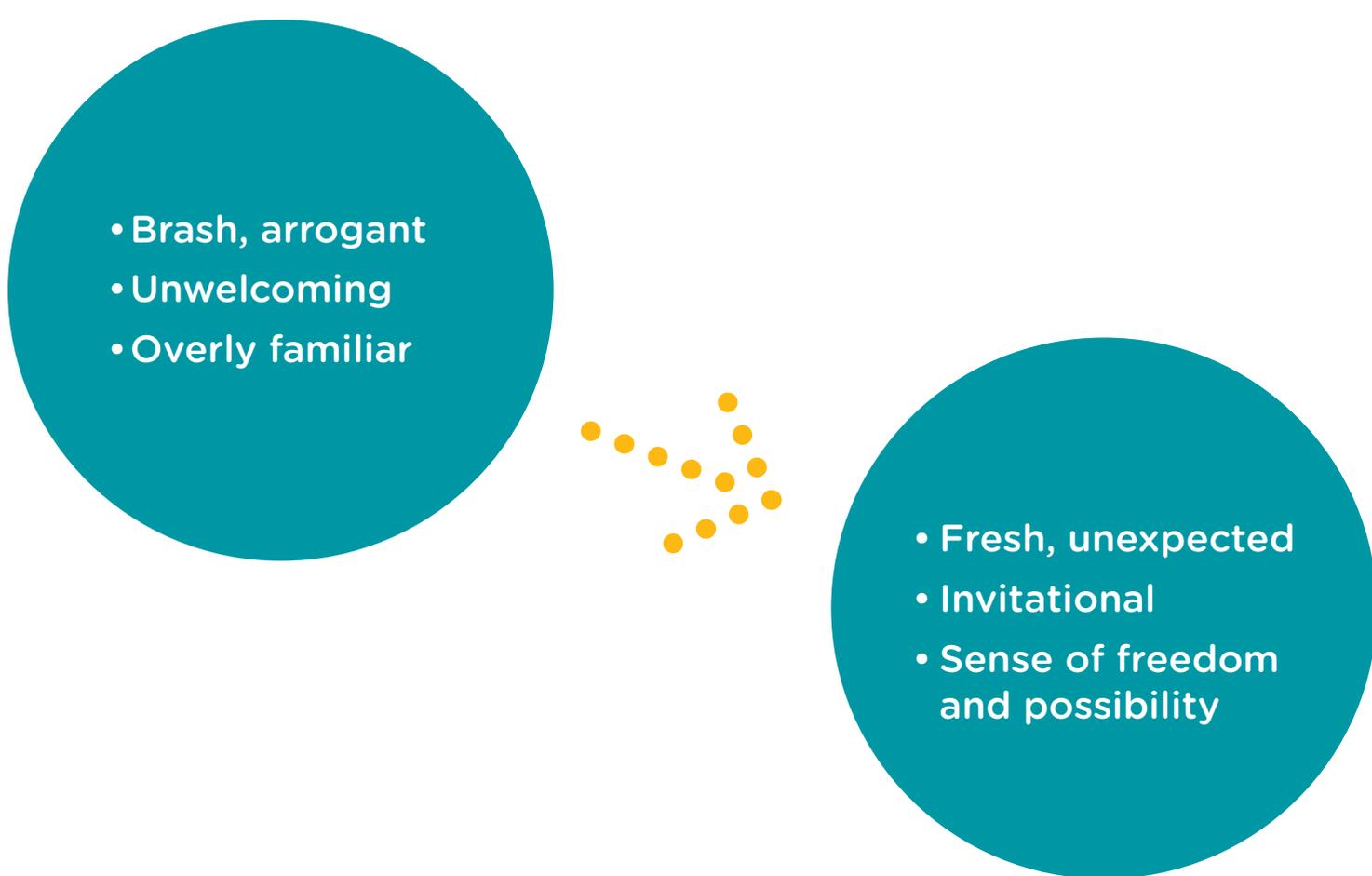
We had uncovered an embarrassment of riches — and landed right on top of our insight. We learned that what people love best about America, even more than the destination itself, are the very ideals the country was founded on: freedom, diversity and unbounded possibilities.

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

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

The Creative Task

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

- 
- Brash, arrogant
 - Unwelcoming
 - Overly familiar

- Fresh, unexpected
- Invitational
- Sense of freedom and possibility

A STRATEGY TO BRIDGE THE GAP

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

Brand Strategy

“The United States of Awesome Possibilities Welcomes Everyone”

Starting with a Visual Identity System

Beyond the red, white and blue

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

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



DiscoverAmerica.com



DiscoverAmerica.com



DiscoverAmerica.com



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DiscoverAmerica.com



DiscoverAmerica.com

The Campaign

Communicating to an audience as big as the world

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

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

We reached out to Grammy Award winner, Rosanne Cash, daughter of American music icon Johnny Cash, to turn our insights into an original song that would invite the world to come experience America. While the song

is distinctly "Americana" in tone, the welcome becomes universal as musicians from around the world unite with Rosanne in song.

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

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

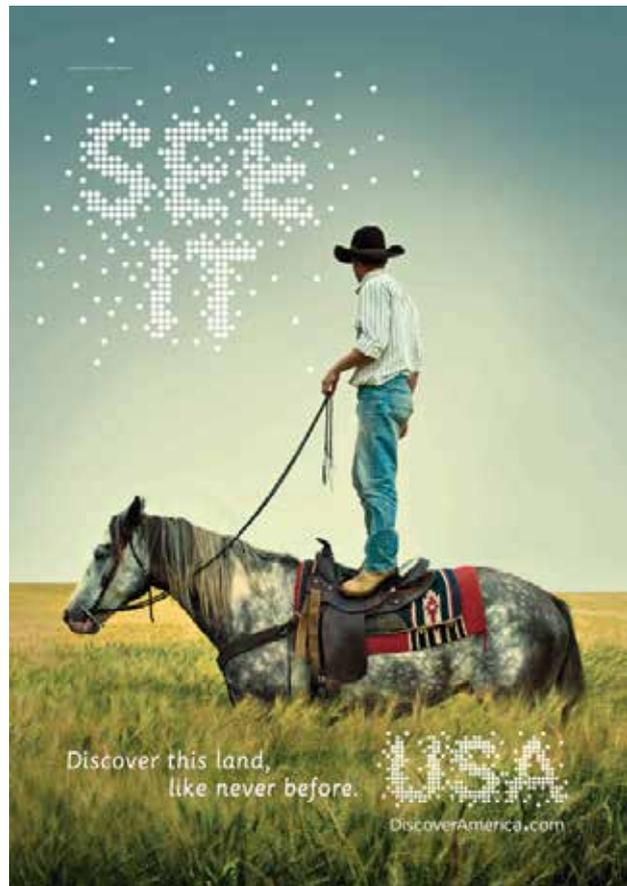
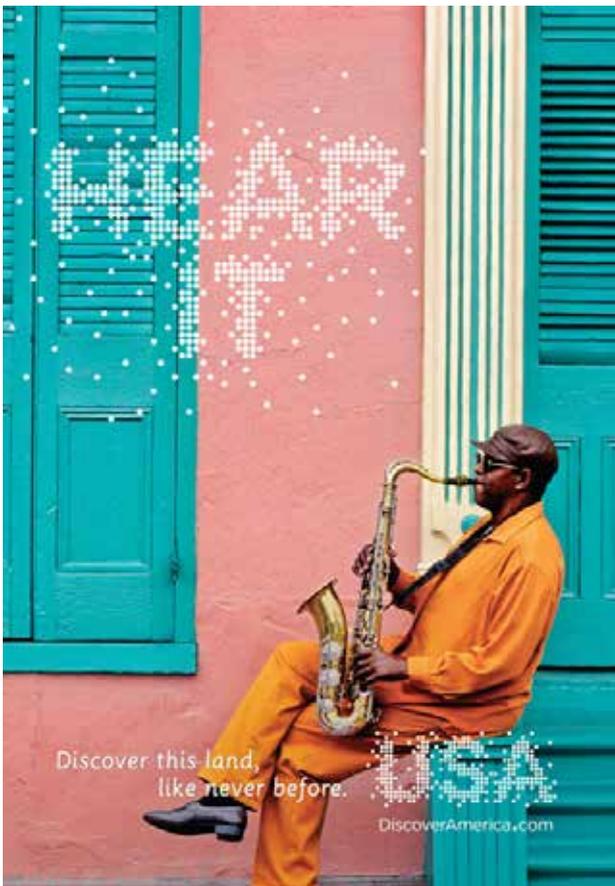
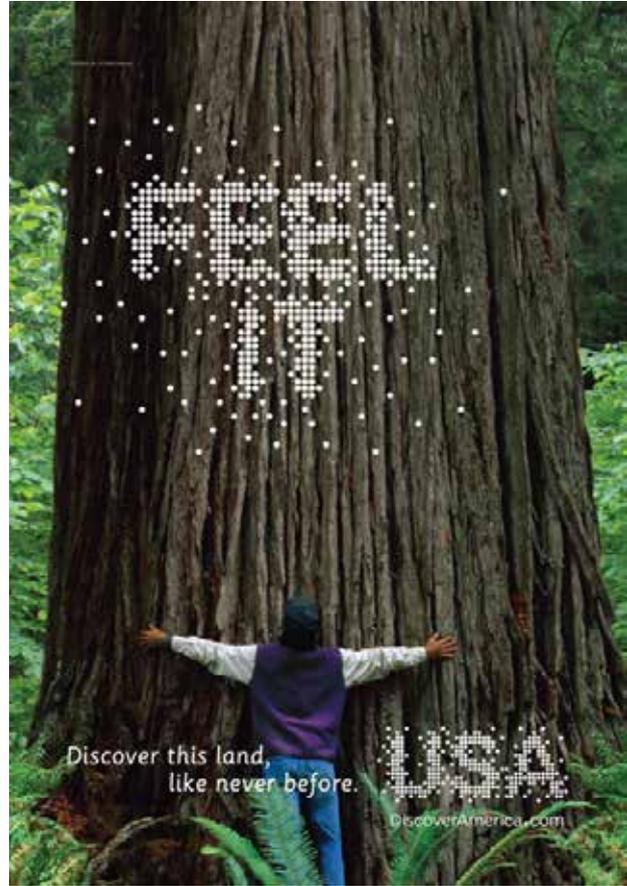
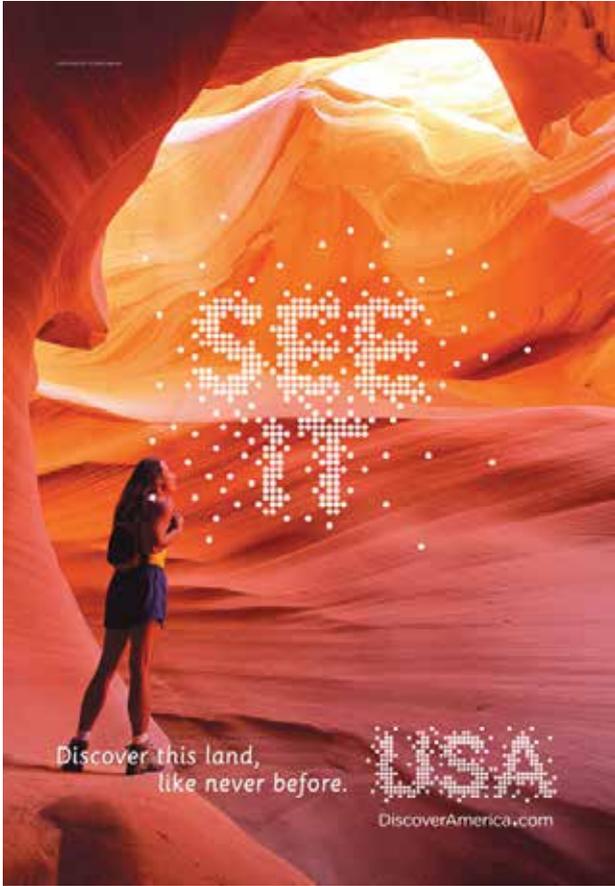


www.youtube.com/YourDiscoverAmerica



Print and Out of Home (OOH)

Print and OOH campaign elements arouse the senses and convey personal and experiential possibilities.



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



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



Results

The Land of Dreams social media campaign has engaged millions of people around the world. And the momentum is growing as we continue to expand our social media presence on channels such as Twitter, Facebook, Instagram, and YouTube. Today, we are engaging more travelers than ever—capturing their imagination and sparking the desire to discover the USA in new and unexpected ways.



Facebook



Engagement Rate



Land of Dreams



Time Spend with DiscoverAmerica.com Content



Website Visits in 2013 So Far



Website Visits Since Launch



YouTube



People Reached Each Month in 2013



The social media response has been overwhelmingly positive.

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

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

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

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

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

The industry has taken notice.

THE GLOBE AND MAIL

Special section: U.S. tourism campaign puts Canada on back foot

The United States is putting out the multicultural welcome mat in its first national effort to sell itself to the world since the Reagan administration. And it's scaring the daylight out of the tourism industry in Canada... "The giant has awoken... They're the best marketers on the planet, and they're putting their shoulder into it."

—David Goldstein, president and chief executive officer of the Tourism Industry Association of Canada.

And it's scaring the daylight out of the tourism industry in Canada... a key target of the reboots... "The giant has awoken... They're the best marketers on the planet, and they're putting their shoulder into it."

Inaugural Campaign Results

Tracking proves the perceptual shift is underway!*

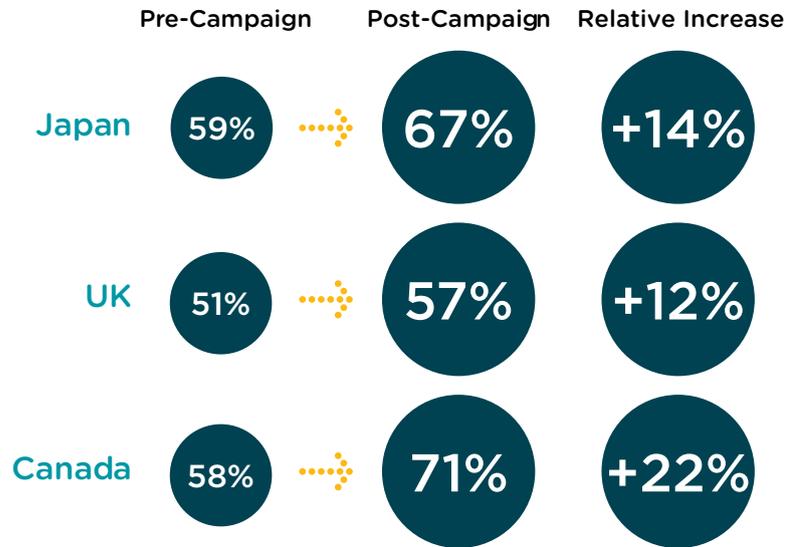
The Land of Dreams campaign kicked off strong from the beginning with results that continue to grow.

BRAND USA IMAGE ATTRIBUTES (UK)
Destination on its way up



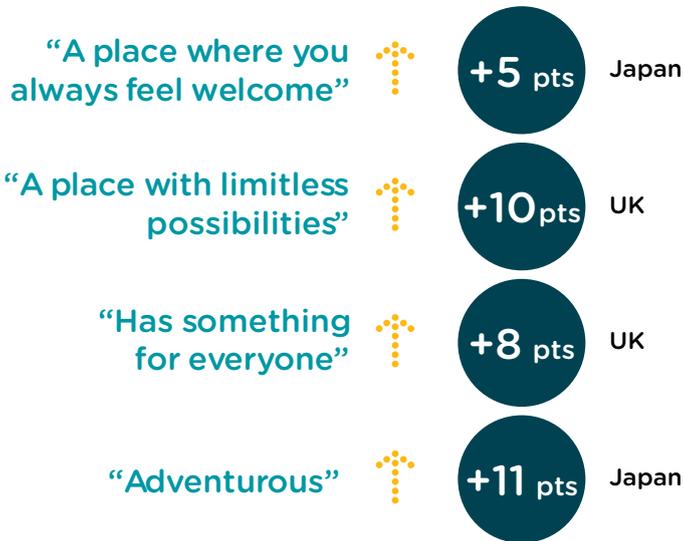
* Initial six-week tracking study

Intent to visit the USA is up since campaign launch in core markets:



Brand USA Image Attributes

Post- vs. Pre- Launch



Brand USA Image Attributes

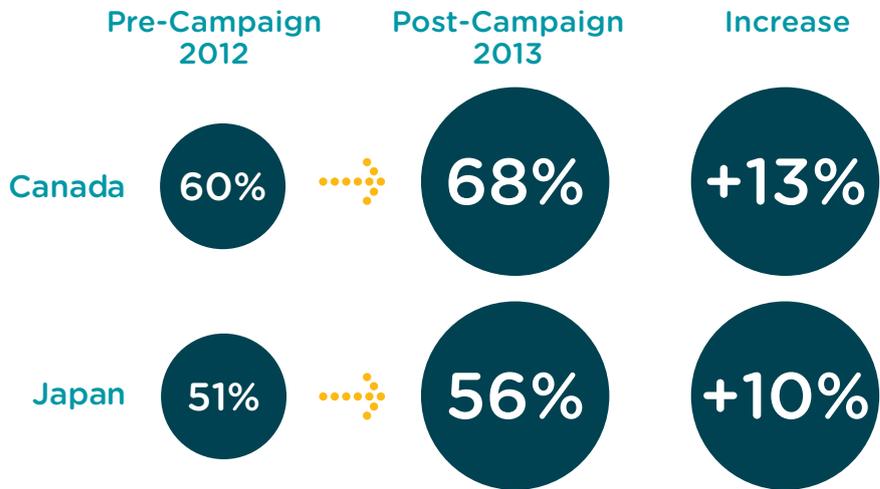
Post- vs. Pre- Launch



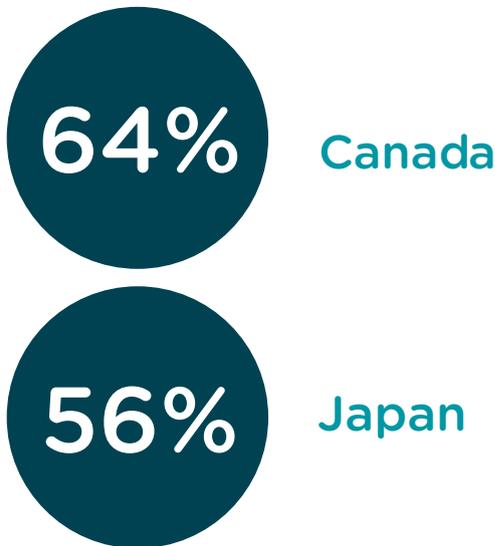
2013 Preliminary Campaign Results

Following a second year of running the highly successful “Land of Dreams” campaign, the results continue to demonstrate success, with preliminary results such as these:

“The USA is the only place I would consider” or “The USA is a place I would always consider”



“The USA campaign is much more/more appealing than other destination advertising”

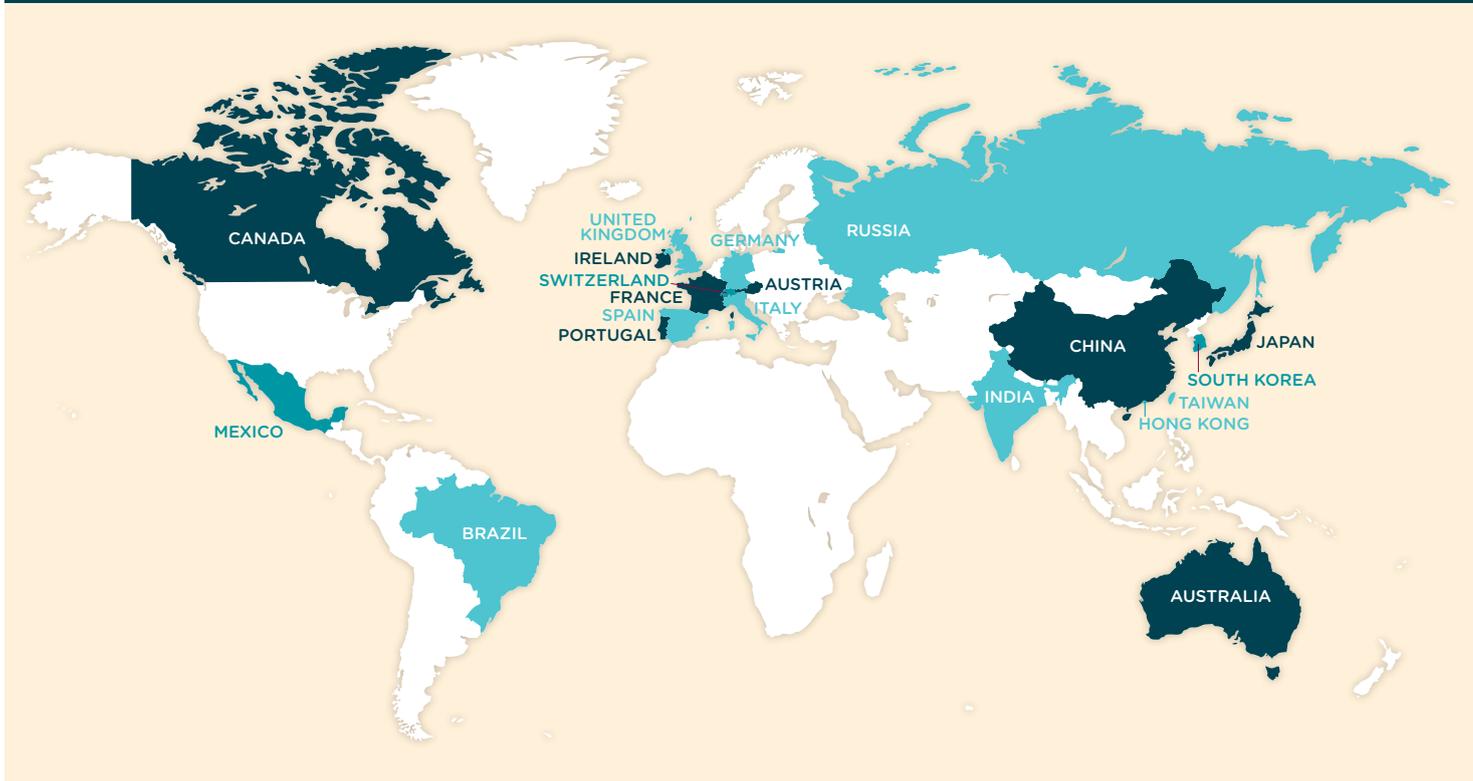


Campaign Recognition



HIGHLIGHTS BY DEPARTMENT

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



Consumer Marketing

- Launched fully integrated consumer campaign comprised of television, print, out of home, digital, search, and social media marketing in Brazil, Canada, Japan, Mexico and the United Kingdom during 2012.
 - Achieved above average campaign awareness in launch markets (averaging 25 percent)
 - Drove noteworthy positive shifts in perceptions of the United States as a travel destination
 - Significantly increased intent to visit in launch markets¹
 - Canada up 22 percent
 - Japan up 14 percent
 - United Kingdom up 12 percent
- Launched DiscoverAmerica.com in seven different languages, including custom websites in China and Taiwan.
- Expanded consumer campaign to 10 markets in 2013 that represent 75 percent of inbound travel to the United States. Every 1 percent increase in travel from these markets generates 500,000 more visitors, \$1 billion in visitor spend, and creates 14,000 new U.S. jobs.
- Expanded international social media strategy with strong engagement and positive sentiment, supported by country-specific social media campaigns in Australia, Brazil, Canada, China, Germany, Japan, Mexico, South Korea, and the United Kingdom.
- Further developed a variety of value-driven partnership marketing programs ranging from Publisher Programs to Media Planning & Buying to various Co-Op Opportunities.
- Established inaugural entertainment partner marketing program with Cirque du Soleil and sports marketing programs with World Baseball Classic, the National Basketball Association, Major League Baseball, the National Football League, and ESPN, which include broadcast and digital media plus custom content.
- Established direct relationships with global media companies such as; theTravel Channel, National Geographic, The Guardian, and the BBC

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

Research & Analytics

- Hired Vice President, Research and Analytics
- Created a comprehensive, balanced plan for metrics and analysis to track performance across Brand USA initiatives and functions
- Launched consumer market intelligence program targeting 10 key markets
- Designed and executed new ad tracking study
- Established in-market testing procedures for decision support
- Built new partnerships with research and intelligence providers, who contributed research valued at more than \$500,000
- Designed cooperative research program (to be executed in 2014)

Global Partner Development

BRAND USA HAS ESTABLISHED REPRESENTATION IN THE FOLLOWING INTERNATIONAL MARKETS



- Established relationships with more than 300 travel brands and destinations representing all industry sectors
- Increased the number of partners who have made cash contributions to Brand USA from 28 to 100
- Added 31 Founding and Premier partners
- Created partnership activity with 88 percent of targeted travel industry brands, DMOs and CVBs in FY2012
- Published a comprehensive menu of Brand USA partnership opportunities
- Significantly expanded and re-invigorated the United States' participation at key international tradeshows by creating strong umbrella branding and expanding the USA Pavilion footprint and quality of the USA's exhibitor presence—providing value-add opportunities for destinations and travel brands not previously able to participate
- Hosted 24 USA Pavilions at international trade shows around the world, included the first-ever USA Pavilion in Russia, Brazil, Dubai and Singapore
- Established international representation and opened offices in markets that generate approximately 85 percent of international in-bound travel to the United States
- Initiated travel trade outreach to tour operators in 20 international markets (including Australia, Austria, Brazil, Canada, China, France, Germany, India, Ireland, Italy, Japan, Mexico, Portugal, Russia, South Korea, Spain, Switzerland, Taiwan, and the United Kingdom)
- Launched the Tourism Exchange Year with the Japan Association of Travel Agents (JATA), in Japan and completed industry sales mission in India
- Hosted the United States' first-ever mega-familiarization trip, which included 93 leading travel agents on seven itineraries with participation from destination marketing organizations representing 51 cities, four regional associations and 12 states

Communications and Public Policy

- Established a coordinated framework through the Tourism Policy Council to collaborate with the National Travel and Tourism Strategy.
- Leveraged State Department and United States, Foreign Commercial Service (USFCS) channels to display Brand USA video and collateral at embassies, consulates, public events, and high-level meetings
- Increased the frequency and quality of content for stakeholder communications. Made several appearances and presentations at high profile industry conferences and forums, including more than 30 state and national tourism conferences
- Held regular meetings of the Public Affairs Working Group comprised of key industry and association stakeholders in order to remain up to date on public policy issues
- Held dozens of informational update meetings with key legislative stakeholders
- Established scorecard to better evaluate Brand USA's participation at industry events
- Developed innovative travel trade and international media networks powered by TravTrade and TravMedia to support partner engagement with influential travel agents, tour operators, and international journalists
- Garnered expansive and positive media coverage across all markets (trade, consumer, and business press) in key international, national, regional, and local news outlets --with coverage of all 50 states, the District of Columbia, and the five U.S. territories
- Maintained up to date information on DiscoverAmerica.com (now in seven languages and over three million visitors)
- Distributed inspirational visitor guide in print and digital to international trade and consumers
- Trade show exhibitor brochures (pre-show educational brochure)
- Promoted and increased Global Entry enrollments and communicated U.S. entry policy during World Baseball Classic events
- Provided platform for U.S. government officials to address international and domestic industry at IPW
- Worked with the Tourism Policy Council (TPC) Ease of Travel Working Group to communicate visa and entry policy promoting Trusted Traveler Programs.
- Developed communications toolkit for the United States Foreign Commercial Service (USFCS) for USFCS and Public Affairs-led travel and tourism teams
- Worked with USFCS in-market to distribute RFIs for Brand USA international representation
- Supported embassy events such as July 4 celebrations in the following markets:
 - Germany
 - United Kingdom
 - Ireland
 - China
 - Australia
 - Japan
 - South Korea
- Collaborated with USFCS at several key travel trade shows around the world (certified trade shows with USFCS booth in USA Pavilion, Ambassador Murphy keynoting ITB agenda, etc.)
- Worked with Federal/land water agencies to integrate all equities into Brand USA social media editorial/content calendar
- Developed great outdoors strategy with recreation.gov
- Collaborated with recreation.gov to highlight Federal content that fits with Brand USA thematic calendar and to identify in advance items for cross-promotion
- Held mutual briefings on activities: Brand USA approach to metrics and TPC Research Working Group inventory and gap analysis

And This Is Just the Beginning...

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



FY14 Business Plan

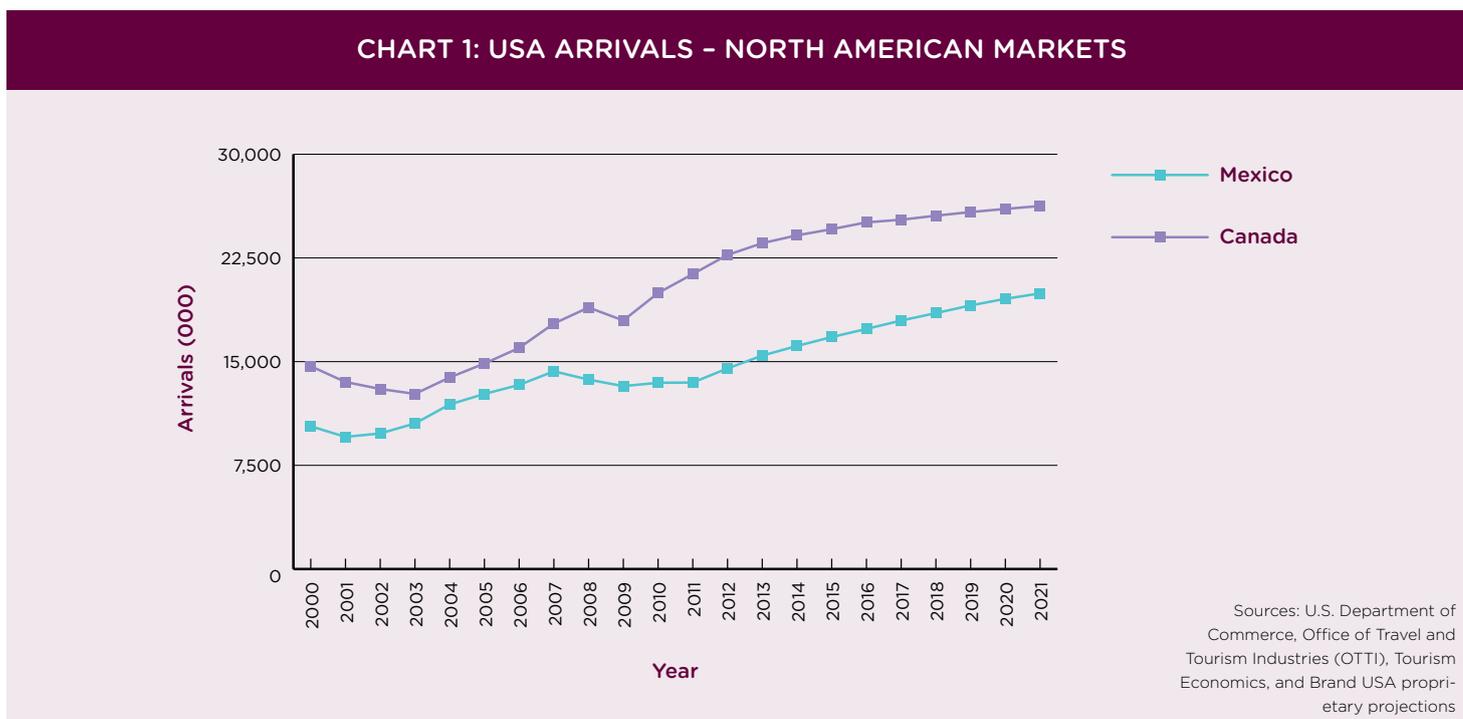
KEY LEARNINGS & IMPLICATIONS

The Path to 100 Million Visitors

To achieve the goal stated in the National Travel and Tourism Strategy to welcome 100 million annual visitors to the United States by 2021, visitor volume will have to grow by 4.6 percent each year. While this percentage does not seem particularly aggressive, 100 million visitors reflect a 49 percent increase over 2012 results. With economic challenges continuing to plague Europe, an historically key source region, it is even more important that Brand USA diversifies source markets and inspires new travelers around the world.

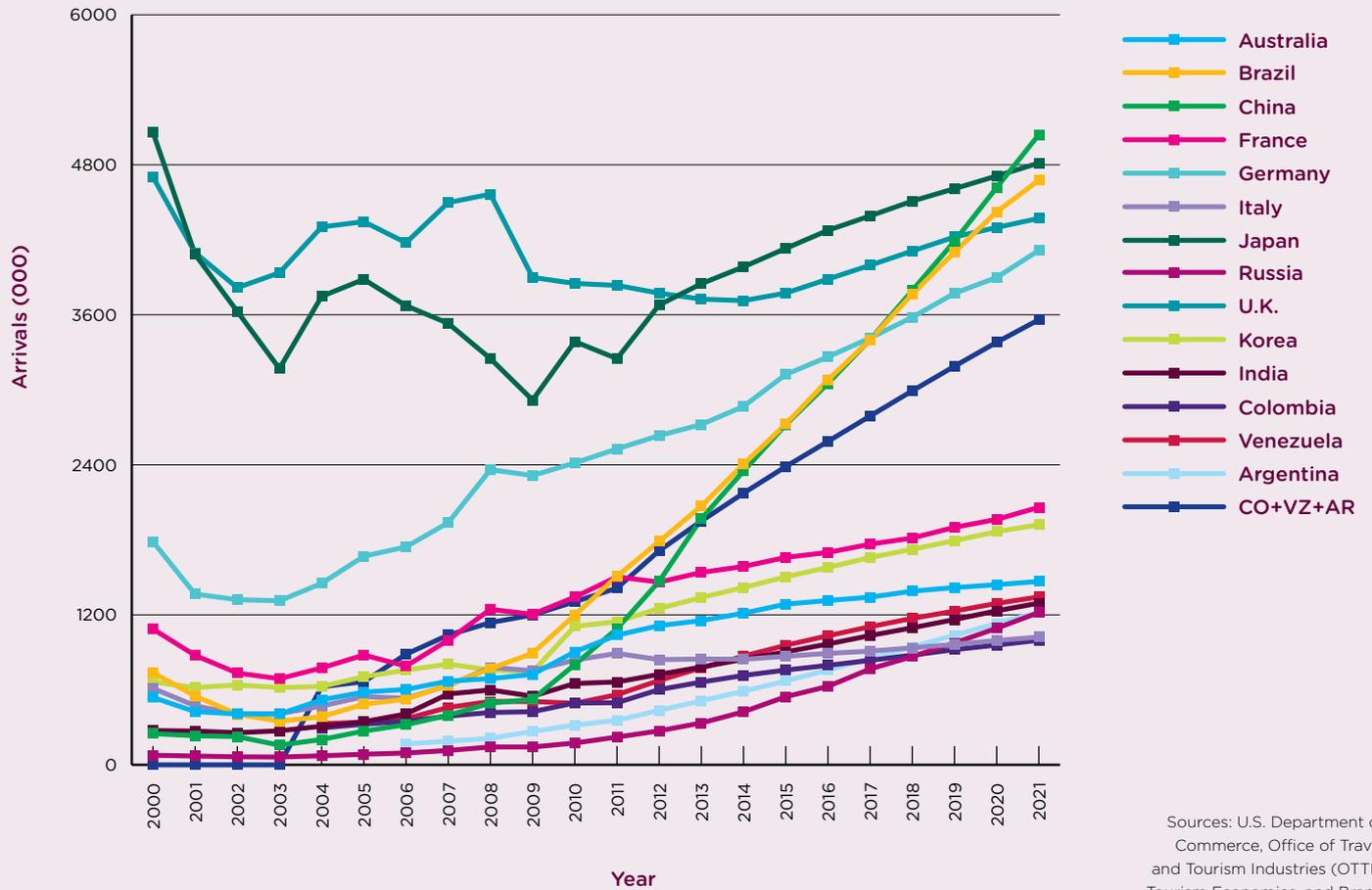
Based on the factors included as part of Brand USA's market selection model, we have plotted our path to 100 million travelers across key markets. Using these projections as a guide, our marketing efforts will be allocated to best balance short and long term growth objectives.

Chart 1 depicts the arrivals trends for Canada and Mexico and Chart 2 displays the trends for key long haul markets. Together these markets represent over 80 percent of USA visitors.



KEY LEARNINGS	IMPLICATIONS
<ul style="list-style-type: none"> Though Canada is by far the largest source market for USA arrivals, the market share is so strong that the growth of recent years is not sustainable long term. 	<ul style="list-style-type: none"> Canada's ROI for marketing is strong for individual domestic destinations. However, due to Canada's proximity and market maturity, domestic destinations often compete against one another rather than other destination countries (e.g., USA vs. USA rather than USA vs. France). The U.K. presents a similar challenge. Brand USA must work with partners to ensure cooperative funds are used to target incremental visitors to the USA overall.
<ul style="list-style-type: none"> Though the U.K. remains one of top source markets, its growth has recently been depressed by macroeconomic headwinds as well as severe taxation of outbound flights (ADP) of approximately \$100-\$125 per person. 	<ul style="list-style-type: none"> Though Brand USA has set growth targets for a rebound in the U.K., this recovery will not be easy to achieve. Despite successful campaigns that have demonstrated improved desire to visit the USA, broader market conditions are not conducive to growth.

CHART 2: USA ARRIVALS - KEY LONG HAUL MARKETS



Sources: U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI), Tourism Economics, and Brand USA proprietary projections

KEY LEARNING

- By 2021, China is on track to become the 3rd largest source of international arrivals and Brazil will not be very far behind. While the influx of visitors from China and Brazil is rather expected at this point, the influx of travelers from other parts of Latin America is significant as well. When Argentina, Colombia and Venezuela are depicted individually it is not immediately obvious how large the opportunity is. When combined, however, the countries contributed more arrivals than China in 2012.

IMPLICATION

- The mix of visitors will be significantly different in 2021. In addition to the well-publicized growth of BRIC markets, Latin America outside of Brazil will also represent an extremely important source of growth.

Understanding Growth Potential and Market Share

Amid the volatile ups and downs of economies around the world, arrivals trends cannot tell the whole story. During a recession, decline of 2 percent could reflect strong results; performance must be evaluated in the context of the overall market. Therefore, market share is a key determinant in understanding our performance over time, as well as what our growth potential is in specific markets. Canada will remain our largest source of visitors for the foreseeable future, but our enormous share of the market limits its growth potential. In contrast, our very low share of Russian travelers sets its growth prospects very high (off a much smaller base).

Chart 3 depicts multiple elements. The inner circles represent 2012 arrivals volume and the outer circles represent forecasted 2021 arrivals. The circles are plotted on the horizontal x axis based on the USA's 2012 market share of long haul departures (all international departures for Canada and Mexico). The vertical y axis placement represents the projected growth of 2021 compared to 2012 arrivals.

Chart 4 is arranged similarly, but the inner circles represent 2012 total foreign departures and the outer circles represent forecasted 2021 total foreign departures. As in Chart 3, the circles are plotted on the horizontal x axis based on the USA's 2012 market share of long haul

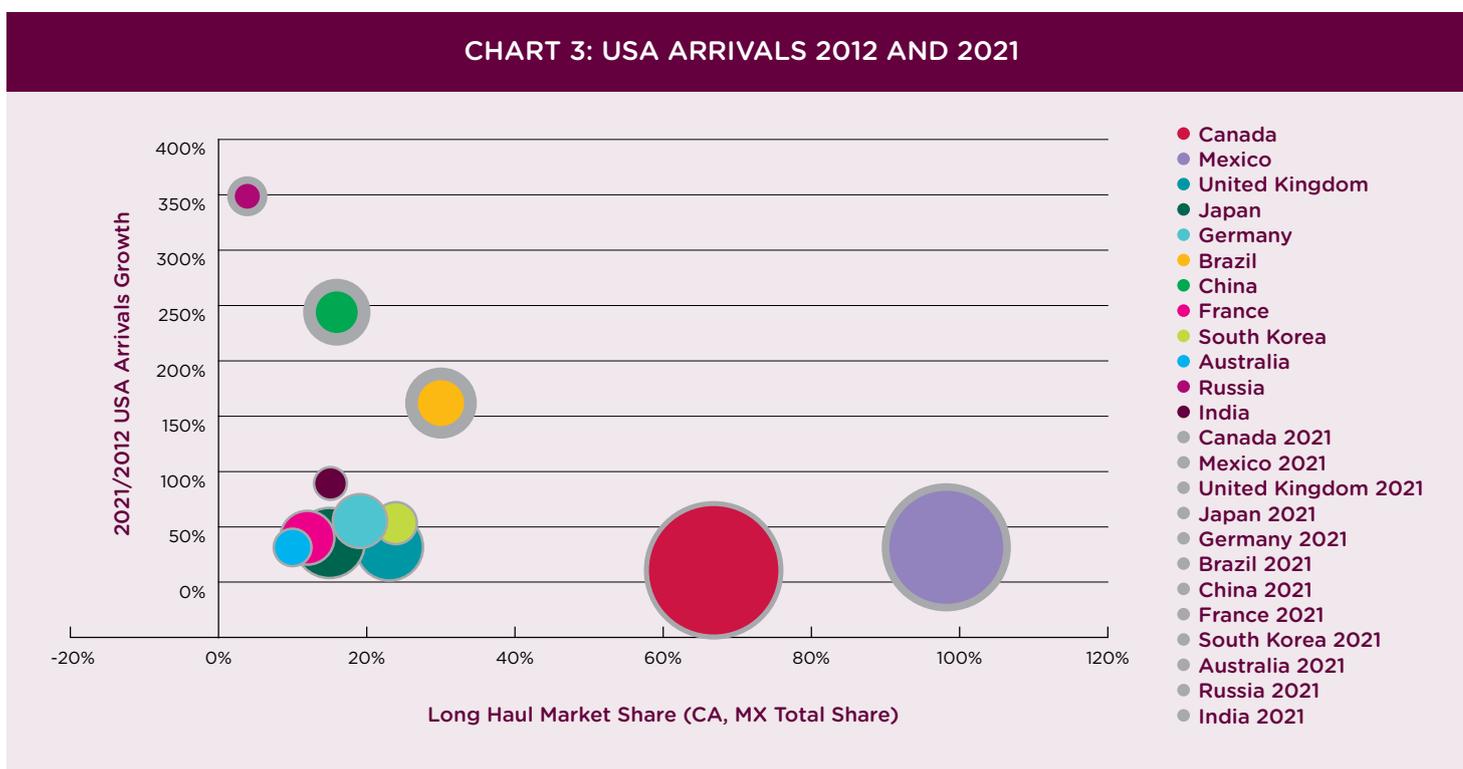
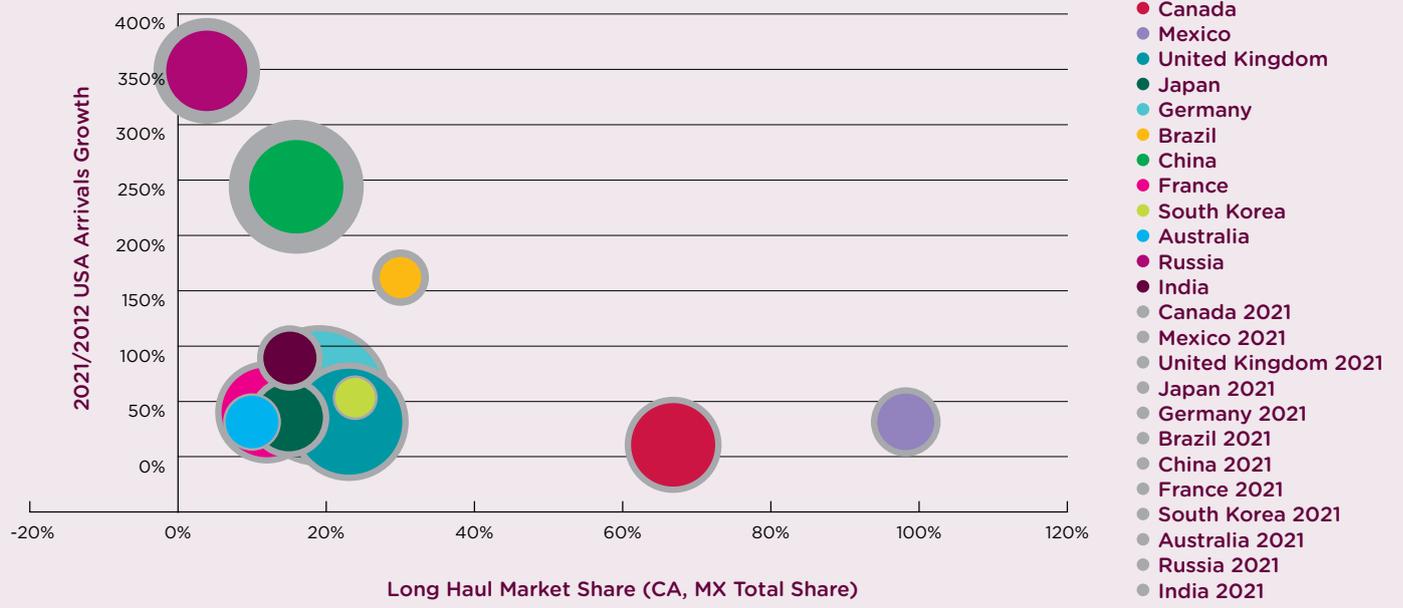


CHART 4: TOTAL FOREIGN DEPARTURES 2012 AND 2021



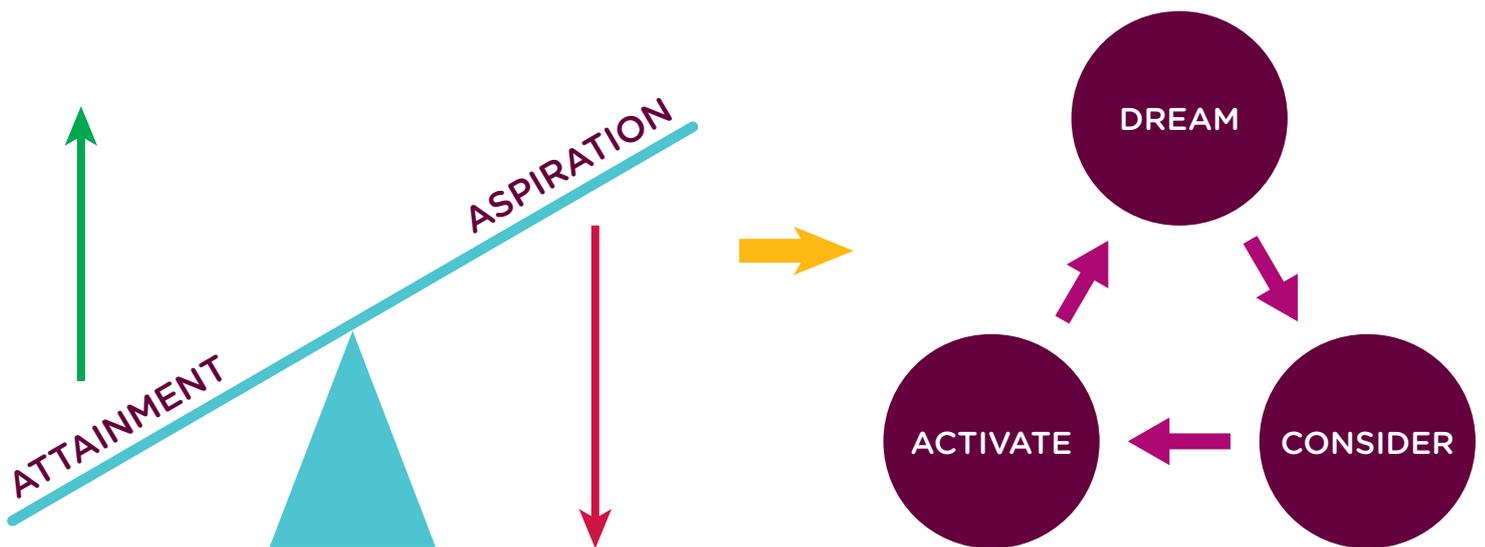
KEY LEARNING

- One of the factors considered in projecting the long-term growth targets for source markets is the USA's current market share of all foreign departures. The USA has relatively low share in Russia, Australia and France. However, each market has a different set of drivers for this share. Barriers to Australian visitors are fundamental; we can't make it any closer. Therefore the growth targets are modest. In contrast, Russia's is driven by both relatively weak demand as well as product accessibility in the local marketplace (both of which Brand USA can actively improve.)

IMPLICATION

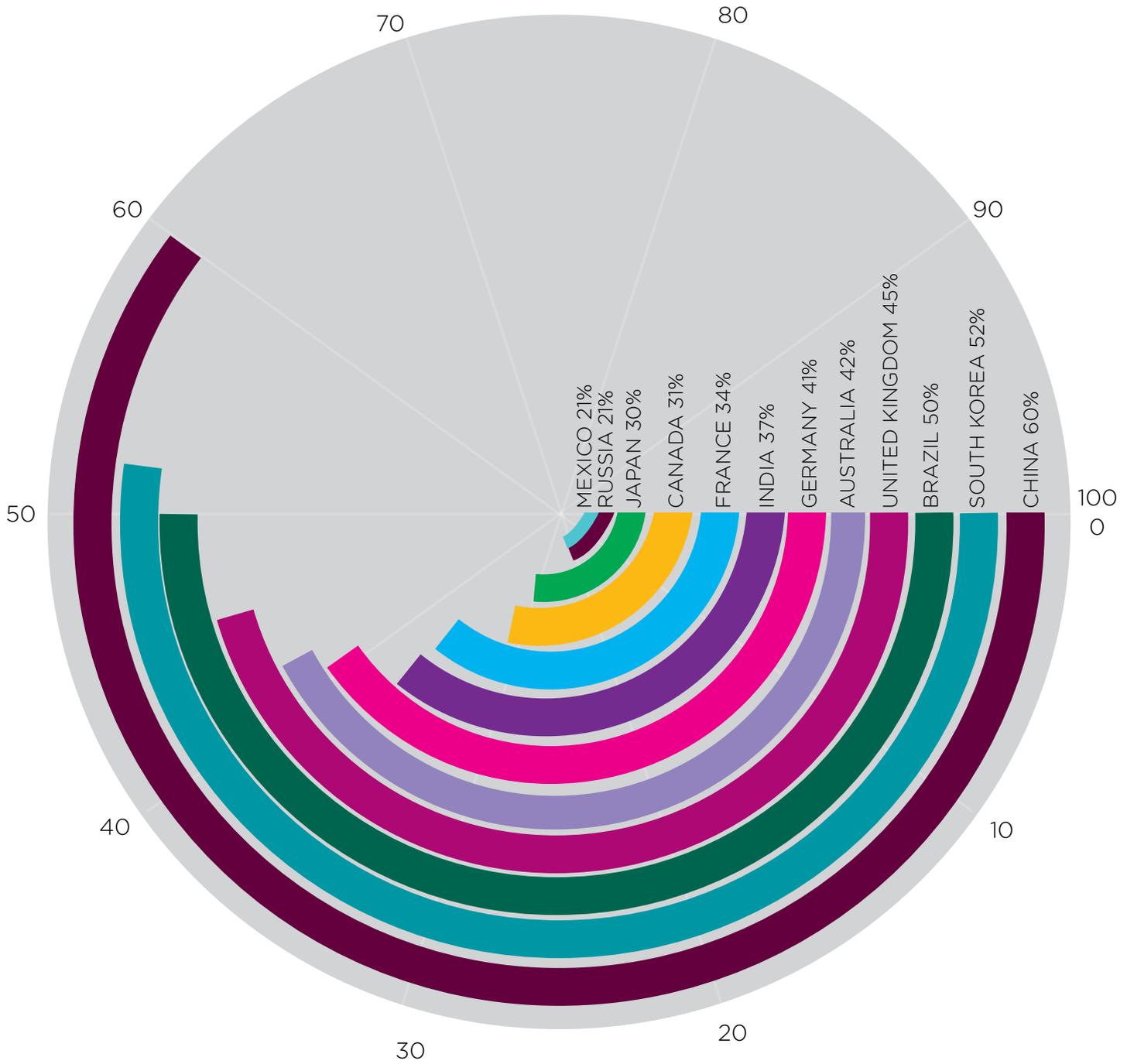
- Brand USA must invest in markets that have strong growth potential, not just the markets that are already large. The strategies deployed for each market must address demand generation as well as barrier removal for each of these markets.

Target Travel Cycle Phase



USA Wish List Share

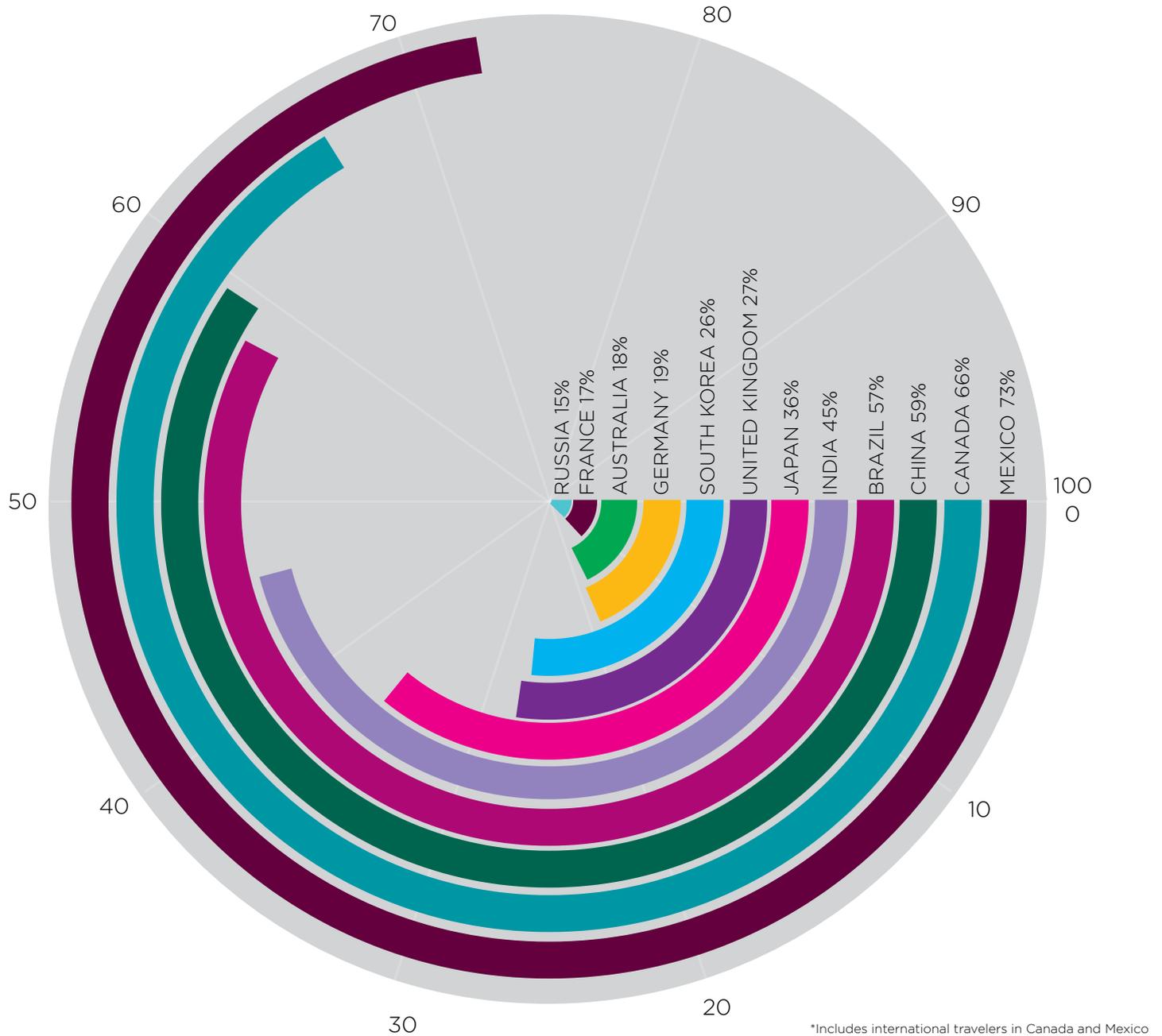
Percentage of intercontinental travelers* who list the United States on their destination wish list



*Includes international travelers in Canada and Mexico

Intent to Visit the USA

Percentage of intercontinental travelers* who are likely to visit the United States in next 12 months



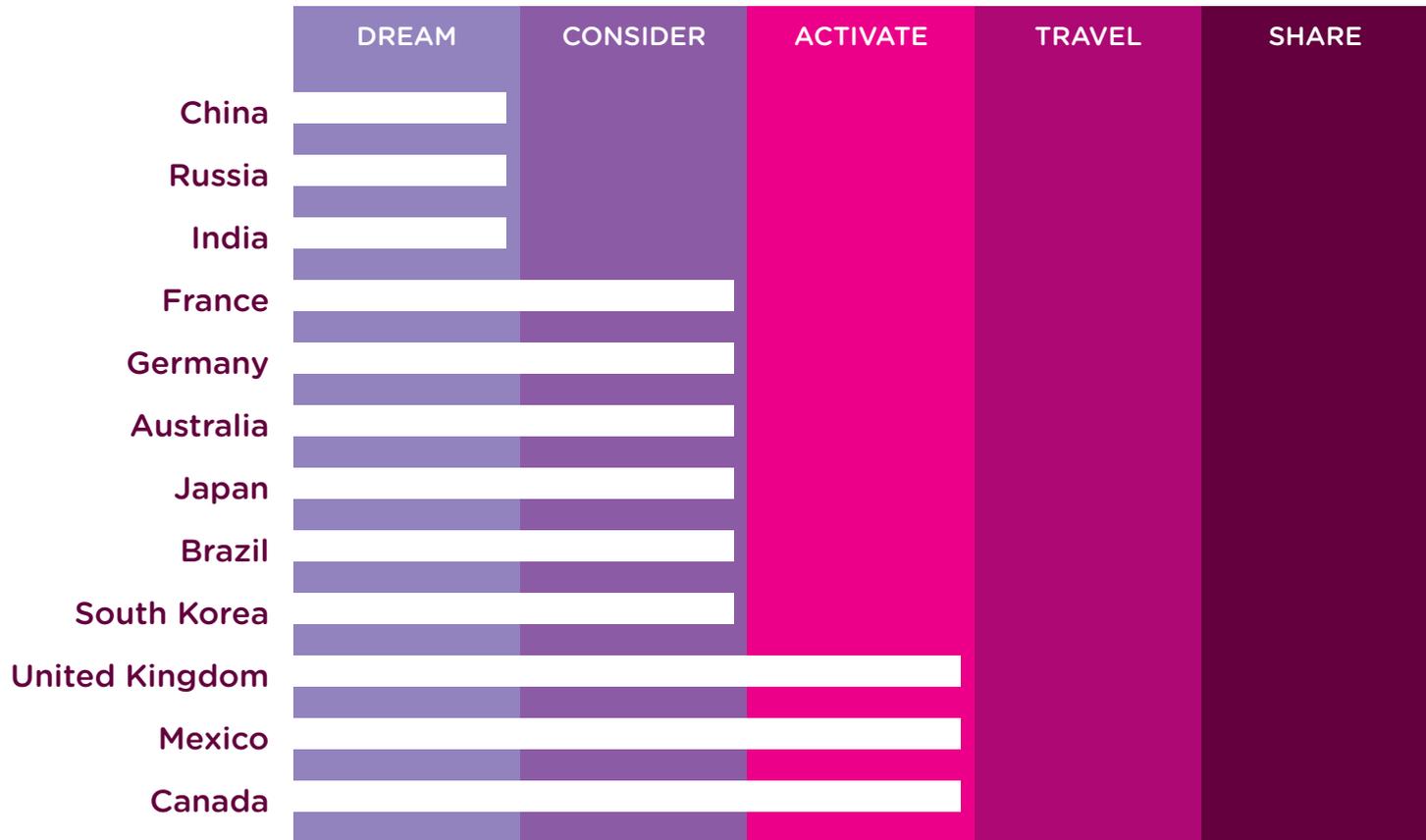
KEY LEARNINGS

- There is an inherent negative relationship between consumer aspiration and attainment. The more accessible and everyday a destination becomes, the less people dream about it. The USA is easily attainable for Canada and Mexico and therefore the USA ranks relatively low in their aspirations.
- Though China and Brazil are already high for both aspiration and attainment, long distance travel remains isolated to the upper levels of income earners in these markets. This inflates the attainability results for these emerging markets as this analysis is based on results among only long-distance leisure travelers. If based on a broader section of the population, the results for China and Brazil would be closer to Korea's.

IMPLICATIONS

- The aspiration/attainment scale reflects two corresponding functions of Brand USA: demand generation (consumer marketing) and in-market retail development (global partnerships). Brand USA will allocate a mix of efforts based on where markets are in this continuum.
- Brand USA must focus on building and enhancing product development among in-market retailers as well as educating domestic partners on how best to leverage the resulting opportunities. Consumer marketing will approach each market differently based on local media landscape and cultural nuance.
- Russia presents a unique opportunity in that it ranks relatively low in both aspiration and attainment, yet already is a large source of international travelers. Even reaching "fair share" of the market will boost current visitation multiple times over.

Target Travel Cycle Phase



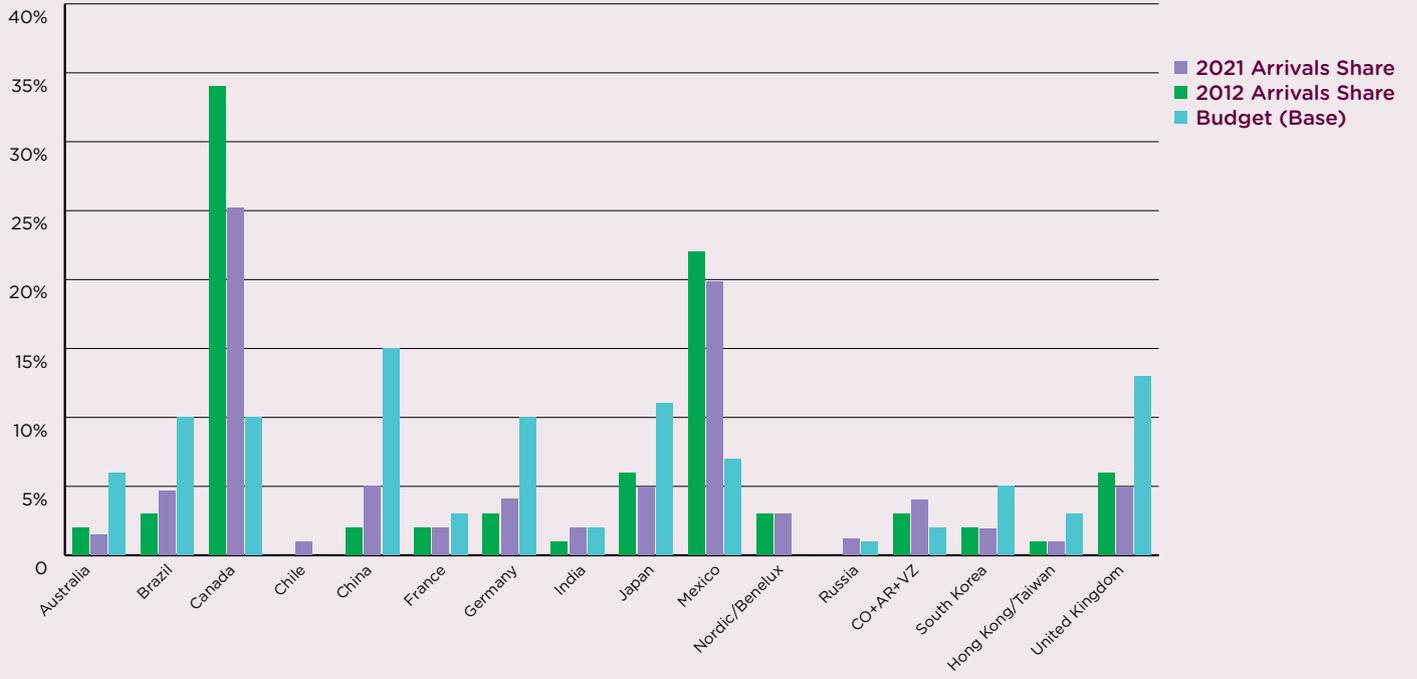
KEY LEARNING

- The target markets that will drive the most visitation in coming years are at different levels of consumer demand and commercial development, requiring strategic focus on certain areas rather than a blanket approach.

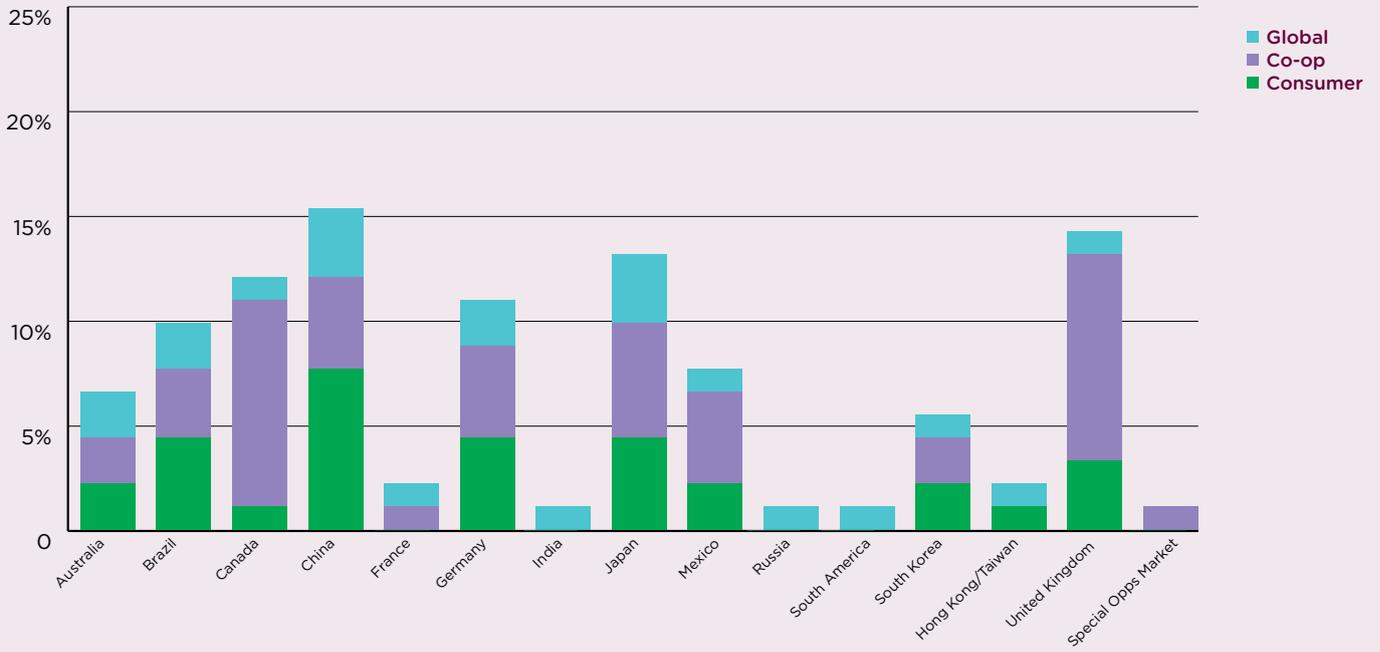
IMPLICATION

- Based on varying phases of familiarity and affinity for travel to the USA, marketing activity will be focused around one particular stage of the travel life cycle. Efforts in mature markets such as Canada and the U.K. will focus on facilitating and creating strong booking calls to action, while the approach in emerging markets will focus on inspiration.

SHARE OF ARRIVALS VS. SHARE OF FY14 MARKETING BUDGET



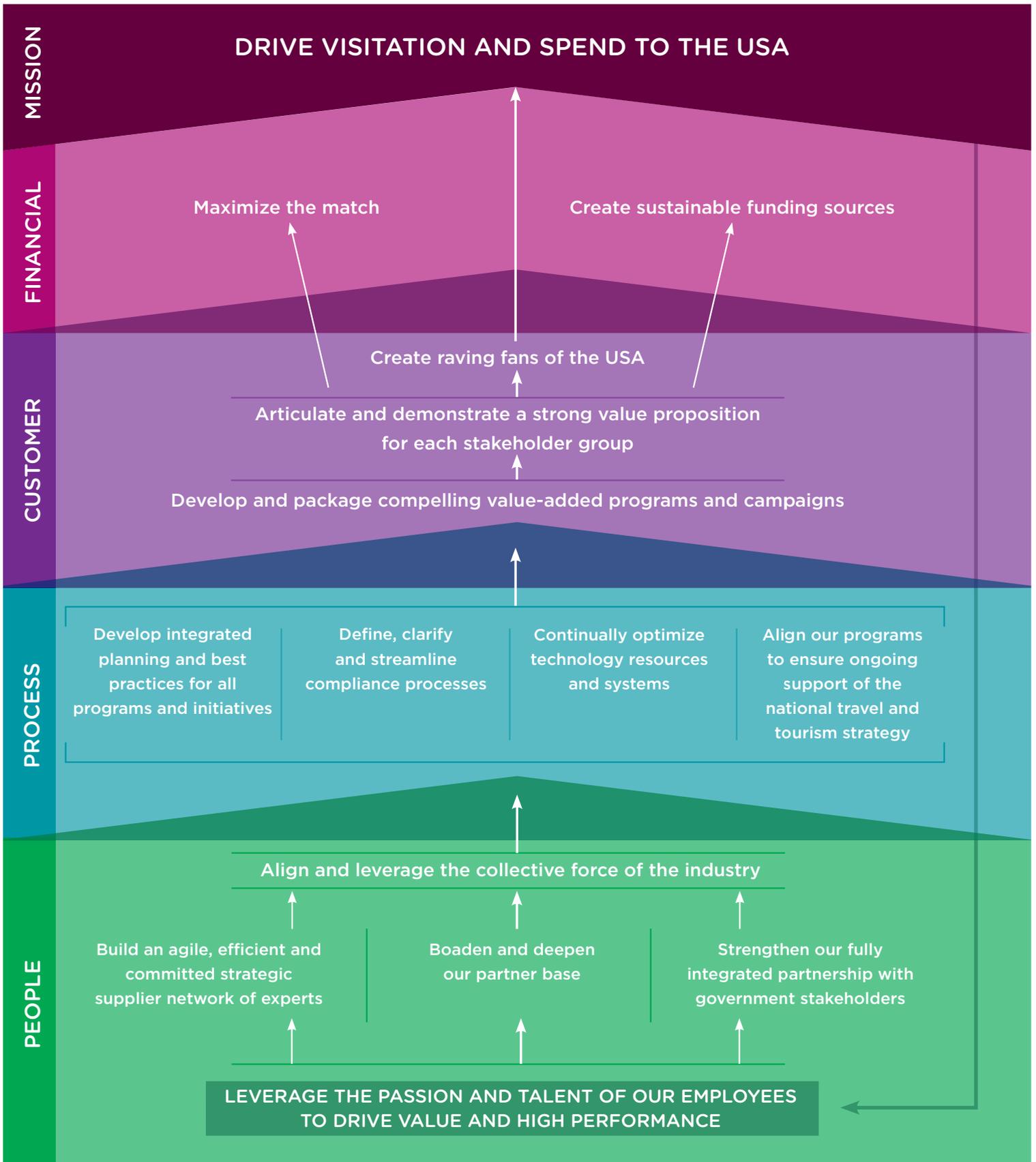
COMPONENTS OF FY14 MARKETING BUDGET



FY14 STRATEGIC IMPERATIVES

Operational Ease • Customer Focus • Value Creation • Revenue Growth • Collaboration

The Strategy Map



Balanced Score Card

	OBJECTIVES	GOALS
MISSION	Drive visitation and spend to the USA	<ul style="list-style-type: none"> • Attributable increase in visitation • Attributable increase in spend
FINANCIAL	Maximize the match	<ul style="list-style-type: none"> • Percentage increase in eligible matching funds received
	Create sustainable funding sources	<ul style="list-style-type: none"> • Percentage increase in the number of cash and in-kind partners • Percentage increase in unrestricted cash contributions
CUSTOMER	Develop and package compelling value-added programs and campaigns	<ul style="list-style-type: none"> • Percentage increase in co-op program participation • Partner program retention rate
	Articulate and demonstrate a strong value proposition for each stakeholder group	<ul style="list-style-type: none"> • Brand USA Value Index (aggregated surveys of results)
	Create raving fans of the USA	<ul style="list-style-type: none"> • Consumer Net Promoter Score • Social Sentiment Index
PROCESS	Develop integrated planning and best practices for all programs and initiatives	<ul style="list-style-type: none"> • DMAP certification as a best practice DMO
	Define, clarify, and streamline compliance processes	<ul style="list-style-type: none"> • Percentage compliance to policies and procedures • Average number of ESTA filing days (cycle time) (from contribution to receipt of funds) • Average time to process/pay invoices
	Continually optimize technology resources and systems	<ul style="list-style-type: none"> • Percentage of planned technology resources implemented on time and within budget
	Align our programs to ensure ongoing support of the national travel and tourism strategy	<ul style="list-style-type: none"> • Percentage achievement of Travel Promotion Council shared annual objectives
PEOPLE	Align and leverage the collective force of the industry	<ul style="list-style-type: none"> • Reauthorization
	Build an agile, efficient and committed strategic supplier network of experts	<ul style="list-style-type: none"> • Percentage of suppliers Brand USA Certified • Percentage of suppliers meeting or exceeding annual performance goals
	Broaden and deepen our partner base	<ul style="list-style-type: none"> • Number of sponsors/partners outside the travel industry • Percentage share of potential LOA partners • Percentage increase in per-partner contribution
	Strengthen our fully integrated partnership with government stakeholders	<ul style="list-style-type: none"> • Champion Index among government stakeholders and leadership
	Leverage the passion and talent of our employees to drive value and high performance	<ul style="list-style-type: none"> • Percentage of employees Brand USA Certified • Percentage of employees meeting or exceeding annual performance goals

Strategy Map Definitions

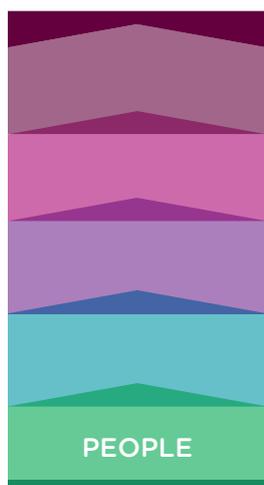
Strategy Map	<p>Methodology created by Kaplan & Norton that graphically tells the story of how value is created within a business. Like a story, a cause and effect relationship shows how components of a strategy interrelate.</p> <p>The map depicts the strategy through four perspectives:</p> <ul style="list-style-type: none"> • People: What skills, knowledge, capabilities and organizational capital must our organization have to be successful? • Process: At what business processes must we excel? • Customers: What do our customers want from us? • Financial: What results do our stakeholders expect from us?
Balanced Score Card	<p>A document comprised of the goals that are used to track and report success.</p> <p>The Score Card is “balanced” because the measures work together and are interdependent. In other words, success never depends on just one or two objectives—but rather the accomplishment of all of the objectives and goals in unison.</p>
Objectives	<p>Words describing what we want to accomplish and represent a key driver necessary to achieve overall success. The objectives are laid out on the “map” to represent the cause and effect relationship between each other.</p>
Goals	<p>Numerical targets of what we ultimately want to accomplish established for each objective.</p>
Strategies/Tactics	<p>For each objective and goal we have established strategies and tactics to support their achievement.</p>
Markets	<p>International targets to generate visitation and spend to the USA (can be countries, territories or other geographic areas).</p>
Stakeholders	<p>Any group that has or should have a vested interest in the work and success of Brand USA. Brand USA has identified eight stakeholder groups:</p> <ul style="list-style-type: none"> • Employees • Partners & Sponsors • Travel Trade • Industry Stakeholders • Government Stakeholders • Suppliers/Vendors • Consumers • The American Public
Employees	<p>The Brand USA team of committed individuals who work together to support, develop and execute programs and initiatives that promote the United States as the premier travel destination in order to increase international visitation and spend to the USA.</p>
Partners & Sponsors	<p>Groups or individuals (domestic or international) who have contributed or have the potential to contribute to Brand USA.</p>
Travel Trade	<p>Buyers, promoters, and influencers of travel comprised of the full range of individuals or organizations that organize and sell travel and tours to consumers or influence travel decisions such as travel agents, tour operators, receptive operators, and the media.</p>
Industry Stakeholders	<p>Non-government groups that represent the travel industry (includes associations and other groups such as Brand USA board members, the U.S. Travel Association, Destination Marketing Association International, Visit USA committees, Receptive Services Association, etc.). While media (particularly trade media) is often considered an “industry stakeholder,” we view the media as a channel to reach our stakeholders rather than a stakeholder group unto itself.</p>
Government Stakeholders	<p>Groups with whom Brand USA works in compliance with the Travel Promotion Act and to support the achievement of the National Travel and Tourism Strategy.</p>

Suppliers / Vendors	Vendors procured by Brand USA whom we pay to perform specific duties on our behalf. Vendors in our Supplier Network may additionally act as official representatives or agents of Brand USA
Consumers	People and groups from all over the world who have the means and a range of travel options for leisure or business purposes.
The American Public	U.S. citizens worldwide
Programs	Programs are external to Brand USA and include marketing campaigns, public relations efforts, and any category of giving opportunity for partners such as partnership co-op opportunities.
Initiatives	Process, projects or programs internal to Brand USA such as internal policies and procedures, a new technology platform, or a group formed to review a current process in order to find ways to make it more efficient and/or effective.

<p>PEOPLE <i>A corporate culture that attracts and retains high-caliber people is the foundation of our success</i></p>	<p>Leverage the passion and talent of our employees to drive value and high performance</p>	<p>Smart, talented people are the foundation of Brand USA. They can make amazing things happen. As a result, we focus on fostering a corporate culture that attracts high-caliber people, where integrity is paramount, individuals and teams are empowered and accountable, and relationships are based on mutual trust and respect. Inherent in this high-performance, value-driven environment is a sense of urgency and a commitment to continuous improvement. As a result, while decisions are driven by those with the expertise and the leadership responsibility to do so, we value and foster an inclusive environment where people work collaboratively, are open to new ideas, and are honest and straight forward with each other.</p>
	<p>Build an agile, efficient and committed strategic supplier network of experts</p>	<p>Our supplier network is comprised of vendors and other individuals and organizations procured by Brand USA to perform specific duties on our behalf. Each member of our supplier network operates seamlessly and fully integrated as a part of Brand USA and is expected to utilize Brand USA resources efficiently and only in the pursuit of achieving organizational objectives and strategies. Vendors in our network may additionally act as official representatives or agents of Brand USA and, as such, are a critical extension of our employee base. Therefore, they are also held to the same values and performance principles as the core Brand USA team.</p>
	<p>Broaden and deepen our partner base</p>	<p>This objective speaks to the need to diversify our funding and ensure repeat funding from existing partners. In order to do so, we will look to significantly fully engage and expand the number and types of groups or individuals (domestic or international) who have contributed to or have the potential to contribute to Brand USA. Categories of partners are virtually endless and can include the range from destinations, transportation providers, and travel brands to government stakeholders, to associations, to non-travel brands, etc.</p>
	<p>Strengthen our fully integrated partnership with government stakeholders</p>	<p>Groups with whom Brand USA works in compliance with the Travel Promotion Act and to support the achievement of the National Travel and Tourism Strategy are critical to our success. As a result, we will work to continually engage and seek input from our various government stakeholders. These stakeholders include the federal agencies, with which we collaborate on various programs, and elected officials whom we are obligated to keep informed of our activities.</p>
	<p>Align & leverage the collective force of the industry</p>	<p>This objective speaks to our building close, mutually productive relationships with all stakeholders (internal and external) who contribute to our fulfilling our reason for being (our purpose). We will do this by continually seeking input and feedback.</p> <p>By working together, we can combine forces to support common objectives and develop agreed upon methods for leveraging our resources to accomplish more than we can through individual efforts. As referenced here the “industry” includes government and non-government groups, current and prospective partners, travel-related business associations, buyers and suppliers.</p>
<p>PROCESS <i>With the right people and culture, we can establish and continually improve our processes</i></p>	<p>Develop integrated planning and best practices for all programs and initiatives</p>	<p>This objective speaks to our process-driven culture—which is internally and externally integrated and commits us to learning from both our successes and failures, as well as benchmarking our performance against the very best in the industry, in business and ourselves. We know that to achieve success, we must plan, connect and integrate consumer and partner needs with the work of all Brand USA departments—each of which provides a unique and important perspective on driving value and delivering results. In this objective, programs are defined as external to Brand USA (such as marketing campaigns, public relations efforts, any category of giving opportunity for partners, etc.) and initiatives are internal (including processes, projects or programs specific to Brand USA such as internal policies and procedures, new technology platforms, groups formed to review a current process to find ways to make it more efficient, etc.).</p>

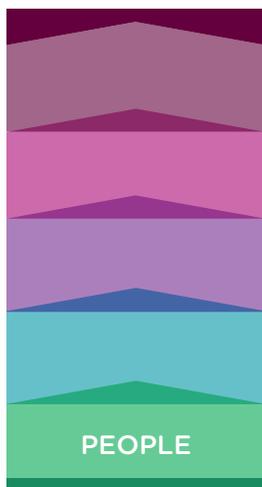
<p>PROCESS: <i>With the right people and culture, we can establish and continually improve our processes</i></p>	<p>Define, clarify and streamline compliance processes</p>	<p>We simplify, standardize and streamline our current work whenever possible to ensure we not only operate efficiently and externally focused on customer needs, but also in compliance with all laws, the Travel Promotion Act, and our own policies and procedures. Compliance is critical to our earning and maintaining integrity and credibility—and it requires communication and structure that passes the test of reasonability and where clear and logical consequences are consistently applied.</p>
	<p>Continually optimize technology resources and systems</p>	<p>To drive value and ensure we achieve our core purpose, we must have the right technology platforms in place to support our efforts. Much of the work we are doing to optimize our technology resources and systems is being accomplished with the help of Digital DNA Infusion.</p>
	<p>Align our programs to ensure ongoing support of the national travel & tourism strategy</p>	<p>In addition to meeting the mandate of the Travel Promotion Act, we must also ensure our programs support the achievement of President Obama's goal (established in May 2012 with the publication of the National Travel & Tourism Strategy) to bring 100 million international travelers to the United States by the year 2021.</p>
<p>CUSTOMER <i>With the right people and processes in place, we are better able to understand and meet customer needs</i></p>	<p>Develop and package compelling value-added programs and campaigns</p>	<p>This objective speaks to our commitment to do only what adds value — to develop a keen understanding of our customers and their needs—and then create products, programs, and marketing campaigns that drive success and build our brand equity with all stakeholders.</p>
	<p>Articulate and demonstrate a strong value proposition for each stakeholder group</p>	<p>By developing a keen understanding of our customers' needs, we can then create and articulate a strong value proposition (specific to each stakeholder group). Concurrently, by developing programs and campaigns that meet the needs we have articulated, we can then demonstrate value through results. Our value proposition can be demonstrated directly through program and campaign results, as well as indirectly through testimonials—and can be delivered through all available channels (direct to the customer, as well as through the media, at conferences, at events, and through newsletters and public reports, and on our websites, etc.).</p>
	<p>Create raving fans of the USA</p>	<p>This objective references a term coined by business author Ken Blanchard* and speaks to the loyalty and advocacy factor essential to making an organization excel. In this objective, we are specifically talking about the USA the destination—and fans being those who visit and those who influence others to visit us, including buyers (i.e., the international travel trade) and consumers (international travelers). To create raving fans of the USA, we must promote and deliver the United States as a premier travel destination (B2B and B2C), communicate entry policies, and make the arrival experience more welcoming. * According to Ken Blanchard, creating "Raving Fans" "turns a customer into a lifetime customer...and an advocate..."</p>
<p>FINANCIAL <i>By accomplishing our people, process, and customer objectives, we will generate the revenue required to function as a long-term going concern to fuel our efforts</i></p>	<p>Maximize the match</p>	<p>This objective speaks not only to attracting partner funding through in-kind and cash contributions that allow us to drawn down 100% of eligible Federal funds, but also to utilizing these funding dollars wisely to maximize ROI.</p>
	<p>Create sustainable funding sources</p>	<p>In addition to maximizing the match, we must also seek ways to generate funding by delivering value and partner ROI at a level that, in concept, would enable us to sustain our operations even in the absence of government funding. In other words, we will seek to do our job so well that others continually invest in us and turn to us to help them maximize their international marketing efforts. This objective requires us to do what is necessary to become the gold standard in destination marketing and partner programs.</p>
<p>MISSION <i>With the right people and processes and a focus on the customer, we can achieve the financial targets that enable us to achieve our mission</i></p>	<p>Drive visitation and spend to the USA</p>	<p>This is our ultimate reason for being—with the understanding that the most economically powerful visitation is visitation from those who spend the most. Increasing the number of international travelers who come to the United States (who spend more and stay longer than previous visitors) gives us the fuel to continue to engage our employees, partners and other stakeholders to accomplish even greater feats. Thus, we continue the process of attracting the best and the brightest to Brand USA further expanding our partnership base, taking our integrated partnership with government stakeholders to greater heights, and aligning and leveraging the collective force of the industry. We then are able to further enhance our processes, to better serve and deliver value to our customers, to increase our funding, and to build our financial strength....and ultimately and continually drive consistent year over year increases in visitation and spend to the USA. Our strategy map is designed to be a self-sustaining, winning process—one worthy in both endeavor and cause. Together we are Brand USA.</p>

STRATEGIES, TACTICS AND GOALS



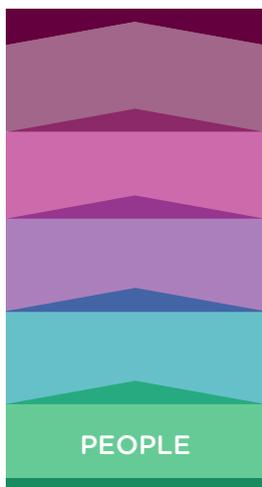
Leverage the Passion and Talent of Our Employees to Drive Value and High Performance

STRATEGIES	TACTICS	GOALS
<p>1. Build a results-driven team that recognizes and rewards performance. Measure and manage employee performance using a Performance Management System with clear goals at the individual and department level.</p>	<ul style="list-style-type: none"> • Create and implement a performance management system, including annual performance review process and goal development tied to the Strategy Map and Balanced Score Card. • Develop departmental dashboards across the organization that tie to the Balanced Score Card. 	<ul style="list-style-type: none"> • Performance management system implemented by 1/15/14 and 100% of employees having goals set by 2/15/14 and 85% of employees meeting or exceeding annual performance goals by the end of FY14 • Department dashboards completed by 11/15/13
<p>2. Create a more collaborative culture that operates with integrity and trust through better communication of common goals, shared values, and team performance-based compensation.</p>	<ul style="list-style-type: none"> • Establish and operationalize our cultural standards. • Company performance-based incentive program comprised of individual, shared, and company-wide goals. 	<ul style="list-style-type: none"> • Documented cultural standards establish 12/1/13 • Incentive program developed and presented to the board of directors board at first scheduled meeting in calendar year 2014 and implemented by 3/1/14
<p>3. Provide orientation and training to our employees to ensure Brand USA knowledge and understanding, resulting in Brand Experts.</p>	<ul style="list-style-type: none"> • Create Brand USA Certification program. 	<ul style="list-style-type: none"> • Program designed and implemented by 1/15/14 • 100% of employees Brand USA certified by 3/1/14
<p>4. Empower data-driven decision making across Brand USA.</p>	<ul style="list-style-type: none"> • Design and execute market intelligence program that guides marketing planning. • Build decision support practices and testing methodologies. • Issue RFP and select vendor for ad hoc research support (Omnibus provider). 	<ul style="list-style-type: none"> • Market Intelligence Program approach outlined by 9/30/13 • Practices and testing methodologies built by 10/1/13 • RFP issued by 10/1/13 and omnibus vendor selected by 10/31/13
<p>5. Reassess and build the organizational structure for maximum effectiveness and efficiency.</p>	<ul style="list-style-type: none"> • Evaluate, create, and implement new high performance structure. • Establish a talent review process. • Conduct an overall compensation study. 	<ul style="list-style-type: none"> • New structure implemented by 10/1/13 • Process developed by 5/1/14 • Study completed by 1/15/14
<p>6. Leverage our in-house subject matter expertise and teamwork to achieve the best decision making.</p>	<ul style="list-style-type: none"> • Weekly review of deals—with valuation tied to partner and consumer fit, market potential, and ROI expectations. • Include information about areas of expertise on all employee biographies. 	<ul style="list-style-type: none"> • Weekly reviews of deals implemented by 10/1/13 • Bios updated by 12/1/13



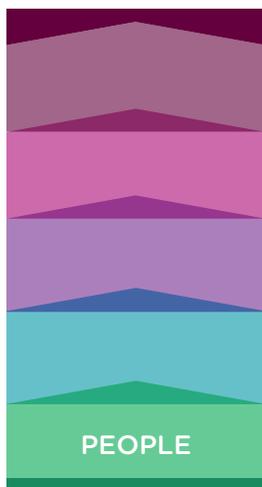
Leverage the Passion and Talent of Our Employees to Drive Value and High Performance

STRATEGIES	TACTICS	GOALS
<p>7. Motivate employees through information sharing and recognition.</p>	<ul style="list-style-type: none"> • Develop a brown bag lunches program for Brand USA employees to educate each other and share ideas about Brand USA programs and initiatives. • Hold all-staff meetings once per month. • Create employee rewards/recognition program that is fun and performance based. • Create dedicated internal newsletter that is dynamic and user generated. • Integrate communications staff in regular departmental and international representation firm meetings/calls to ensure consistent flow of information. 	<ul style="list-style-type: none"> • Brown bag lunch calendar established by 12/1/13 • First all-staff meeting held and future meetings scheduled by 10/15/13 • Employee rewards/recognition program implemented by 1/15/14 • Employee online newsletter implement by 4/1/14 • Designated communications staff member(s) scheduled to attend cross-department and international representation firm meetings/calls by 12/1/13
<p>8. Create better definition of team roles, responsibilities, and decision ownership.</p>	<ul style="list-style-type: none"> • Ensure all job descriptions are up to date and accurate. • Create department statements of purpose. • Process mapping of all core processes. 	<ul style="list-style-type: none"> • Job descriptions completed by 12/15/13 • Department statements of purpose completed by 3/1/14 • Process mapping completed by 12/31/13
<p>9. Develop an effective inclusion and diversity strategy to build a world class team and culture.</p>	<ul style="list-style-type: none"> • Ensure diversity is emphasized in our values statement. • Develop training program for diversity and inclusion. 	<ul style="list-style-type: none"> • Values statement drafted by 12/1/13 and formalized by 1/15/14 • Training program implemented by 6/1/14



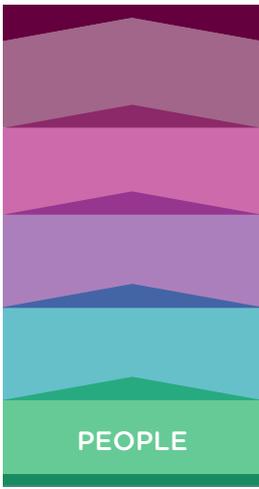
Build an Agile, Efficient and Committed Strategic Supplier Network of Experts

STRATEGIES	TACTICS	GOALS
<p>1. Align, unify, and maximize the impact of our in-market representation firms.</p>	<ul style="list-style-type: none"> • Create training and education program for Brand USA certification. • Create annual strategic forum for communicating direction and goals and to share best practices. • Expand our international representation firm arsenal to cover more in-bound travelers to the United States. • Create Brand USA email addresses for all international representation firms. 	<ul style="list-style-type: none"> • Program implemented by 3/1/14 and 100% of suppliers Brand USA certified by 6/1/14 • Annual meeting for IPW 2014 scheduled by 1/5/14 • Representation firms covering 18 regions, 40 countries 90% of inbound visitation by 1/15/14 • Email addresses established for international representation firms by 2/1/14
<p>2. Provide our supplier network with clear direction and goals by which we measure their success.</p>	<ul style="list-style-type: none"> • Implement financial and performance goals by market or supplier. 	<ul style="list-style-type: none"> • Goals established and communicated by 12/1/13 with 85% of suppliers meeting or exceeding annual performance goals at year-end FY14
<p>3. Build and utilize a network of subject matter expert consultants to supplement our full-time employee resources.</p>	<ul style="list-style-type: none"> • Create talent database of suppliers and conduct talent review. • Source outside consultants for sponsorship development with a focus on attracting high net worth individual contributors for IMAX and other large scale projects. 	<ul style="list-style-type: none"> • Talent database completed by 3/1/14 and talent review initiated by 4/15/13 • Hire outside consultant by 10/1/13 • Contributions from high net worth individuals committed by 9/30/14
<p>4. Ensure best in class diversity of our supplier base.</p>	<ul style="list-style-type: none"> • Implement accounting vendor tracking system. • Develop a diversity supplier database. • Require diversity evaluation component in all RFPs. 	<ul style="list-style-type: none"> • Vendor tracking initiated by 12/1/13 • Database developed by 3/1/14 • Diversity component incorporated into RFP process by 10/1/14
<p>5. Fully integrate communications and public policy in all international representation firm activities.</p>	<ul style="list-style-type: none"> • Create communications protocol and procedures. • Participate in all international representation firm calls. • Create marketing, communications, and administrative tool kit of materials and resources. • Ensure all international representatives have Box access. 	<ul style="list-style-type: none"> • Protocol and procedures established by 1/15/14 • Consistent participation in calls achieved by 10/1/13 • Tool kit created by 2/1/14 • Box access established by 12/15/13



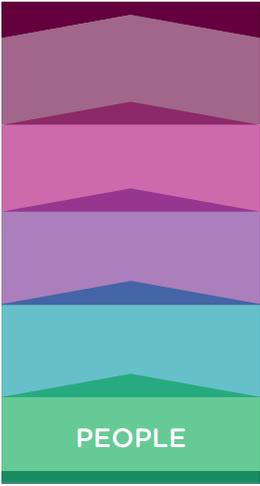
Broaden and Deepen Our Partner Base

STRATEGIES	TACTICS	GOALS
<p>1. Deepen commitment of current contributing partners by ensuring and measuring the understanding and engagement in the Brand USA mission.</p>	<ul style="list-style-type: none"> • Create an in-bound travel summit to communicate purpose, goals, activities, and ROI. • Leverage industry conferences and events to tell the Brand USA story and to educate potential partners on the reason for and value in LOAs as part of the Brand USA value proposition. • Create new marketing materials that are current and compelling and can be distributed both physically and electronically for different audiences via CRM segmentation software • Create advisory committees and listening posts to ensure our partners have a venue for contributing ideas and insights. • Create and conduct engagement survey to administer to partners (with a focus on partners who have signed Letters of Agreement with Brand USA). 	<ul style="list-style-type: none"> • Plan developed by 1/15/14 • Brand USA speakers at all Founding Partner events • Marketing materials completed by 2/1/14 • Advisory committee structure and listening posts implemented by 3/1/14 • Survey implemented by 1/15/14 to establish baseline and conducted two times a year going forward • Percentage increase in per-partner contribution and potential LOA partners
<p>2. Expand partner base by targeting current non-participating travel brands/DMOs/CVBs and creating differentiated value-added programs as part of a formal Beyond the Gateway strategy.</p>	<ul style="list-style-type: none"> • Create a priority list of potential partners. • Create co-op marketing programs/products with an increased focus on developing programs that attract and benefit smaller DMOs and CVBs. • Create communication tools to help sell and promote the programs. 	<ul style="list-style-type: none"> • Priority list created by 11/1/13 • Products developed by 12/1/13 • Selling tools created by 1/15/14 • Twenty new contributors obtained by 9/30/14
<p>3. Expand sponsorship base by targeting high net-worth Americans with program for individual giving.</p>	<ul style="list-style-type: none"> • Identify and engage outside experts with existing target relationships. • Create a priority list of potential high net-worth individuals. • Develop a core engagement pitch that clearly and accurately communicates value to potential sponsors. • Create marketing communication selling tools to support sponsorship development efforts. 	<ul style="list-style-type: none"> • Outside expertise contracted by 9/15/13 • Priority list created by 10/31/13 • Core pitch developed by 11/1/13 immediately followed by sales calls • Selling tools created by 11/1/13 • Three sponsors established by 9/30/14
<p>4. Connect and engage with airlines creating new routes and leverage promotional opportunities to support their efforts.</p>	<ul style="list-style-type: none"> • Leverage industry relationships to stay aware of new route development. • Attend and leverage airline industry trade shows. 	<ul style="list-style-type: none"> • Ongoing • Attendance at Routes each year



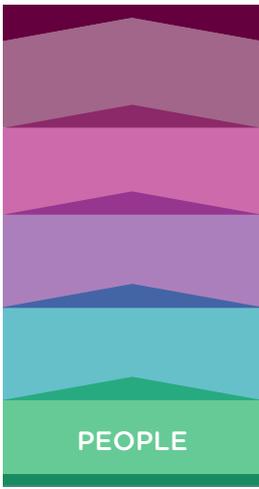
Broaden and Deepen Our Partner Base

STRATEGIES	TACTICS	GOALS
<p>5. Develop a partner cultivation and communication strategy to support business development and partner retention (targeting both current and potential partners).</p>	<ul style="list-style-type: none"> • Leverage existing industry events to convene and celebrate current and potential partners. • Develop an annual partner event (public board meeting or IPW). • Develop core B2B materials (all mediums). 	<ul style="list-style-type: none"> • Priority events identified by 1/15/14 • Plan for annual partner and related events developed by 12/1/13 • Materials created by 1/15/14
<p>6. Expand partner base by creating sponsorship program for non-travel companies.</p>	<ul style="list-style-type: none"> • Create a priority list of potential non-travel sponsors, with an eye for IMAX participation. • Build a core programs/solutions pitch that clearly communicates value to potential sponsors. • Create communication tools for selling. 	<ul style="list-style-type: none"> • Priority list created by 11/1/13 • Core pitch developed by 11/1/13 immediately followed by sales calls • Selling tools created by 11/15/13 • Five new partners/sponsors outside of travel industry added by 9/30/14
<p>7. Demonstrate ROI on all partner contributions before soliciting for additional funds.</p>	<ul style="list-style-type: none"> • Create success metrics that are well articulated, understood, and consistently used with our partners. 	<ul style="list-style-type: none"> • Metrics for core programs with associated key performance indicators established by 1/15/14



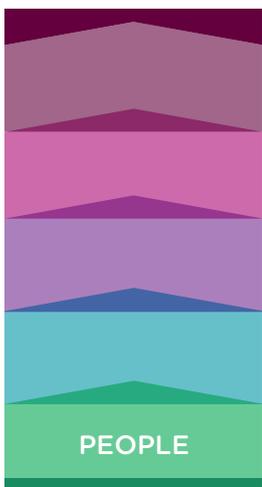
Strengthen Our Fully Integrated Partnership with Government Stakeholders

STRATEGIES	TACTICS	GOALS
<p>1. Develop trusted working relationships with government stakeholders through information sharing.</p>	<ul style="list-style-type: none"> • Continue to execute against cultivation strategy with members of the Commerce Department, the State Department, the Homeland Security Department, and congressional committee members and staff (updating the plan as needed for 2014). • Conduct in-state or district roundtables with local industry, chamber, and other travel related entities, members and/or their staff. • Establish a regular schedule of in-person meetings with Congressional Committee members and Brand USA's CEO. • Whenever possible, hold board meetings, advisory committee meetings and other Brand USA events in key travel districts. • Develop methodology and deploy champion index. 	<ul style="list-style-type: none"> • Update by 12/1/13 • Two to three roundtables conducted per month beginning 3/1/14 • At least two meetings per month held with members and Brand USA's CEO beginning 3/1/14 • Advisory committee meeting in relevant district/state held by 3/1/14 • Champion index developed by 1/15/14
<p>2. Create a shared understanding of the importance of international inbound travel and the best way to improve communication of U.S. travel policies.</p>	<ul style="list-style-type: none"> • Create a travel summit with Federal agencies. • Create a federal agency cultivation strategy to leverage engagement opportunities with government stakeholders to solicit feedback, report on results, and build relationships. • Conduct roundtables educating TSA screeners at various airports on the importance of international travel. 	<ul style="list-style-type: none"> • Plan for travel summit developed by 2/1/14 • Cultivation strategy developed by 12/1/13 • Roundtables in three cities by 2/1/14



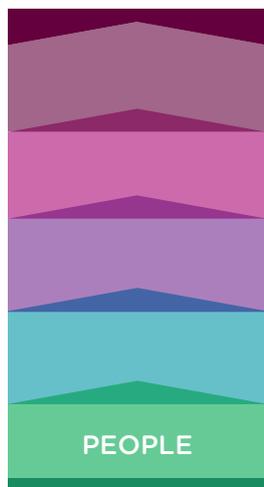
Strengthen Our Fully Integrated Partnership with Government Stakeholders

STRATEGIES	TACTICS	GOALS
<p>3. Strengthen confidence government stakeholders have in Brand USA through increased communications and success sharing</p>	<ul style="list-style-type: none"> • Develop and distribute a regular monthly newsletter to key government stakeholders. • Distribute monthly update of Brand USA-Federal collaborative activities to the Travel Promotion Council. • Create annual calendar of regular meetings. • Participate in monthly Travel Promotion Council working group meetings, biannual principal meetings, and periodic Under Secretary-level meetings. • Engage in regular meetings with key individuals and agencies. 	<ul style="list-style-type: none"> • Dedicated newsletter series created, launched, and distributed monthly beginning 11/1/13 • Monthly updated distributed beginning 1/15/14 • Participation in Federal meetings, including the Travel Promotion Council, the Travel & Tourism Advisory Board, the Interagency Policy Committee (White House), and other relevant groups scheduled by 12/1/13 • Weekly staff-level calls with key agencies held beginning 1/15/14 • Monthly lunch meetings between Brand USA's CEO and key federal principals beginning 2/1/14
<p>4. Significantly expand Brand USA's strategy for communicating entry policies and procedures.</p>	<ul style="list-style-type: none"> • Create, display, and promote a video that educates the traveler on the ESTA application process and on TSA processes and screening requirements. • Create, display, and promote a video explaining the visa application process. • Create, display, and promote a video that educates the traveler on how to correctly and quickly go through the customs process. 	<ul style="list-style-type: none"> • RFP for production of all videos issued by 11/15/13 • Videos finalized by 4/1/14 • Videos promoted via website, social media, government partners, and international representation firms by 6/1/14



Align and Leverage the Collective Force of the Industry

STRATEGIES	TACTICS	GOALS
<p>1. Create and execute a strategy that communicates and demonstrates the overwhelming value that Brand USA brings to powering the U.S. economy.</p>	<ul style="list-style-type: none"> • Develop a guide book for senior management to make sure key geographic markets in the U.S. are included in various programs and initiatives. • Develop U.S. based initiatives (viral/social) which advance the cause of international tourism to the U.S. within the parameters of the Travel Promotion Act. • Create an “Across the USA” value of tourism testimonial video, that can be cut in a number of ways for different purposes (i.e., geographical, programmatic, and travel segment). • Apprise staff on an educational basis what others are doing to promote reauthorization of Brand USA. 	<ul style="list-style-type: none"> • Book created by 2/1/14 • Plan established by 3/1/14 • Video created by 4/1/14 • Reauthorization achieved by 9/30/14
<p>2. Ensure the industry has easy access to information on Brand USA’s impact on the U.S. economy.</p>	<ul style="list-style-type: none"> • Create a quarterly industry report card to send to influential industry leadership to be used in their communications. • Provide online access to top influencers. 	<ul style="list-style-type: none"> • Quarterly industry report card developed and implemented by 7/1/14 • Online access established by 8/1/14



Align and Leverage the Collective Force of the Industry

STRATEGIES	TACTICS	GOALS
<p>3. Build engagement, trust, and advocacy for Brand USA through stakeholder communications and value-added research.</p>	<ul style="list-style-type: none"> Enhance eNewsletter series to include an umbrella newsletter augmented with communications customized for partners/sponsors, the travel trade, government stakeholders, and the media. Develop an editorial calendar of communications opportunities. Generate case studies for partner programs to support business development. Execute co-operative Market Intelligence Program. Establish a plan to work with academic institutions to support the next generation of marketing professionals. 	<ul style="list-style-type: none"> Targeted newsletter series launched by 2/1/14 Delivery of editorial calendar to partners initiated by 12/1/13 At least three case studies generated by 1/15/14 Plan established by 2/1/14 Relationships with at least three university hospitality programs established by the end of FY14
<p>4. Measure industry stakeholder engagement and satisfaction.</p>	<ul style="list-style-type: none"> Develop and launch a stakeholder engagement survey. 	<ul style="list-style-type: none"> Survey implemented by 1/15/14 to establish baseline and then conducted two times per year on an ongoing basis
<p>5. Establish a communications advisory group to engage the industry and partners and maximize our collective efforts to increase awareness of the USA as a premier travel destination.</p>	<ul style="list-style-type: none"> Define mission and strategy of advisory group. Identify and invite key industry influencers to participate on communications advisory committee. Hold quarterly meetings/calls. 	<ul style="list-style-type: none"> Definition work completed by 12/15/13 Invitations extended by 1/15/14 Initial communications advisory group meeting/call held by 4/1/14
<p>6. Establish a community relations/corporate social responsibility (CSR) strategy that enables and engages strong industry participation.</p>	<ul style="list-style-type: none"> Develop CSR strategy. Communicate and roll out CSR program at IPW. 	<ul style="list-style-type: none"> CSR strategy developed by 2/1/14 CSR program introduced at IPW in Chicago in April 2014



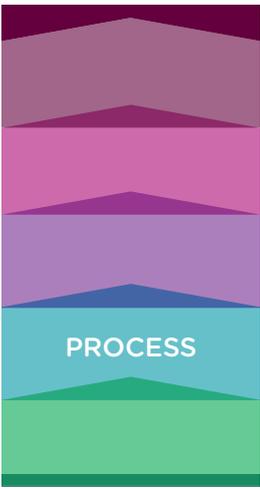
Develop Integrated Planning and Best Practices for all Programs and Initiatives

STRATEGIES	TACTICS	GOALS
<p>1. Develop and implement a yearly planning schedule and process that ensures timely and productive flow of business.</p>	<ul style="list-style-type: none"> Issue a planning calendar one year out that incorporates data collection, plan development, and communication to all stakeholders. Develop master outline for Business Plan for use by all Brand USA team members. 	<ul style="list-style-type: none"> Calendar developed each year by 7/1/14 for following fiscal year Outline developed and issued each year by 1/15/14
<p>2. Create a system for the collection and evaluation of best practices. Incorporate these best practices into a culture of continuous improvement.</p>	<ul style="list-style-type: none"> Research DMAP certification criteria and assess current Brand USA situation. Create ongoing process for best practice collection. Implement communication plan for dissemination of best practice knowledge. Apply for DMAP certification. 	<ul style="list-style-type: none"> Research and assessment completed by 1/15/14 Process established by 1/15/14 Plan by 4/15/14 DMAP certification as a best practice DMO earned by 9/30/14 (pending process time)
<p>3. Map and optimize our current internal business processes and procedures.</p>	<ul style="list-style-type: none"> Identify core vs non-core processes. Create mapping teams and assessment plan. Map each process and make recommendations for improvement. 	<ul style="list-style-type: none"> Identification of processes completed by 11/15/13 Teams and plan established by 11/15/13 Mapping complete by 2/1/14 and improvements implemented by 3/1/14
<p>4. Create standardized programs and products that will enable operations to efficiently fulfill the needs of our partners.</p>	<ul style="list-style-type: none"> Identify repeatable programs and agreements that move easily and quickly through the process. Create simple, effective, and easy to follow procedures as part of the process mapping and improvement program. 	<ul style="list-style-type: none"> Programs identified and developed by 1/15/14 Processing mapping and improvements completed by 3/1/14
<p>5. Create a process for screening and evaluating proposed programs to determine relevance and potential ROI.</p>	<ul style="list-style-type: none"> Establish criteria for evaluating potential programs. Create a review committee (with representatives from Marketing, Communications, and Operations). Schedule annual calendar of committee meetings. 	<ul style="list-style-type: none"> Criteria established by 11/1/13 Committee and agenda determined by 11/1/13 Calendar for remainder of FY14 established by 11/1/13



Define, Clarify and Streamline Compliance Processes

STRATEGIES	TACTICS	GOALS
<p>1. Establish compliance across all business practices.</p>	<ul style="list-style-type: none"> Finalize policies (Travel and Procurement) and associated procedures – incorporating staff feedback where possible. Train employee base. Provide user friendly resources to support staff understanding and sign-off. Create and implement Contract Management System. 	<ul style="list-style-type: none"> Policies finalized by 3/1/14 Compliance training program and schedule established by 12/1/13 Program implemented for current employees by 11/1/13 Program incorporated into new employee orientation by 11/1/13 100% compliance to policies and procedures achieved for the year Contract Management System implemented by 12/15/13
<p>2. Build operational ease and efficiency.</p>	<ul style="list-style-type: none"> Streamline and shorten processing time for all procedures (accounts payable, accounts receivable, and ESTA submissions). Create improvement plan to reduce average number of ESTA filing days (cycle time from receipt of contribution to ESTA filing to receipt of funds) including adding provisions in contractual service level agreements (processing time) for all vendors. Create plan to reduce average time to process/pay invoices and expense claims. Develop action plan for overdue ESTA payments (30+ days with the Department of Commerce). 	<ul style="list-style-type: none"> Milestones for ESTA filings established and tracking against process time between each milestone initiated by 12/1/13 Plan created by 2/1/14 with marked percentage decrease in cycle time achieved by the end of FY14 Reduction in average time to process/pay invoices to 30 days or less and to process/pay employee expenses to 15 days or less Action plan developed and implemented by 2/1/14
<p>3. Formalize process for updating in-kind policies and procedures.</p>	<ul style="list-style-type: none"> Draft recommended process for updates and review with the Department of Commerce. Implement final process. 	<ul style="list-style-type: none"> Recommendations drafted by 11/1/13 and reviewed with the Department of Commerce by 11/15/13 Final process implemented by 1/15/14



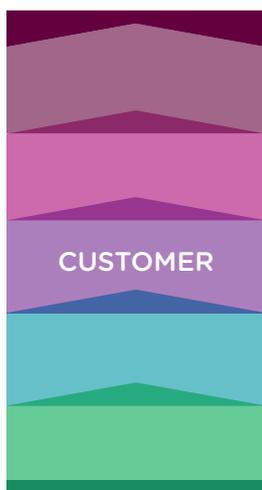
Continually Optimize Technology Resources and Systems

STRATEGIES	TACTICS	GOALS
<p>1. Develop technology systems that streamline and deliver information in a timely, accurate manner.</p>	<ul style="list-style-type: none"> • Upgrade data communications bandwidth and implement monitoring tools. • Upgrade accounting software based on needs analysis (performed under BDO contract). • Implement Anybill accounts payable software for increased transparency and efficiency and to ensure adherence to all contract and procurement compliance requirements. 	<ul style="list-style-type: none"> • 95% of planned technology resources implemented on time and within budget by the end of FY14 • Accounting software implemented by 9/30/14 • Accounts payable software implemented by 3/30/14
<p>2. Develop Customer Relationship Management system (CRM) to enable us to document, track, and manage communication and program execution with our partners.</p>	<ul style="list-style-type: none"> • Conduct analysis of suitable systems (performed under Digital DNA contract). • Select best identified CRM package for trial (performed under Digital DNA contract) for trial. • Conduct RFP with criteria determined in suitability analysis. • Implement selected solution with initial capabilities. 	<ul style="list-style-type: none"> • Summary of findings produced by 8/31/14 • Plan created and 14-day trial using small group and test data conducted by 12/1/13 • RFP issued and selection of vendor presented for budget consideration by 9/30/14 • CRM software implemented by 12/31/13
<p>3. Improve help desk support.</p>	<ul style="list-style-type: none"> • Analyze user needs to identify gaps in capabilities and response time. • Implement software to catalog solutions and create knowledge base. • Identify regularly needed small equipment and keep inventory. • Conduct RFP for hardware procurement. • Implement regular training seminars. 	<ul style="list-style-type: none"> • Gaps identified by 11/15/13 • Help desk software tool implemented by 12/31/13 • Needs identified and inventory created by 12/31/13 • Hardware procurement RFP completed by 12/15/13 • Seminar program initiated by 2/1/14
<p>4. Implement IT Planning for future.</p>	<ul style="list-style-type: none"> • Create long-term hardware budget with replacement cycle. • Create Disaster Recovery and Continuity of Operations plans. 	<ul style="list-style-type: none"> • Budget and plan presented by 7/1/14 (one month prior to development of FY15 budget) • Plans developed by 6/1/14
<p>5. Reduce costs and increase efficiencies and brand consistency by developing and expanding online resources for employees and suppliers to access brand assets, stationary and promotional products.</p>	<ul style="list-style-type: none"> • Enhance selection of existing stationary templates and promotional products programs. • Create a comprehensive set of brand standards by developing corporate brand standards and refining consumer brand standards for online and print application. • Expand our online fulfillment capability with inventoried items expensed only at time of fulfillment. 	<ul style="list-style-type: none"> • Selection upgraded by 1/15/14 • Comprehensive set of standards introduced by 2/1/14 • Online fulfillment capability expanded and launched by 3/1/14



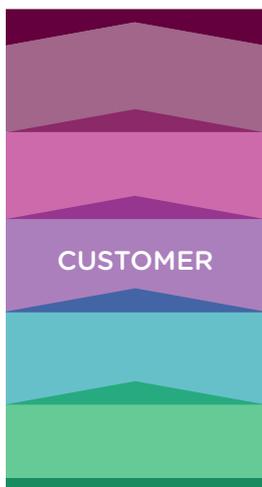
Align our Programs to Ensure Ongoing Support of the National Travel and Tourism Strategy

STRATEGIES	TACTICS	GOALS
<p>1. Expand collaboration and leadership of all initiatives related to National Travel & Tourism Strategy.</p>	<ul style="list-style-type: none"> Equip representation firms with budget and guidance to develop yearly work plans with embassies/consulates. Develop tools kits to include Brand USA collateral, logos, and briefing materials that can be distributed through the Main Street resource management system for Federal partners. Develop coordinated approach to promoting Federal lands and waters through Brand USA channels; support National Park Service centennial activities with the Department of the Interior. Develop editorial calendar that integrates key recreation.gov experiences each month. Provide updates to the Travel Promotion Council to be included in quarterly report to principals and the White House. Coordinate global collaborative projects (digital and/or thematic programs) through Brand USA's corporate office. 	<ul style="list-style-type: none"> Work plans with the embassies that includes three to four key activities by established by 2/1/14 Tool kits distributed to all 75 members of the Commercial Service Global Travel and Tourism Team and to principals of the State Department by 2/1/14 Plans established with respective Federal agencies by 2/1/14 Editorial calendar delivered by 1/15/14 Report format and score card developed by 1/15/14 and report delivered by the 15th of each month thereafter Plan and KPIs for global collaborative efforts developed by 1/15/14
<p>2. Assess and report the impact of Brand USA on a national scale.</p>	<ul style="list-style-type: none"> Issue RFP and select vendor to calculate attributable growth in international arrivals and expenditure, as well as the resulting economic impact and the creation of jobs. 	<ul style="list-style-type: none"> Research and related communications for release completed by 1/15/14 Percentage of achievement of Travel Promotion Council shared annual objectives (submitted to the Department of Commerce on 8/1/14)



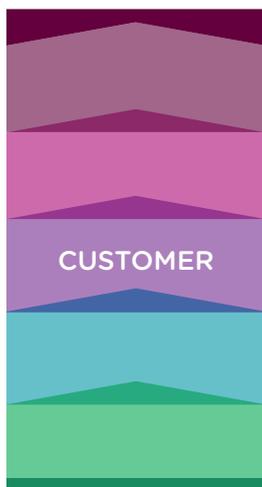
Develop and Package Compelling Value-Added Programs and Campaigns

STRATEGIES	TACTICS	GOALS
<p>1. Participate in a high-value, cost effective series of trade shows in highly productive feeder markets.</p>	<ul style="list-style-type: none"> • Develop consistent innovative design for events. • Develop activities that will create meaningful engagement with in-market buyers. • Develop high value sponsorship opportunities for exhibitors. 	<ul style="list-style-type: none"> • One common design established by 1/15/14 • Trade show engagement plan developed by 12/1/13 • Enhanced sponsorship opportunities developed by 3/1/14
<p>2. Offer value-added missions and familiarization (FAM) trips to our partners for their participation.</p>	<ul style="list-style-type: none"> • Develop sales mission for each market where Brand USA has international representation firms. • Create FAM trips for markets where Brand USA has international representation firms. 	<ul style="list-style-type: none"> • One mission, per year, per market conducted in FY14 • Two FAM trips per year from highest priority international markets conducted in FY14
<p>3. Create opportunities for full industry participation, including large and small organizations, as part of a formal Beyond the Gateway strategy.</p>	<ul style="list-style-type: none"> • Interview smaller CVBs/DMOs to gather information regarding needs. • Develop programs that best meet their needs. 	<ul style="list-style-type: none"> • Ongoing beginning 10/1/13 • Full package for smaller partners developed by 1/15/14
<p>4. Develop success metrics for all programs and communicate the results to stakeholders</p>	<ul style="list-style-type: none"> • Engage OTA/tour operator partners to develop value-add propositions to be included as a call to action in the majority of advertising. • Create a database of success stories as communicated directly by our partners as to how Brand USA adds value and makes a difference. 	<ul style="list-style-type: none"> • Spending metrics for at least 50% of our spend established by 2/1/14 • Database of success stories to use as examples established by 12/1/13
<p>5. Create sponsorship opportunities for non-travel companies.</p>	<ul style="list-style-type: none"> • Use our IMAX partnership to solicit non-travel sponsors who want to support the Brand USA effort. • Develop a retail strategy that enhances our value with DMO and CVB partners and provides new participation opportunities. • Expand our strategy for entertainment and sports branded content and events. 	<ul style="list-style-type: none"> • \$10 million in sponsorships committed by 9/1/14 • Strategy in place by 10/1/13 and first retail partner obtained by 1/31/14 • Recommended next steps established by 11/1/13
<p>6. Leverage new airline route development by airlines for promotional opportunities into gateway and secondary markets.</p>	<ul style="list-style-type: none"> • Effectively engage in airline conferences like Routes Development Congress. • Create relationships with foreign carriers. • Develop promotional opportunities between airline, airports, and destinations. 	<ul style="list-style-type: none"> • Routes Congress attendance in October 2013 and February 2014 (in San Salvador) • Priorities and plan for efficient allocation of time established by 12/1/13 • Three promotional opportunities deployed by 9/30/14



Develop and Package Compelling Value-Added Programs and Campaigns

STRATEGIES	TACTICS	GOALS
<p>7. Incentivize partners to invest in emerging markets while reducing spend in mature markets (e.g. shift from U.K. to China, South America).</p>	<ul style="list-style-type: none"> Conduct an analysis of reducing matching funds in mature markets. Offer special incentives for emerging market programming. 	<ul style="list-style-type: none"> Recommendations drafted by 11/30/13
<p>8. Fully implement the Brand USA Media and Travel Networks powered by TravMedia and TravTrade.</p>	<ul style="list-style-type: none"> Establish value-added elements, sponsorship opportunities, and partnership programs for these platforms. Ensure all international representation firms are utilizing the platforms. Determine shows to execute the online appointment scheduling capability. 	<ul style="list-style-type: none"> Opportunities and value-added elements established by 12/1/13 International representation participation in the media platform activated by 11/1/13 Shows where we will launch scheduling capability selected by 2/1/14
<p>9. Maximize effectiveness and efficiency of marketing expenditures.</p>	<ul style="list-style-type: none"> Provide intelligence to prioritize target markets and to optimize consumer segmentation, media, and channel mix for the appropriate travel lifecycle phase. Drive innovation and improvement by testing new media channels and technologies. Standardize programming where appropriate to create off-the-shelf co-op opportunities that are scalable. 	<ul style="list-style-type: none"> Market prioritization recommendations delivered by 10/1/13 At least three new media/technology partners evaluated and tested by 1/15/14 First standardized product by 12/31/13
<p>10. Develop market-based co-op programs that will generate interest and spending among existing and new partners, while lowering the cost to Brand USA.</p>	<ul style="list-style-type: none"> Develop and implement solutions which can be offered that are comparable in total value vs previously expected percentages. Co-op nearly all spending. Ensure strategic leadership and management of international representation spending of co-op dollars. Integrate Brand advertising with LOA partner-directed advertising to bring efficiency and improved messaging. Engage non-travel/corporate/individual investment. 	<ul style="list-style-type: none"> Lower overall cost to 10% over the next 24 months while maintaining total value to partners Percentage increase in co-op program participation Partner program retention rate Five new partners outside for the travel industry signed by the end of FY14



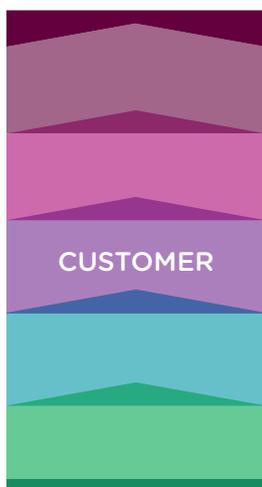
Articulate and Demonstrate a Strong Value Proposition for Each Stakeholder Group

STRATEGIES	TACTICS	GOALS
<p>1. Craft and communicate written value propositions for our eight key stakeholder groups that differentiate Brand USA from other entities</p> <ul style="list-style-type: none"> • Employees • Partners • Suppliers/Vendors • Travel Trade • Industry Stakeholders • Government Stakeholders • Consumers • The American Public 	<ul style="list-style-type: none"> • Develop written value propositions. • Create stakeholder listening posts for feedback. • Communicate the plan for each stakeholder group. • Develop and implement simple, short value survey for each stakeholder group. Survey two times annually. 	<ul style="list-style-type: none"> • Value propositions written by 1/15/14 • Plan for advisory committees established by 12/15/13 • Communication plan developed by 2/1/14 • Brand USA Value Index (aggregated results of five simple surveys) developed by 3/1/14
<p>2. Equip Brand USA team members to communicate consistently and effectively.</p>	<ul style="list-style-type: none"> • Develop elevator speech. • Develop and continually update FAQs for Brand USA and stakeholder use. • Establish and execute a presentation training and media training program (designate certified presenters and spokespeople). • Enhance core presentation materials—regularly updated and housed in a central location in order to provide easy to access from anywhere. • Build an online presentation builder. 	<ul style="list-style-type: none"> • Elevator speech and FAQs by developed by 1/15/14 • Presentation and media training commenced by 2/1/14 • Ungraded presentation materials developed by 1/15/14 • Presentation builder activated by 3/1/14
<p>3. Benchmark current program offerings against articulated value propositions and adjust as needed for alignment.</p>	<ul style="list-style-type: none"> • Screen all programs pre-implementation against value proposition. • Conduct gap analyses to determine where action is needed. 	<ul style="list-style-type: none"> • Ongoing, beginning 12/15/13 • Ongoing, beginning 12/15/13
<p>4. Ensure Brand USA's presence at influential industry shows (i.e., Governor's Conferences, etc.).</p>	<ul style="list-style-type: none"> • Identify influential conferences and shows. • Create a proactive communications campaign to place the right Brand USA speakers present at the right shows. • Provide video messages from Brand USA for shows where we do not have a physical in-person presence. • Provide core messaging about Brand USA for conference leaders to share at each show. • Develop a speakers bureau and conference strategy to maximize Brand USA's presence at influential shows. 	<ul style="list-style-type: none"> • Schedule for trade show attendance developed by 12/1/13 • Plan developed by 11/1/13 • Video messages created by 1/15/14 and updated as needed • Message sheet produced by 10/1/13 • Strategy developed by 2/1/14
<p>5. Develop and deliver compelling messages to international travelers that improve the perceptions of the United States and increases intent to visit.</p>	<ul style="list-style-type: none"> • Evolve current consumer brand messaging to include voices from across the USA inviting the world to visit us. Evolve the message to go beyond what America looks like to what America is. 	<ul style="list-style-type: none"> • Enhanced messaging developed and tested for accuracy and effectiveness by 2/1/14



Articulate and Demonstrate a Strong Value Proposition for Each Stakeholder Group

STRATEGIES	TACTICS	GOALS
<p>6. Effectively communicate corporate goals and results.</p>	<ul style="list-style-type: none"> Operationalize our Strategy Map and Balanced Score Card and begin to use as the framework for all stakeholder communications. 	<ul style="list-style-type: none"> Communication and utilization plan developed by 12/1/13
<p>7. Enhance the quality of content and presentations for the organization's board and industry meetings in order to provide information most relevant to stakeholders and the public.</p>	<ul style="list-style-type: none"> Identify industry best practices. Research programs and systems to efficiently facilitate board and industry meetings (i.e., video conferencing, board book development, etc.). 	<ul style="list-style-type: none"> Best practice search completed by 1/15/14 Recommendation for enhancements drafted by 2/1/14
<p>8. Generate consistent performance metrics across all marketing promotional activity.</p>	<ul style="list-style-type: none"> Establish sources and procedures for gathering metrics for each marketing department and initiative. Staff up/select contractors to execute reporting. Create and execute a plan of regular distribution to internal and external stakeholders. 	<ul style="list-style-type: none"> All internally sourced metrics in place by 10/1/13 All externally sourced metrics in place by 1/15/14 At least 1 webinar held per quarter during FY14
<p>9. Implement metrics to measure Brand USA's media outreach efforts.</p>	<ul style="list-style-type: none"> Develop and distribute RFP to leading media measurement firms. Select a media measurement firm. Identify key indicators and frequency of reporting (to include ability to effectively measure media impressions and sentiment for Brand USA, USA tourism, and Discover America) 	<ul style="list-style-type: none"> RFP distributed by 1/15/14 Firm selected by 2/15/14 Indicators and frequency of reporting established by 3/15/14
<p>10. Track all programs, activities, and successes by international market, by domestic market, by partner, by segment, and by program type.</p>	<ul style="list-style-type: none"> Develop interactive heat map of USA showing consumer and trade activities that can be updated frequently (potentially in real time) with the ability to run reports on activities by state. Complete full set of state/ programmatic fact sheets - covering 50 states, the District of Columbia, and the five territories. Collaborate with key partners to create high-quality, relevant, and accurate content. Make available online, on-demand for each stakeholder group. 	<ul style="list-style-type: none"> Map developed by 3/1/14 Fact sheets completed by 2/1/14 Ongoing collaboration Available online by 2/15/14
<p>11. Enhance the quality and content of organizational reporting materials, including the Annual Report (to be submitted to the Department of Commerce for transmittal to Congress by May 15 as required by the Travel Promotion Act).</p>	<ul style="list-style-type: none"> Develop timeline for tracking and compiling required content on a monthly basis and hold regular update meetings. Create an online in development version (updated on a quarterly basis) and deliver both the online and PDF version to the Department of Commerce. 	<ul style="list-style-type: none"> Timeline developed by 12/1/13 Annual Report submitted to the Department of Commerce by 5/1/14



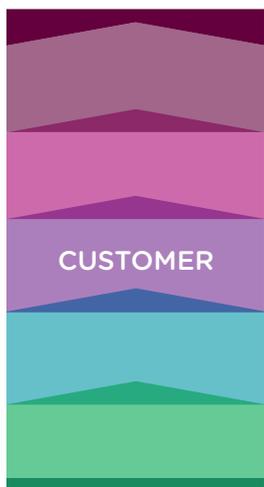
Create Raving Fans of the USA

STRATEGIES	TACTICS	GOALS
<p>1. Create a domestic engagement initiative to evolve brand message from showing the product of America to giving a voice to the welcoming spirit of America.</p>	<ul style="list-style-type: none"> • Conduct research in local markets to gauge the relevance and importance of American testimonials and invitations to visit the United States. • Create the business case for the initiative. • Create social programs to gather appropriate content. 	<ul style="list-style-type: none"> • Testing of domestic ambassador program variations completed by 1/15/14 • Deadline for business case for the initiative to be determined based on research results (target: 2/1/14)
<p>2. Launch an updated campaign with fully integrated global messaging with a central campaign idea for FY14.</p>	<ul style="list-style-type: none"> • Provide channel specific guidelines for brand and call to action messaging. • Develop a value system to clearly communicate the objective and next step call to action required by tactic/market. • Align tactics to support the central idea from each market and develop market-specific tool kits. 	<ul style="list-style-type: none"> • Campaign that guides audiences through a measurable and actionable set of touchpoints developed (and executions without call to action eliminated) by 3/1/14 • ROI/response measures for all touchpoints developed (with each consumer media touchpoint actionable) by 12/1/13
<p>3. Utilize new market prioritization model to develop country/market-specific media plans that align with market potential.</p>	<ul style="list-style-type: none"> • Determine & build communications plan & optimal budget per market. 	<ul style="list-style-type: none"> • Marketing prioritization and budget allocation for FY14 completed by 10/1/13 • Creative refresh to include market-specific nuances to existing brand campaign; completed by 3/1/14
<p>4. Develop a system to measure value and performance improvements.</p>	<ul style="list-style-type: none"> • Develop ROI and corresponding KPIs for each market (launch vs maintenance). • Track visitation to the United States from each market in which we have a brand presence. 	<ul style="list-style-type: none"> • Pre- and post-wave results that show campaign awareness at 15% or higher • Improvement in image and perceptions of the United States as a destination of +3 points or more
<p>5. Develop creative messaging and tools that guide target audiences through a measurable and actionable set of touchpoints by market.</p>	<ul style="list-style-type: none"> • Define each customer touchpoint and stage of the travel lifecycle. • Ensure each customer touchpoint has a clear Call To Action (CTA). • For each CTA, build appropriate tracking methods to measure engagement. 	<ul style="list-style-type: none"> • CTAs (and corresponding content) for each marketing channel developed by 1/15/14



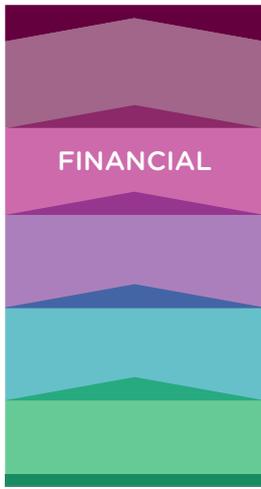
Create Raving Fans of the USA

STRATEGIES	TACTICS	GOALS
<p>6. Redevelop/update all digital tools into a single integrated user experience within each market.</p>	<ul style="list-style-type: none"> • Determine digital touchpoint value by market. • Integrate website tools and social media channels into a single experience. • Evaluate performance of existing tools in market by potential value and measurability. • Eliminate the use of underperforming channels and acquire new channels determined to be critical in key international markets. 	<ul style="list-style-type: none"> • Social media activity to all in-country websites integrated by 3/15/14 in top-tier markets and by 6/15/14 in second-tier markets • 20% annual increase in combined global site views, 25% annual increase in time on site, and 10% annual increase in social media engagement by the end of FY14 • Percentage increase in positive social sentiment while maintaining 90% or better positive social sentiment related to campaign by the end of FY14 • Top-tier countries to focus customization of web and social channels by country identified by 4/15/14 and customization completed by 6/15/14 • Underperforming channels identified and eliminated by 1/15/14 • Integrated dashboard of metrics mapping user experience through channels delivered by 12/15/13
<p>7. Become a content channel that fosters and delivers highly engaging content (owned, shared, and syndicated) to partners and Brand USA owned channels.</p>	<ul style="list-style-type: none"> • Develop content incentive program for influencers centered on ongoing promotions. • Launch consumer user generated content campaign each quarter that focuses on content creation consolidation. • Source and establish a partner for third party content that can be syndicated and localized to various U.S. markets. 	<ul style="list-style-type: none"> • In-market influencer and user-generated content initiative launched by 11/1/13 and conducted three times per year thereafter • Partner programs for country specific content development beyond current single offering launched by 12/15/13 with additional programs launched by 3/15/14 • Content value reporting dashboard built and launched by 12/15/13 • Education initiative to provide internal and partner understanding of content value launched by 10/15/13 • Media executions with content at the center launched by 4/15/14 • 25% increase in time on site and 10% increase in engagement with social content achieved by the end of FY14 • 20% reduction in bounce rate on website achieved by the end of FY14



Create Raving Fans of the USA

STRATEGIES	TACTICS	GOALS
<p>8. Deliver tools and platforms that support partner programs sold / launched and are fully measurable.</p>	<ul style="list-style-type: none"> • Provide an impartial product and destination search toolset for web audience. • Build and deliver brand measurable campaigns that provide demonstrated overall value to partners. • Build and maintain process and resources for translation, content development, and delivery of sold assets to partners. 	<ul style="list-style-type: none"> • Meta-search functionality across global social and digital channels established by 3/15/14 • Ability for private brands to participate within owned Brand USA properties developed by 12/15/13 • All media placed via digital channels measured and optimized—resulting in response rate improvement of 20% by the end of FY14 • Updated campaigns delivered via Ad network, Google and social channels launched by 11/15/13 • 20% increase in year-over-year site traffic for combined web assets by the end of FY14 • Incremental increase in global combined fan base of five million consumers and increase in engagement rates of 10% by the end of FY14 • Media reporting integrated into dashboard process by 12/15/13
<p>9. Make our “Made in America” suite of products available online to consumers throughout the world.</p>	<ul style="list-style-type: none"> • Expand products and availability with an eCommerce site and develop a marketing communications plan to support it. 	<ul style="list-style-type: none"> • Site and plan launched by 3/1/14



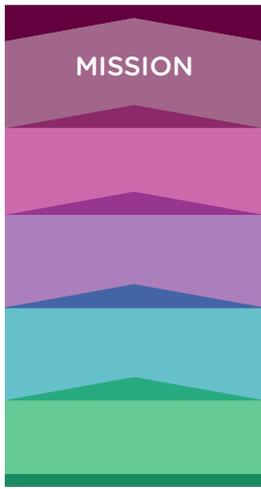
Maximize the Match

STRATEGIES	TACTICS	GOALS
<p>1. Increase cash contributions.</p>	<ul style="list-style-type: none"> • Create a booster program for diversified participation. • Deploy and maximize in-market sales team. • Create non-travel and high net-worth individual sponsorship plans. • Develop products that can be sponsored by new partners. 	<ul style="list-style-type: none"> • Program developed and launched by 2/1/14 • Bonus compensation program established for all sales people by 1/15/14 • Commitments from five new partners in key categories outside of the travel industry obtained by 9/30/14 • Products developed by 11/1/13 • 10% annual increase in cash contributions achieved by the end of FY14
<p>2. Increase pipeline of in-kind contributions.</p>	<ul style="list-style-type: none"> • Tap into new sources of contributions using the IMAX model: film, television, and music. • Require most media outlets receiving funds from Brand USA and as many suppliers/vendors as possible to make in-kind contributions as a requirement for doing business with us. 	<ul style="list-style-type: none"> • 5% increase in the net in-kind pipeline by the end of FY14 • Requirement implemented by 10/1/13
<p>3. Develop a Customer Relationship Management system (CRM) to enable us to document, track and manage our communications with and commitments to our partners.</p>	<ul style="list-style-type: none"> • Conduct analysis of suitable systems (performed under Digital DNA contract). • Select best identified CRM package for trial (performed under Digital DNA contract) for trial. • Conduct RFP with criteria determined in suitability analysis. • Implement selected solution with initial capabilities. 	<ul style="list-style-type: none"> • Summary of findings produced by 8/31/14 • Plan created and 14-day trial conducted using small group and test data by 9/30/14 • Conduct RFP and present selection for budget consideration by 9/30/14 • CRM software implemented by 12/31/13



Create Sustainable Funding Sources

STRATEGIES	TACTICS	GOALS
<p>1. Create compelling sponsorship opportunities with emotional payoff for high net-worth individuals.</p>	<ul style="list-style-type: none"> Identify and engage outside experts with existing target relationships. Create a priority list of potential high net-worth individuals. Developed a core engagement pitch that clearly presents the compelling value of opportunities for potential sponsors. Create communication tools for selling. 	<ul style="list-style-type: none"> Outside expertise contracted by 10/1/13 Priority list created by 10/31/13 Core pitch developed by 11/1/13 immediately followed by sales calls Selling tools created by 12/15/13 Commitments from three “Great Patriot” sponsors obtained by 9/30/14 Percentage increase in unrestricted cash contributions
<p>2. Diversify our partner and contributions base by branching out to non-travel corporate sponsors.</p>	<ul style="list-style-type: none"> Create a priority list of potential non-travel sponsors, with an eye for IMAX participation. Develop a core programs/ solutions pitch that clearly and accurately communicates value to potential sponsors. Create communication tools for selling. 	<ul style="list-style-type: none"> Priority list created by 11/1/13 Core pitch developed by 11/1/13 immediately followed by sales calls Selling tools created by 11/15/13 Five new partners/sponsors outside of travel industry by 9/30/14 Percentage increase in number of cash and in-kind partners



Drive Visitation and Spend to the USA

STRATEGIES	TACTICS	GOALS
<p>1. Leverage and maximize every opportunity we have to promote the USA as the world's premier travel destination.</p>	<ul style="list-style-type: none"> Plan well and follow the plan. 	<ul style="list-style-type: none"> Attributable increase in visitation Attributable increase in spend
<p>2. "Market the Welcome" with messaging that permeates all of our efforts to tell the world that Americans want international travelers to visit us.</p>	<ul style="list-style-type: none"> Evolve our current messaging and person-to-person engagement level. 	<ul style="list-style-type: none"> Attributable increase in visitation Attributable increase in spend
<p>3. Utilize Brand USA's market selection model to optimize our spending in the markets with highest potential ROI.</p>	<ul style="list-style-type: none"> Establish a baseline of current combined ROI across all Brand USA spend. Track and measure future ROI for visible progress. 	<ul style="list-style-type: none"> Baseline established by 1/15/14 5% improvement in combined ROI by the end of FY14 (pending required time to evaluate program)
<p>4. Inspire travel to the United States by promoting experiences and events that compel travelers to plan and book their travel.</p>	<ul style="list-style-type: none"> Create the United States' first-ever comprehensive events calendar. Provide partners the opportunity to upload/manage content to promote the vast and unique array of experiences available throughout the year in destinations across the United States. Expand the content and number of markets where the USA Discovery destination training tool for the travel trade is offered. 	<ul style="list-style-type: none"> Calendar established and testing initiated by 2/1/14 USA Discovery tool introduced in two new markets by the end of FY14



Market Profiles



Market Profile: Australia

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	62%
Local Lifestyle	58%
Shopping	47%
Visiting Friends and Relatives	40%
Dining/Gastronomy	39%

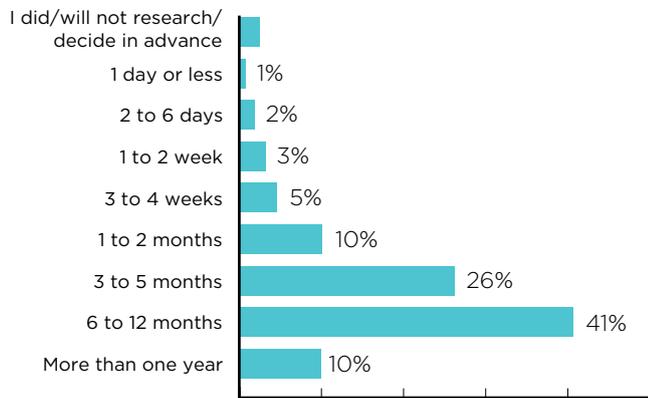
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	62%
Friendly	58%
Adventurous	47%
Energetic	40%
Trendy	39%

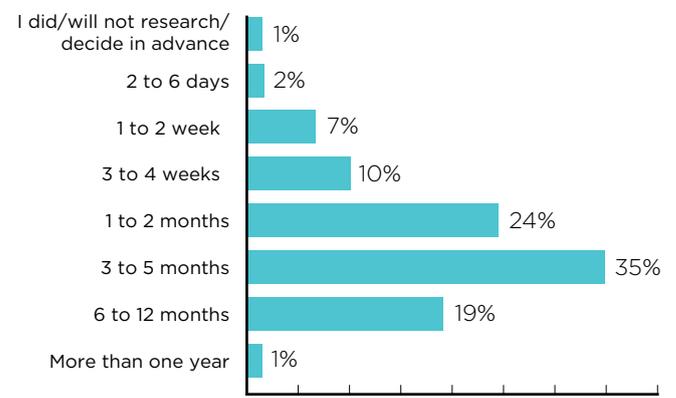
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	66%
Personal Recommendations from Family and Friends	42%
Information in Printed Travel Guidebooks	27%
Personal advice from travel professionals/travel agents	26%
Printed publications, articles and brochures	25%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Australia would most like to visit



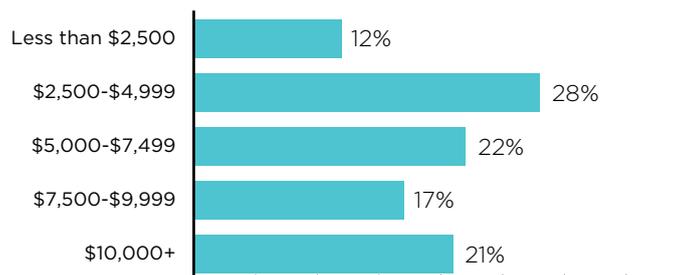
2012 Arrivals	2012 Spending
1.12 million	\$5.4 billion
+8% v 2011	+10% v 2011
Rank: 10	Rank: 8

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

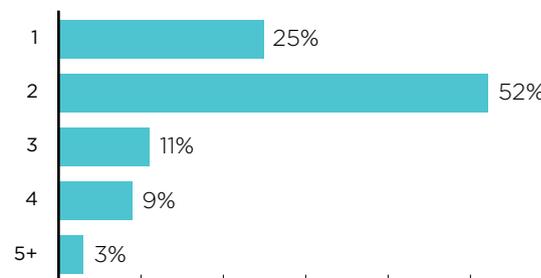
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$7,510.23	\$6,230.70



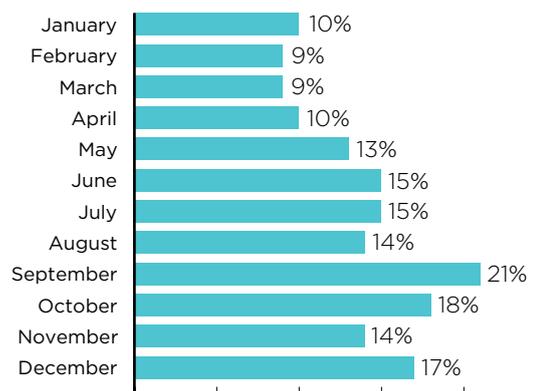
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



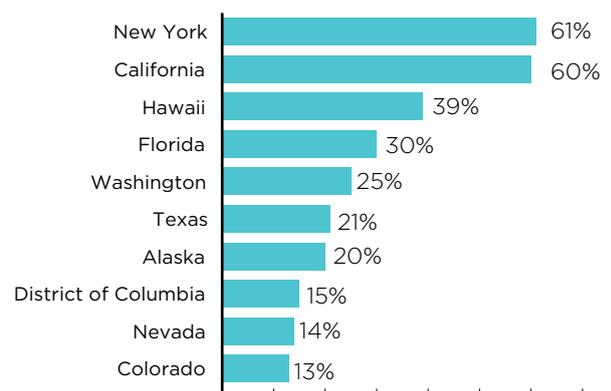
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



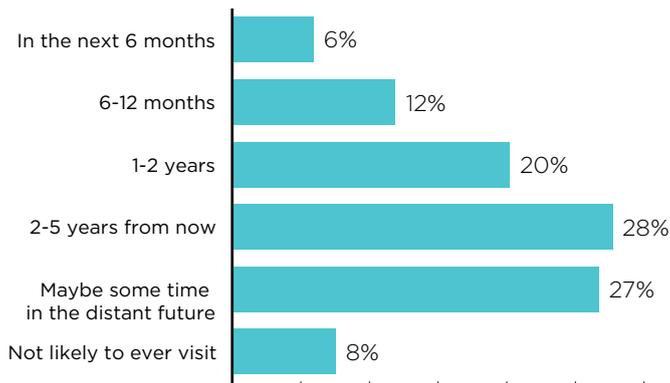
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



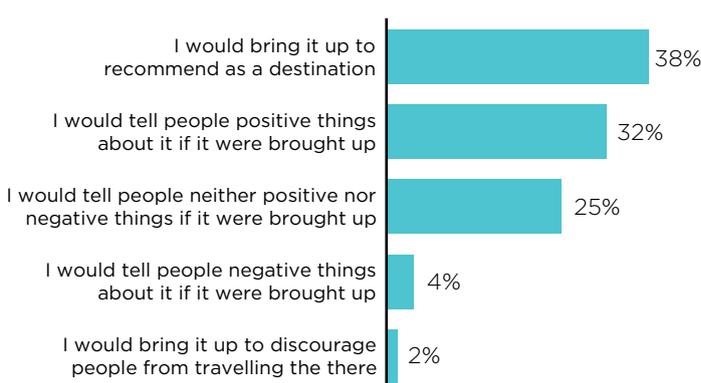
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: Brazil

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Urban attractions	48%
Shopping	43%
Dining/gastronomy	42%
Historical/archaeological attractions	42%
Theme parks	36%

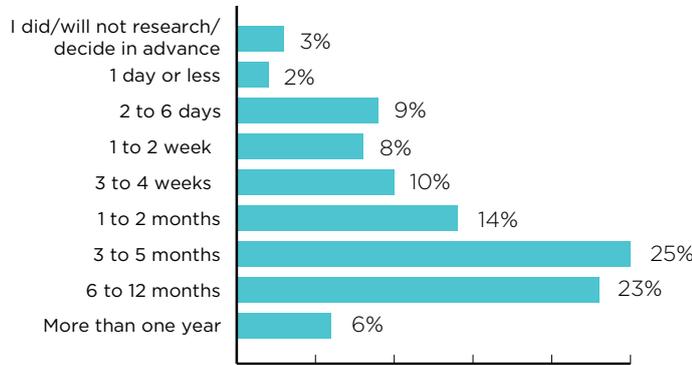
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Top 5 Strongest Impressions of the USA

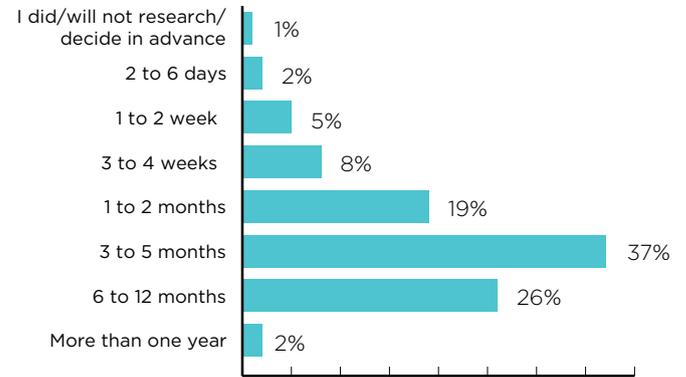
Impression	% Selected
Trendy	65%
Sophisticated	49%
Diverse	47%
Energetic	40%
Adventurous	38%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Personal recommendations from friends/family	42%
Websites via computer	39%
Printed publications, articles or brochures	37%
Information in printed travel guidebooks	24%
Online advertising/email	24%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Brazil would most like to visit

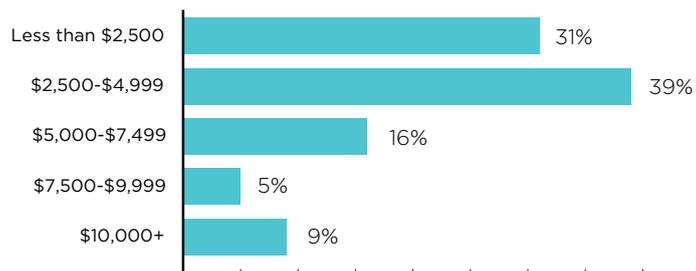


2012 Arrivals	2012 Spending
1.79 million	\$9.3 billion
+19% v 2011	+11% v 2011
Rank: 6	Rank: 5

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

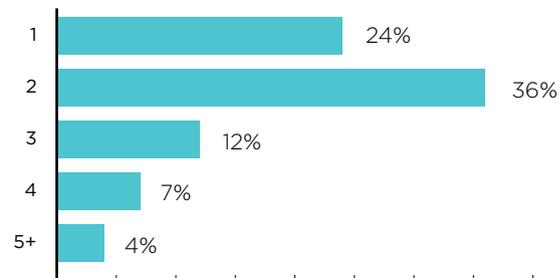
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,783.30	\$3,418.80



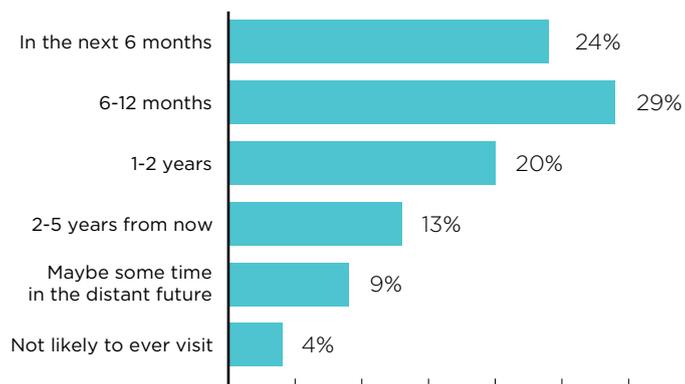
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



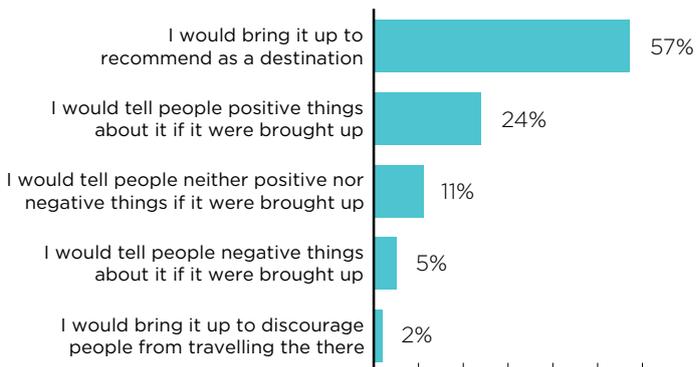
Question: How many people in your household will go on this trip? Please count yourself as 1.

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: Canada

Top 5 Motivations for Selecting Last International Destination

Motivation	% Selected
Beaches/seaside attractions	54%
Cultural Historical Attractions	50%
Local Lifestyle	44%
Dining/Gastronomy	38%
Shopping	31%

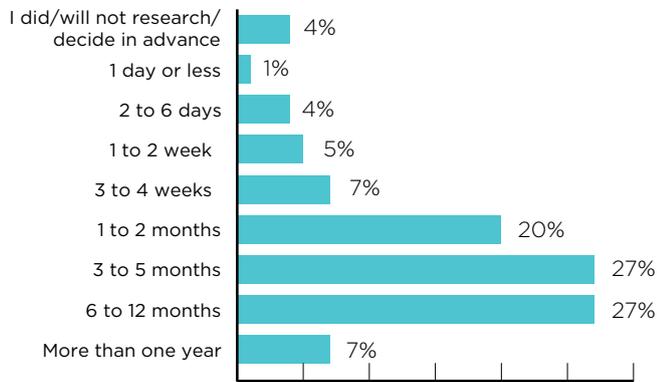
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	42%
Friendly	37%
Energetic	29%
Arrogant	29%
Trendy	28%

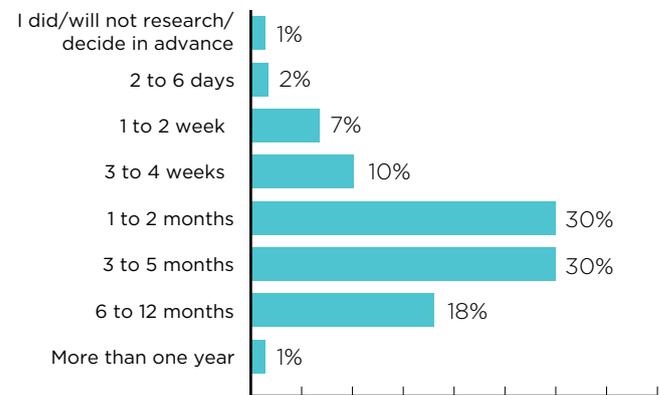
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next International Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last International Trip

Channels	% Selected
Websites via Computer or Laptop	71%
Personal Recommendations from Family and Friends	49%
Information in Printed Travel Guidebooks	36%
Personal advice from travel professionals/travel agents	34%
Printed publications, articles and brochures	30%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Canada would most like to visit



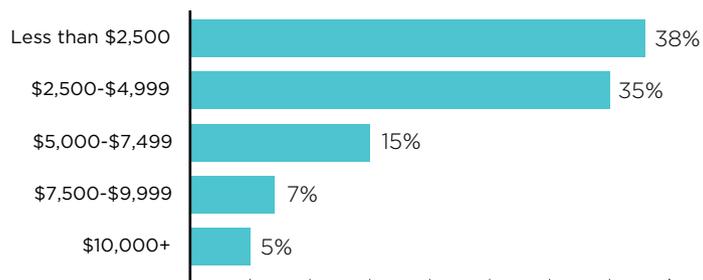
2012 Arrivals	2012 Spending
22.70 million	\$25.5 billion
+6% v 2011	+6% v 2011
Rank: 1	Rank: 1

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

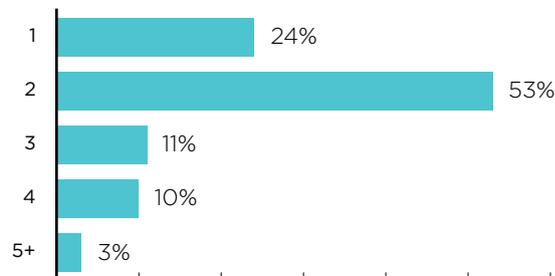
Expected Household Travel Spend for Next International Trip

Mean	Median
\$4,031.04	\$3,332.00



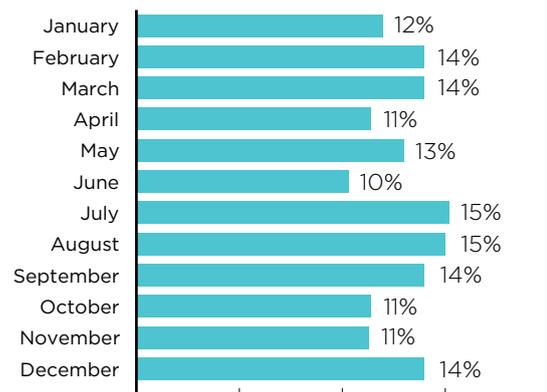
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next International Trip



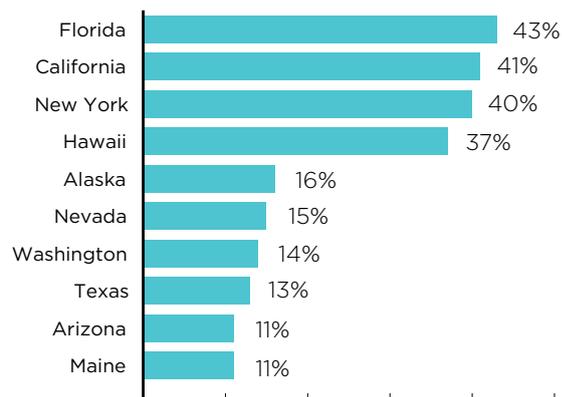
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



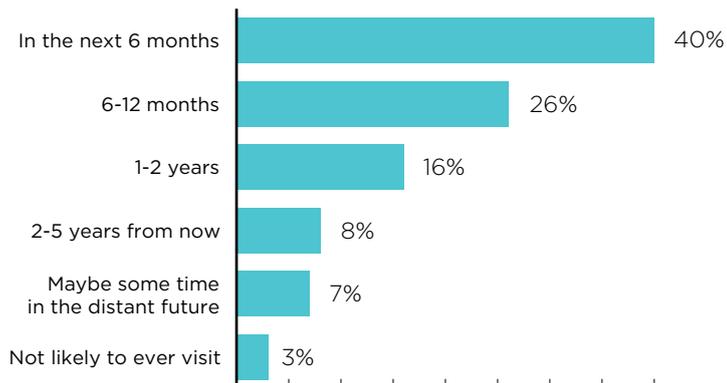
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



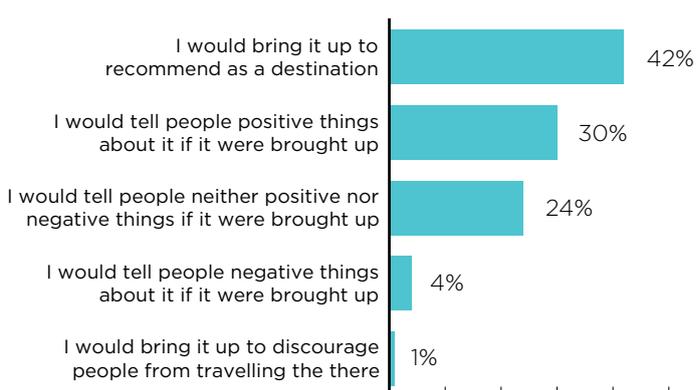
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: China

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Ecotourism and nature	70%
Cultural Historical Attractions	62%
Beaches/seaside attractions	60%
Urban attractions (Nightlife, City tours)	59%
Dining/Gastronomy	55%

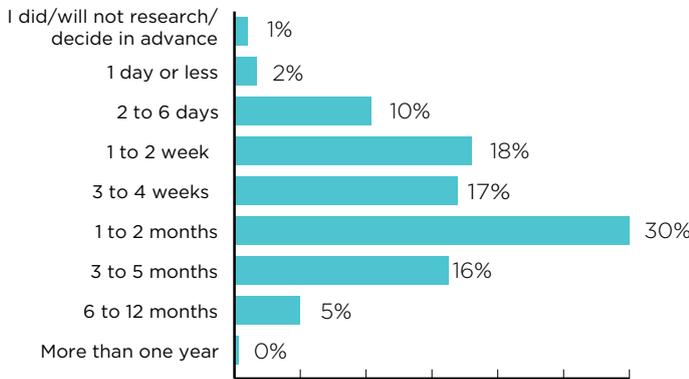
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	52%
Energetic	49%
Open-minded	49%
Creative	43%
Trendy	35%

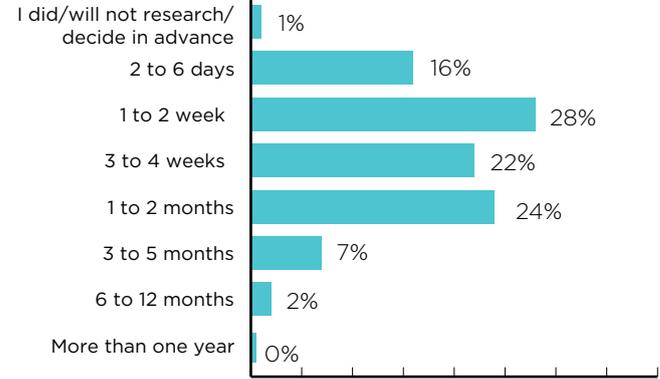
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	66%
Personal Recommendations from Family and Friends	53%
Websites or applications via tablet	42%
Personal advice from travel professionals/travel agents	43%
Websites or applications via mobile phone	34%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from China would most like to visit



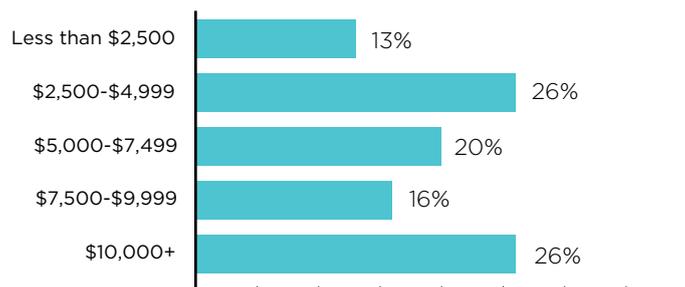
2012 Arrivals	2012 Spending
1.47 million	\$8.8 billion
+35% v 2011	+14% v 2011
Rank: 7	Rank: 6

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

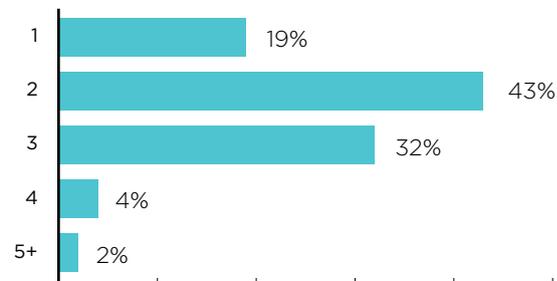
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$7,797.77	\$6,536.00



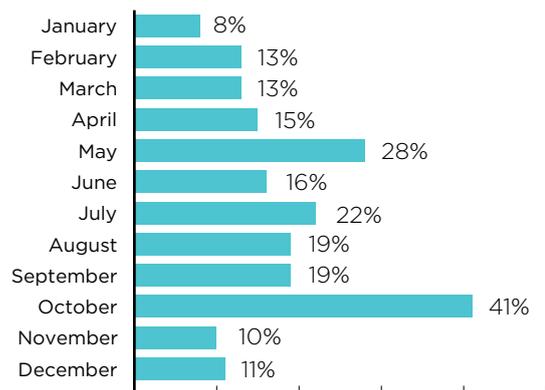
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



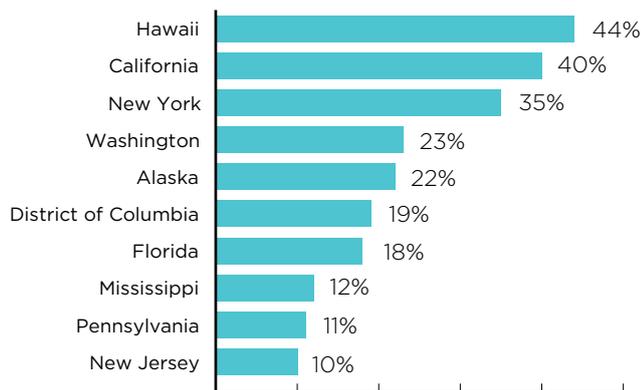
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



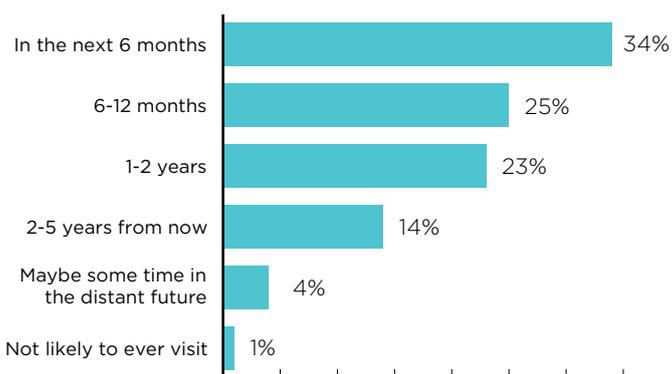
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



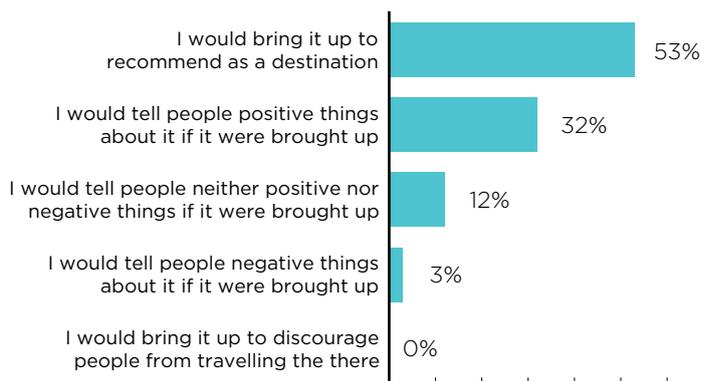
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: France

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Local Lifestyle	65%
Cultural Historical Attractions	58%
Beaches/seaside attractions	39%
Ecotourism and nature	39%
Dining/Gastronomy	36%

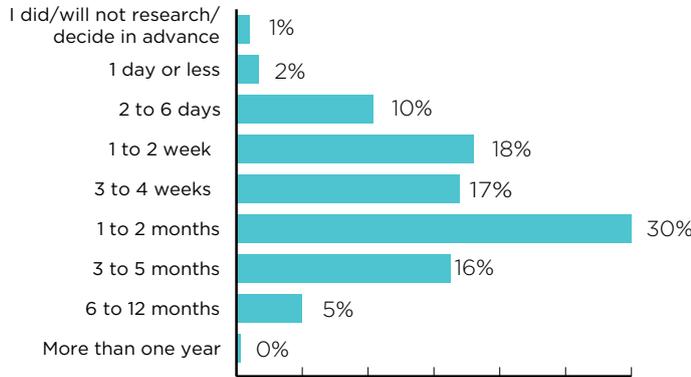
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	49%
Adventurous	34%
Trendy	29%
Forward-thinking	28%
Open-minded	28%

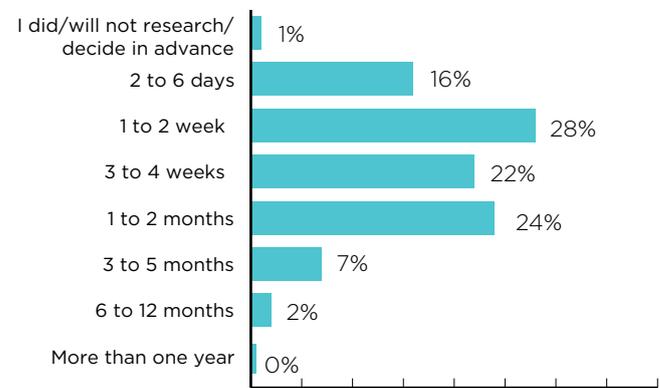
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last International Trip

Channels	% Selected
Websites via Computer or Laptop	64%
Personal Recommendations from Family and Friends	41%
Information in Printed Travel Guidebooks	33%
Personal advice from travel professionals/travel agents	25%
Websites or applications via mobile phone	23%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from France would most like to visit



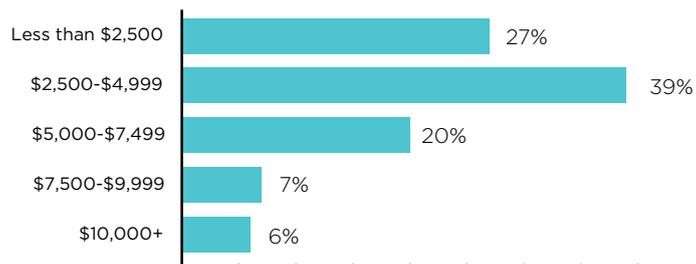
2012 Arrivals	2012 Spending
1.46 million	\$5.3 billion
-3% v 2011	+7% v 2011
Rank: 8	Rank: 9

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

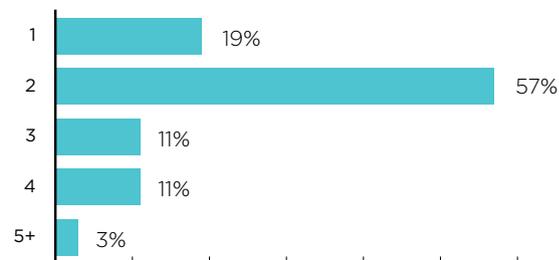
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,513.54	\$3,749.20



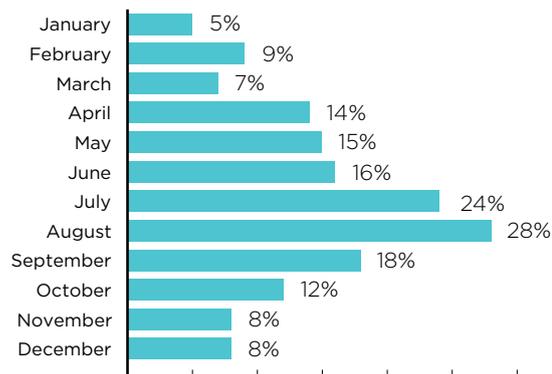
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



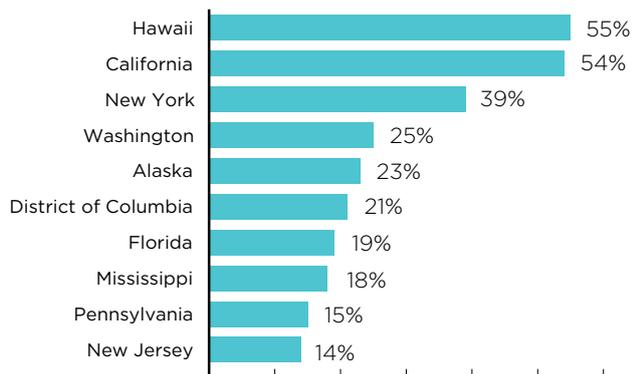
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



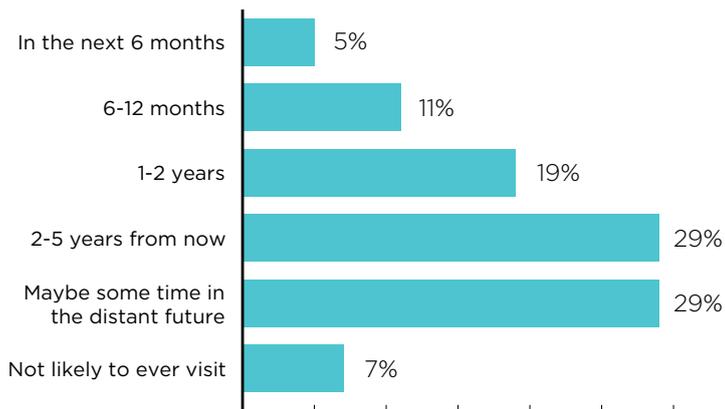
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



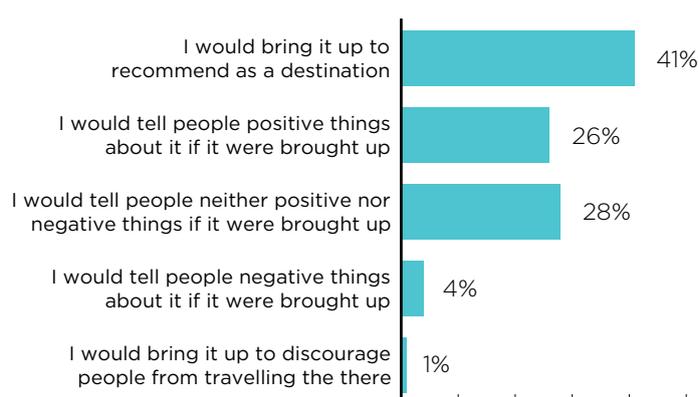
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: Germany

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	42%
Ecotourism and nature	38%
Urban attractions (nightlife, city tours)	36%
Shopping	33%
Local lifestyle	30%

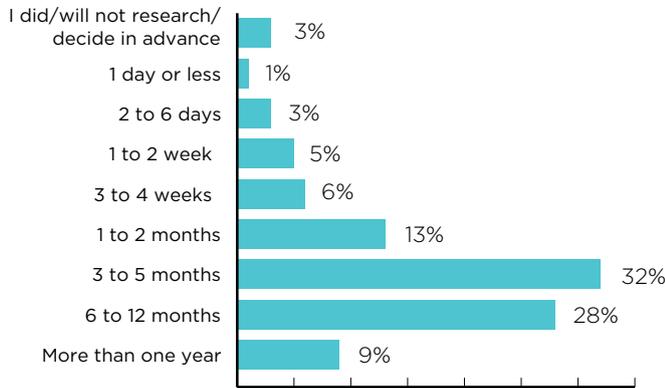
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	59%
Adventurous	49%
Forward-thinking	33%
Friendly	33%
Trendy	31%

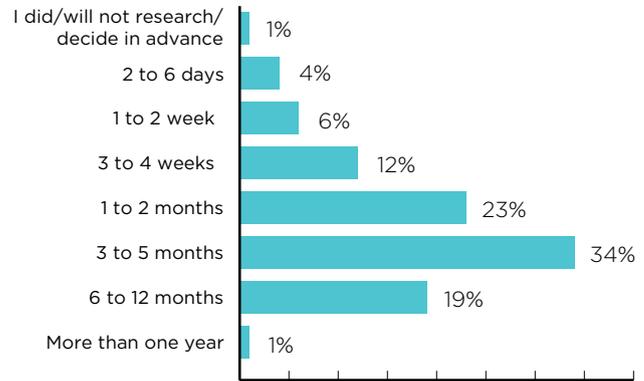
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	62%
Personal Recommendations from Family and Friends	42%
Information in Printed Travel Guidebooks	41%
Personal advice from travel professionals/travel agents	29%
Online Advertising/Email	14%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Germany would most like to visit



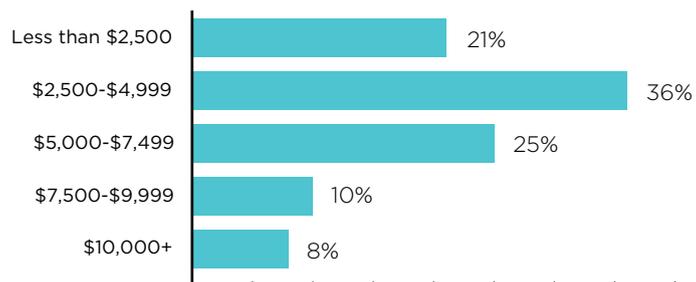
2012 Arrivals	2012 Spending
1.88 million	\$6.9 billion
+3% v 2011	+10% v 2011
Rank: 5	Rank: 7

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

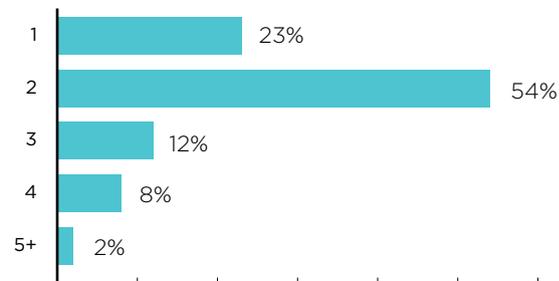
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$5,158.00	\$4,420.00



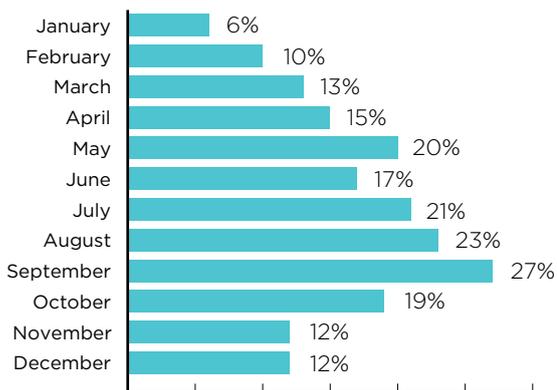
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



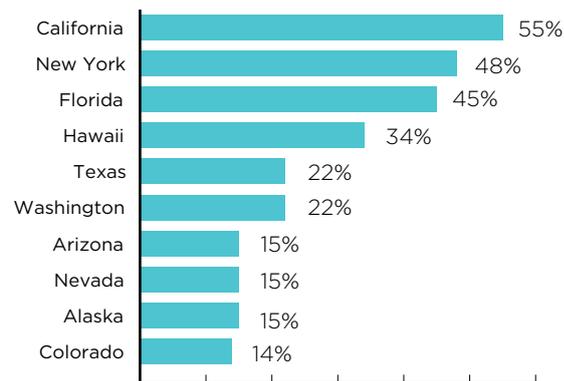
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



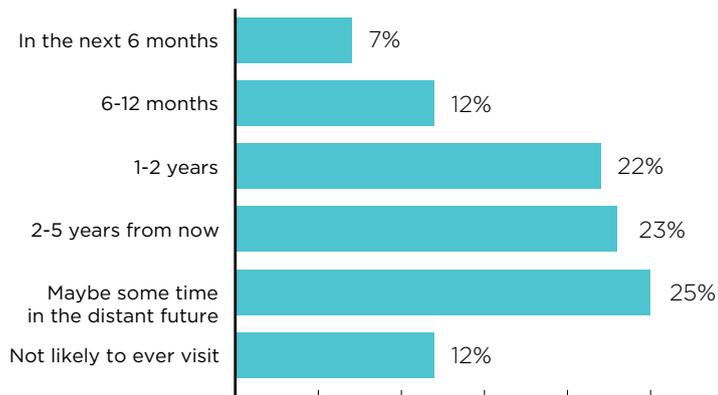
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



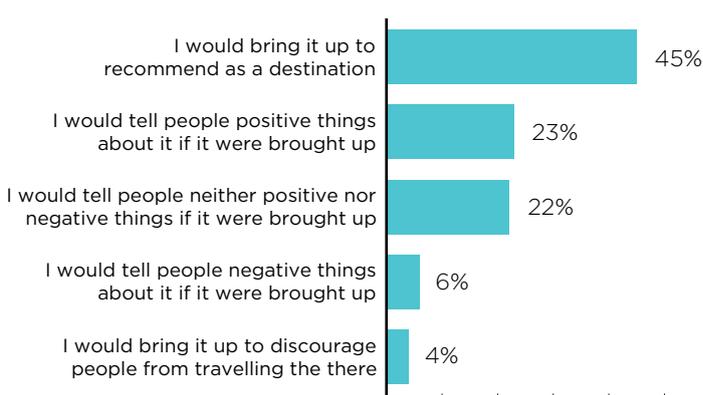
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: India

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Beaches/Seaside Attractions	65%
Shopping	61%
Local lifestyle	54%
Cultural Historical Attractions	53%
Theme parks	46%

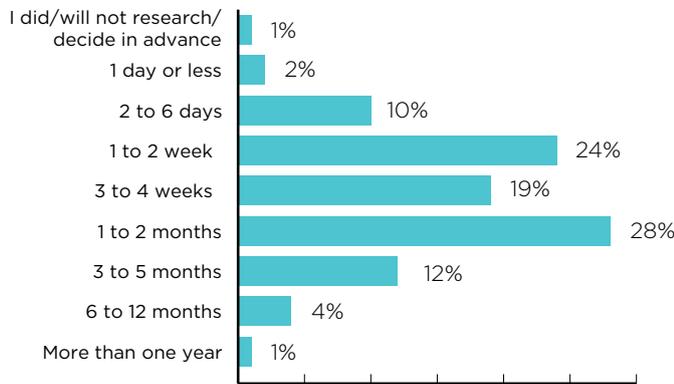
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Top 5 Strongest Impressions of the USA

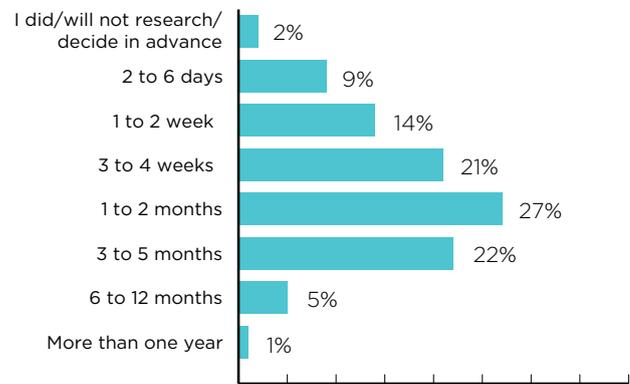
Impression	% Selected
Friendly	50%
Open-Minded	49%
Energetic	46%
Forward-thinking	43%
Trendy	37%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	65%
Personal Recommendations from Family and Friends	53%
Personal advice from travel professionals/travel agents	42%
Websites or applications via tablet	40%
Online Advertising/Email	40%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from India would most like to visit



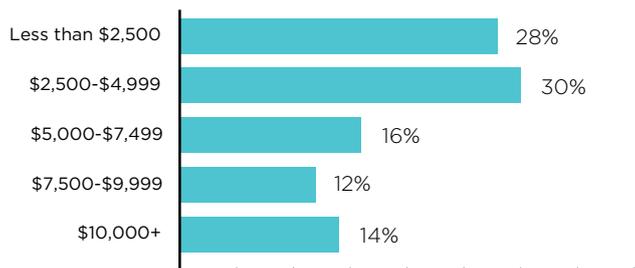
2012 Arrivals	2012 Spending
724,000	\$4.9 billion
+9% v 2011	+10% v 2011
Rank: 12	Rank: 10

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

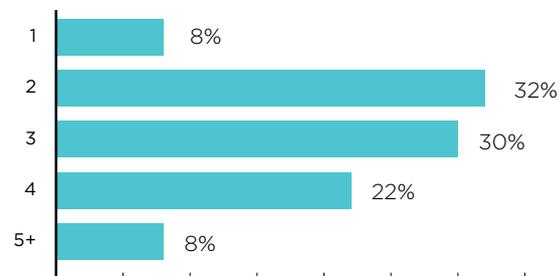
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$5,461.47	\$4,425.00



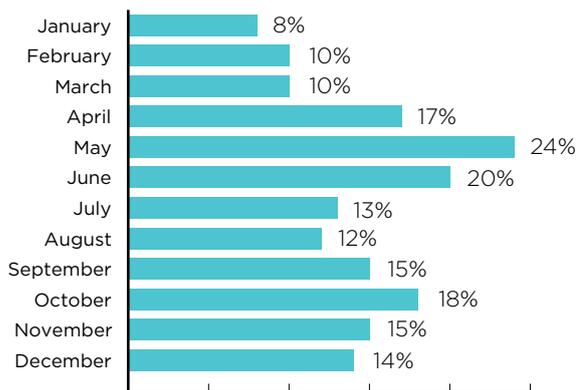
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



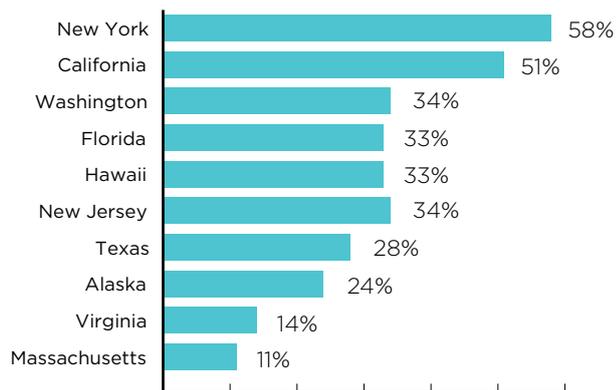
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



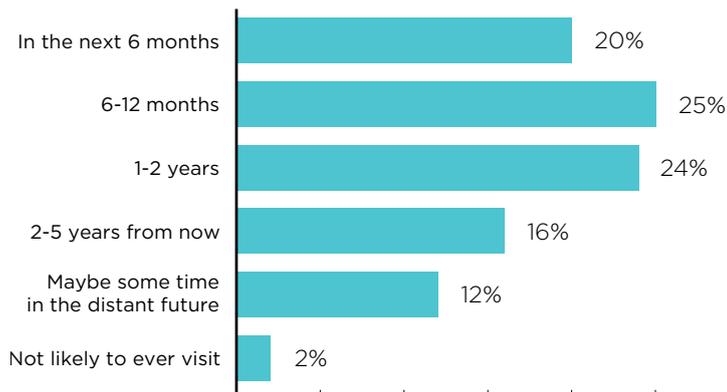
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



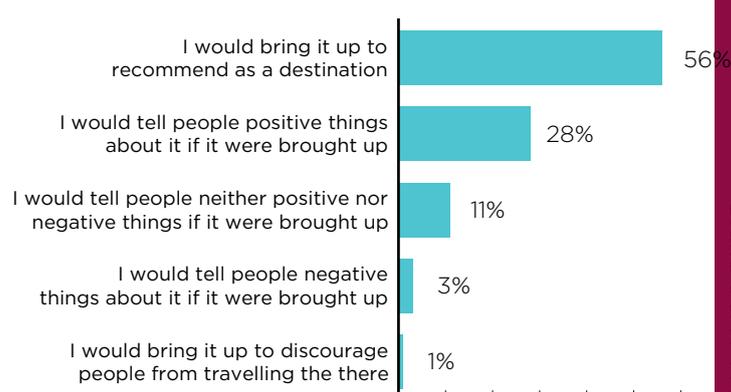
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: Japan

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	55%
Dining/Gastronomy	52%
Shopping	38%
Local lifestyle	29%
Beaches/Seaside Attractions	27%

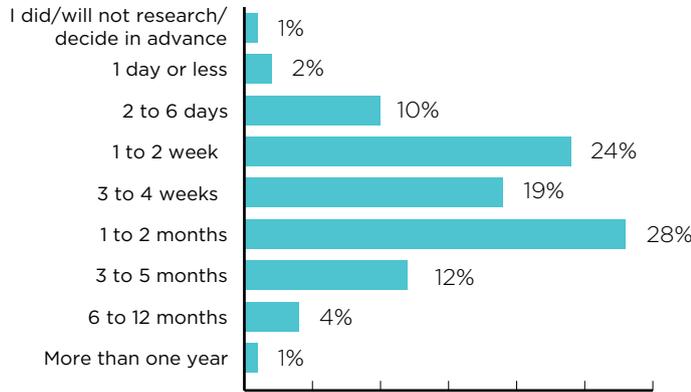
Top 5 Strongest Impressions of the USA

Impression	% Selected
Energetic	44%
Diverse	40%
Friendly	28%
Optimistic	22%
Open-Minded	20%

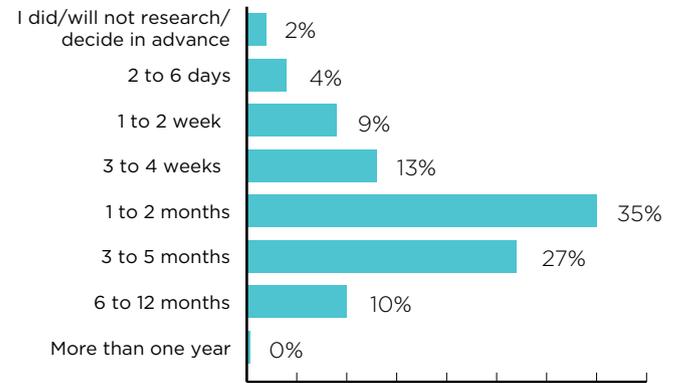
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	64%
Information in Printed Travel Guidebooks	39%
Print publications, articles and brochures	29%
Personal recommendations from friends/family	20%
Personal advice from travel professionals/travel agents	17%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Japan would most like to visit



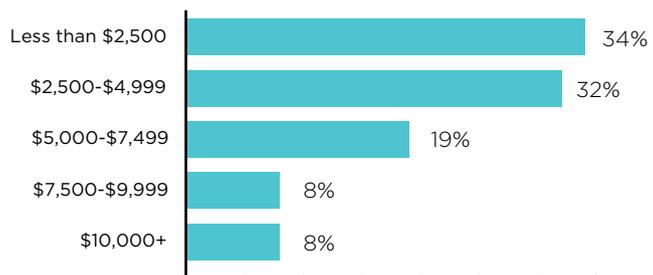
2012 Arrivals	2012 Spending
3.7 million	\$16.5 billion
+14% v 2011	+13% v 2011
Rank: 4	Rank: 2

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

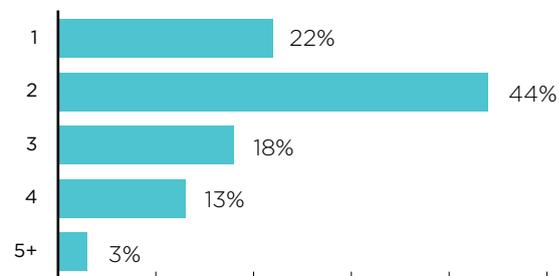
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,254.73	\$3,500.00



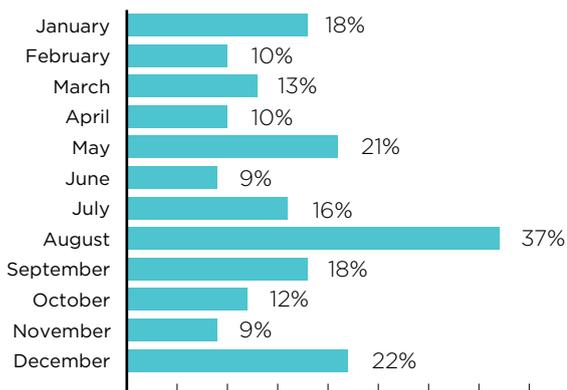
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



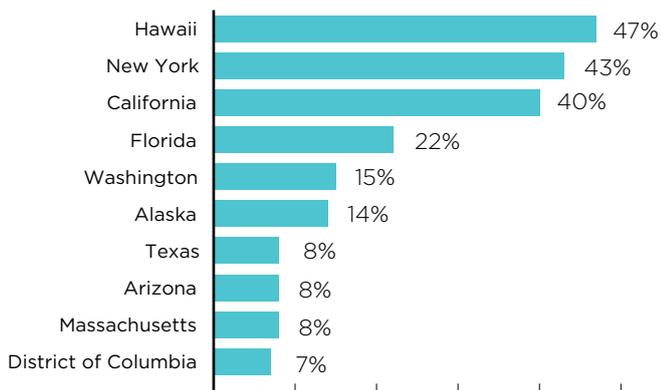
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



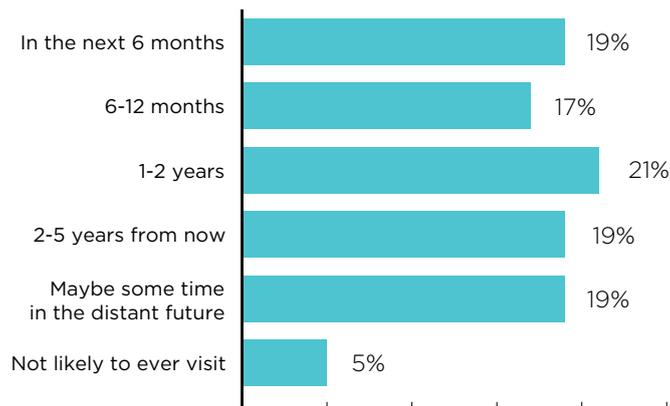
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



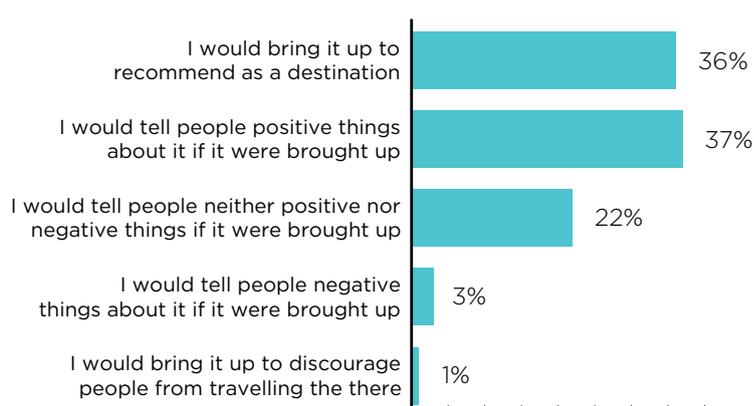
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: South Korea

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	59%
Beaches/Seaside Attractions	50%
Ecotourism/Nature	49%
Urban attractions/Nightlife	43%
Local lifestyle	37%

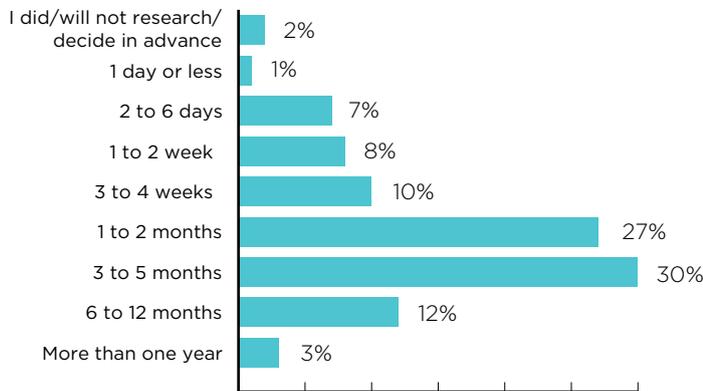
Top 5 Strongest Impressions of the USA

Impression	% Selected
Open-Minded	56%
Diverse	53%
Energetic	47%
Down-to-earth	34%
Sophisticated	28%

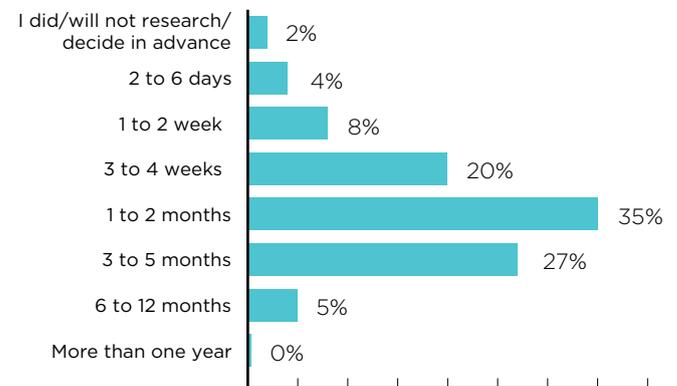
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



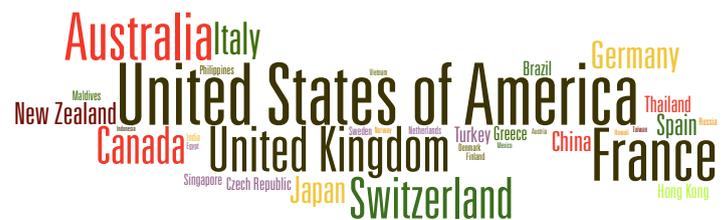
Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	66%
Personal recommendations from friends/family	46%
Personal advice from travel professionals/travel agents	38%
Information in printed travel guidebook	29%
Websites or applications via mobile phone	25%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from South Korea would most like to visit



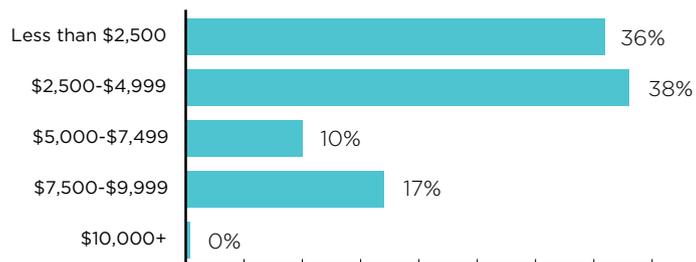
2012 Arrivals	2012 Spending
1.25 million	\$4.2 billion
+9% v 2011	+10% v 2011
Rank: 9	Rank: 11

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

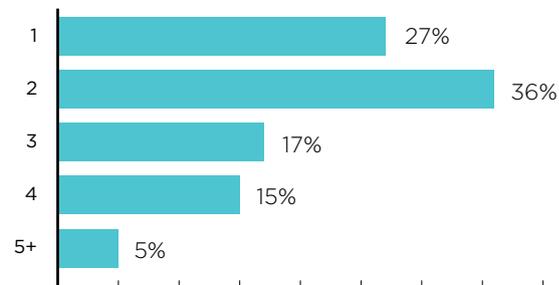
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$3,902.92	\$2,700.00



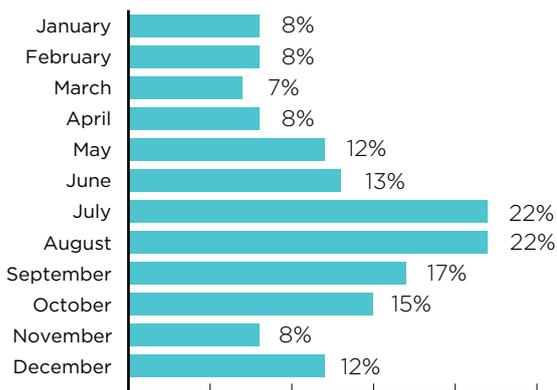
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



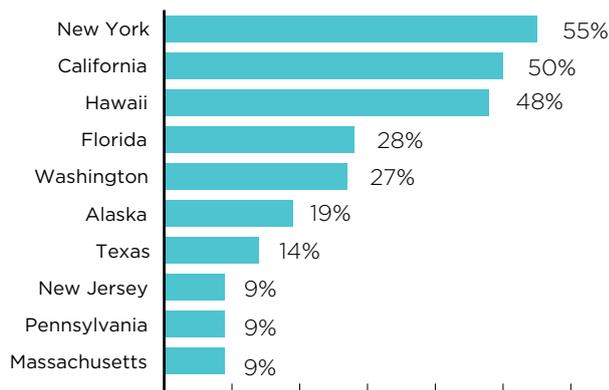
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



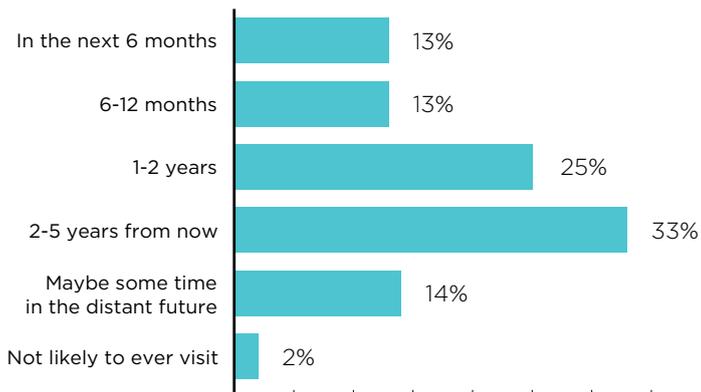
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



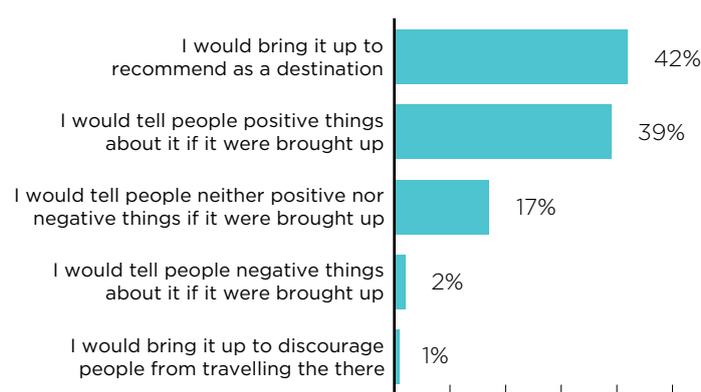
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: Mexico

Top 5 Motivations for Selecting Last International Destination

Motivation	% Selected
Shopping	46%
Visiting friends/relatives	44%
Urban attractions	44%
Dining/Gastronomy	42%
Historical/archaeological attractions	36%

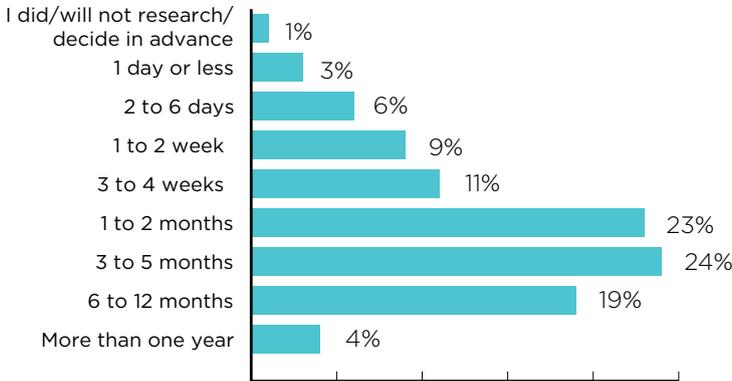
Top 5 Strongest Impressions of the USA

Impression	% Selected
Trendy	73%
Diverse	61%
Open-minded	52%
Forward thinking	50%
Adventurous	43%

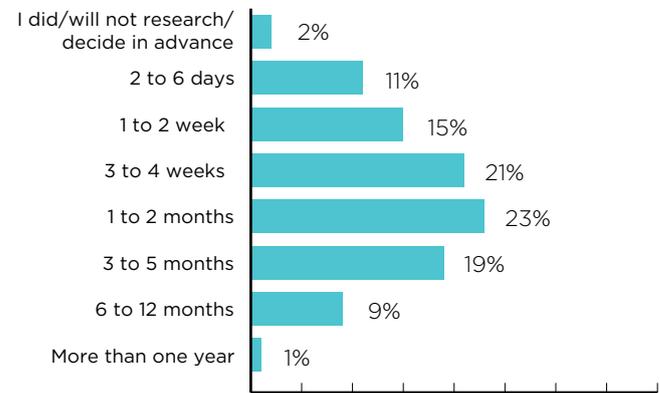
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next International Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last International Trip

Channels	% Selected
Personal recommendations from friends/family	54%
Websites via computer	54%
Websites or applications via tablet	24%
Online advertising/email	23%
Information in printed travel guidebooks	21%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Mexico would most like to visit



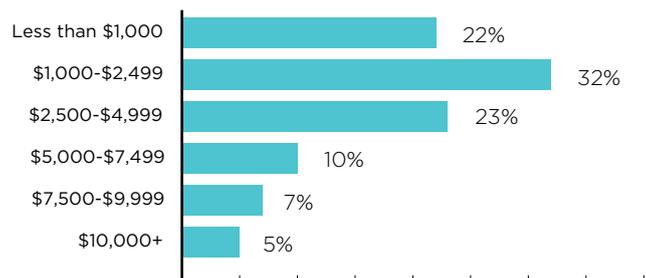
2012 Arrivals	2012 Spending
14.51 million	\$10 billion
+8% v 2011	+8% v 2011
Rank: 2	Rank: 4

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

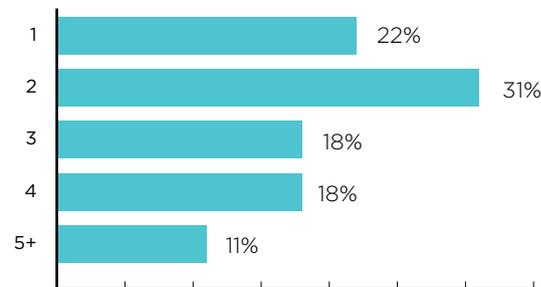
Top 5 Channels Used in Destination Selection for Last International Trip

Mean	Median
\$3,687.67	\$2,333.37



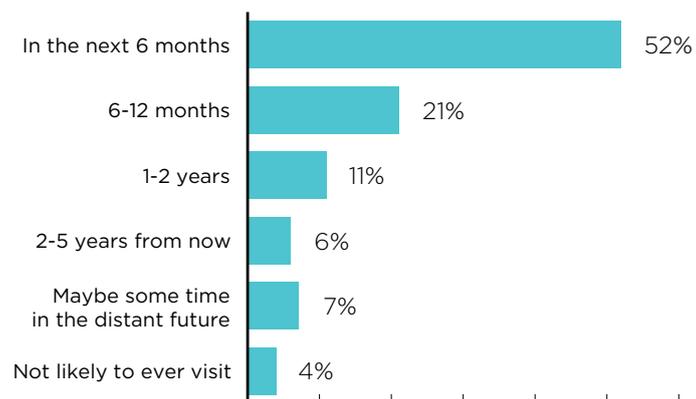
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next International Trip



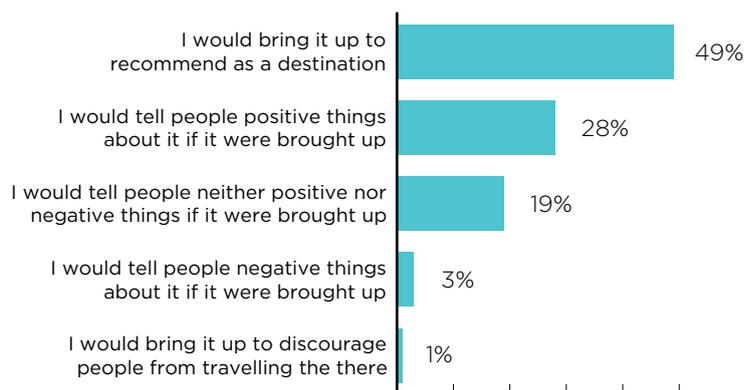
Question: How many people in your household will go on this trip? Please count yourself as 1.

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: Russia

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Beaches/Seaside Attractions	67%
Cultural/Historical Attractions	58%
Sport and adventure	48%
Local lifestyle	46%
Ecotourism and nature	44%

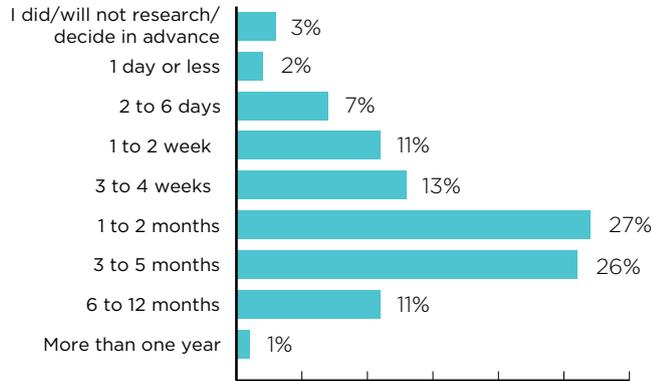
Top 5 Strongest Impressions of the USA

Impression	% Selected
Creative	45%
Boring	38%
Down-to-earth	37%
Diverse	27%
Forward thinking	20%

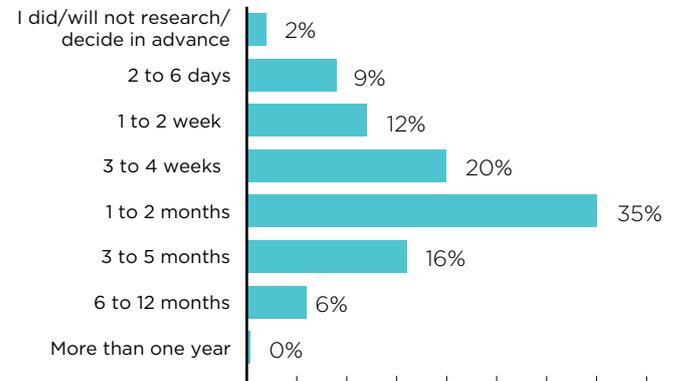
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	71%
Personal recommendations from friends/family	54%
Personal advice from travel professionals/travel agents	41%
Online advertising/Email	30%
Information in printed travel guidebooks	29%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from Russia would most like to visit



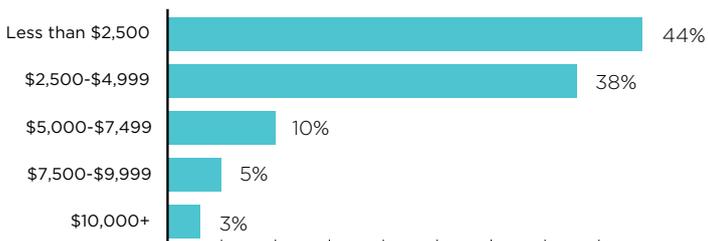
2012 Arrivals	2012 Spending
260,000	N/A
+17% v 2011	N/A
Rank: 26	N/A

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

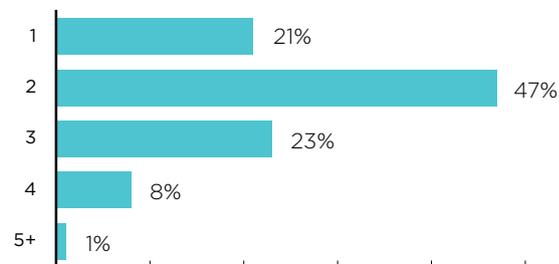
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$3,417.33	\$2,850.00



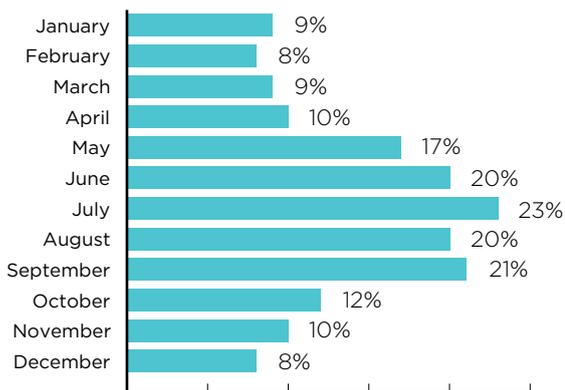
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



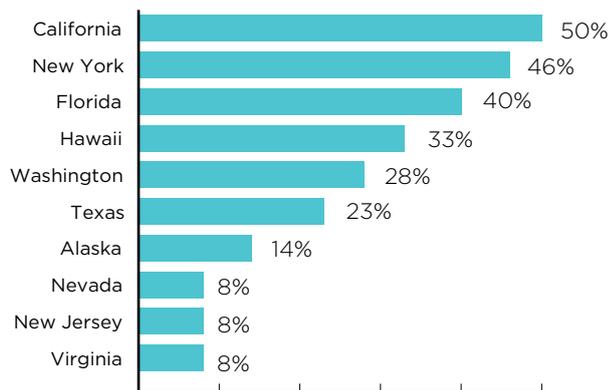
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



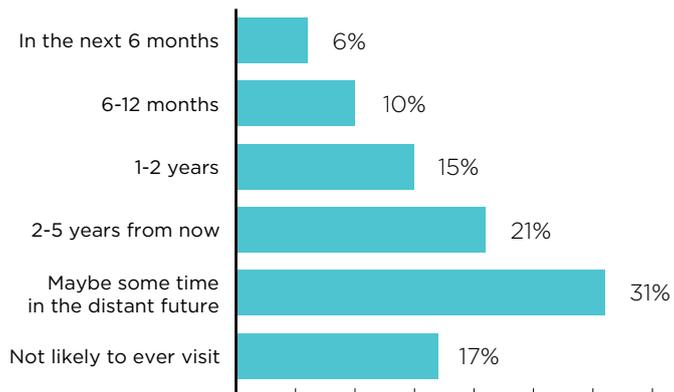
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



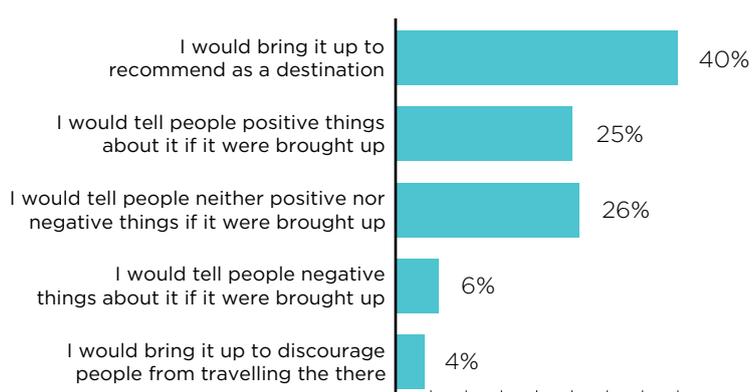
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Market Profile: United Kingdom

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural/Historical Attractions	50%
Local lifestyle	49%
Beaches/Seaside attractions	46%
Dining/Gastronomy	34%
Shopping	30%

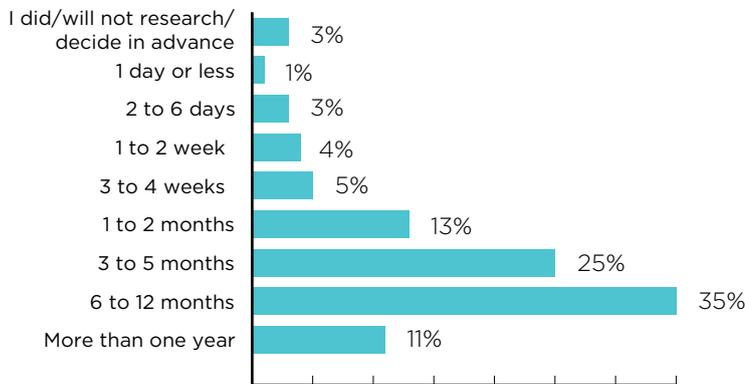
Top 5 Strongest Impressions of the USA

Impression	% Selected
Friendly	50%
Diverse	43%
Energetic	41%
Adventurous	41%
Open-minded	25%

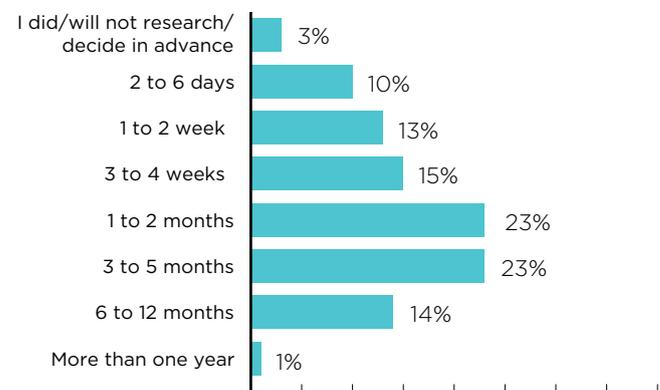
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	65%
Personal recommendations from friends/family	37%
Information in printed travel guidebooks	26%
Printed publications articles and brochures	21%
Websites of applications via Tablet	19%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Countries travelers from the United Kingdom would most like to visit



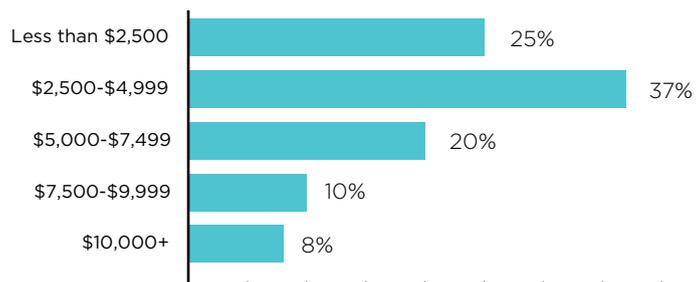
2012 Arrivals	2012 Spending
3.76 million	\$12.6 billion
-2% v 2011	+6% v 2011
Rank: 3*	Rank: 3*

U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI)

Source: Brand USA Proprietary Research unless otherwise noted.

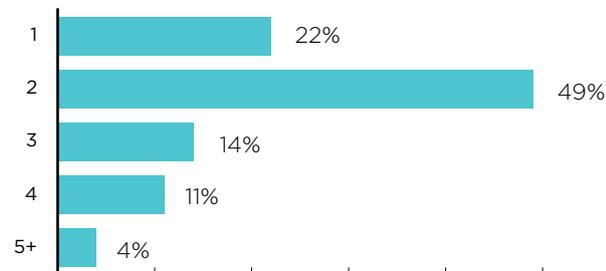
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,941.16	\$4,190.04



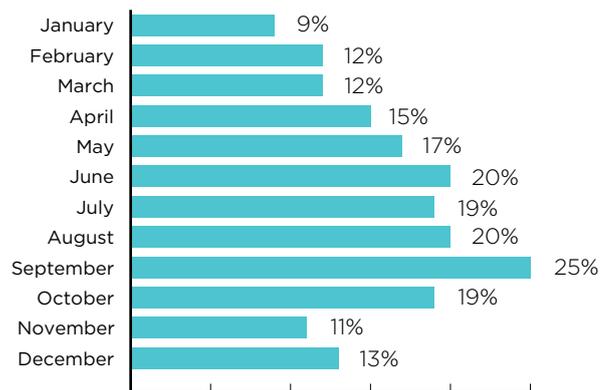
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours

Expected Travel Party Size of Next Intercontinental Trip



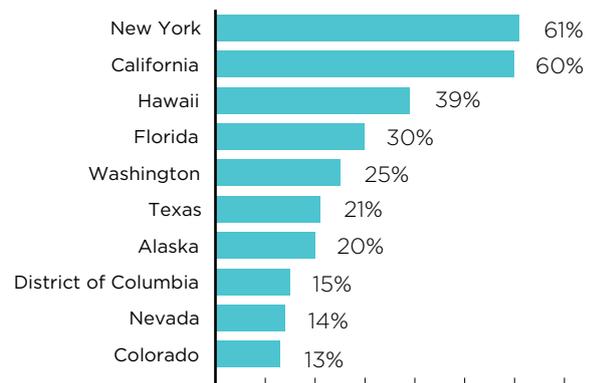
Question: How many people in your household will go on this trip? Please count yourself as 1.

Months Traveled 2011-2012



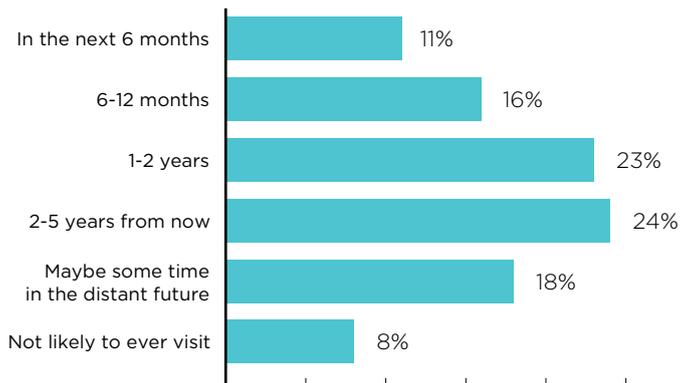
Question: During what month(s) did you take your N holiday(s)?

Destination Interest - Top 10 States



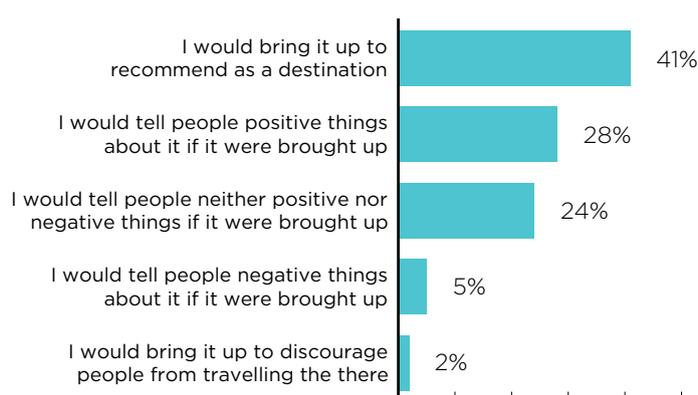
Question: Which destination(s) are you interested in visiting during your next holiday?

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?



Partnership Programs and Resources



Ways to Engage with Brand USA

Brand USA offers a variety of marketing-driven programs to amplify your reach internationally, inspire visitors to travel to the United States and drive tourism dollars to your organization, city or state.

Discover America Global Inspiration Guide

These language-specific guides are designed to inspire travel by displaying the richness and variety of American experiences through stunning photography and compelling copy. You can sponsor content that encourages readers to connect with additional online, mobile, email and social assets. In FY14, more than 550,000 print copies will be produced, creating impressions in 16 international markets.

DiscoverAmerica.com

Brand USA's global website is becoming an essential resource for potential and future visitors to the USA to explore destinations and experiences, natural wonders and find valuable travel information. Choose from a variety of programs designed to drive traffic and referrals, including:

- Experience, regional, state and city enhanced pages featuring destination content, photos, videos, links and more
- 2-minute in-language content video journals
- TripTuner® – An interactive online tool for exploring destinations based on experiences and interests
- Digital marketing initiatives, including search engine marketing campaigns, will extend your current search budget and drive traffic to DiscoverAmerica.com
- Social media stories and promotions customized for each country, led by an in-country editor
- Country specific digital programs created in language and following in-market online behaviors

Media Planning & Buying

Brand USA works with each partner on an individual basis to determine which programs can be maximized to extend your reach and drive international visitors to you.

Brand USA In-Country Multi-Channel Programs

These market-driven multi-channel programs are created individually for each country and coincide with Brand USA consumer marketing campaigns. They are customized based on the channels that are most effective in each country and include print, digital, email, radio and television. Packaged affordably, they feature calls to action that drive travelers directly to your organization.

Customized In-Country Marketing Initiatives

Brand USA international representative offices can develop customized programs for your destination or organization. During a Brand USA-funded ideation session, we work with you to identify goals, objectives and budgets. Then our experienced in-country representatives put together an effective plan based on your needs. Many programs qualify for additional Brand USA support, further extending the reach of your marketing efforts.

Media and Travel Trade Outreach

Brand USA will help you directly target and connect with international travel media, generating media coverage for your destination or organization and helping you expand your network and connections with international travel trade representatives. Through the Brand USA Media Network powered by TravMedia and the Brand USA Travel Trade Network powered by TravTrade, we help you increase your profile with international journalists and influential members of the travel community.

USA Discovery Program

Launched in June in the United Kingdom and Ireland, this online training tool inspires the travel industry to sell the diverse destinations and experiences available in the USA like never before. Destinations that have already invested in a training program for agents and tour operators will have the opportunity to link into the Brand USA Discovery Program.

Influential international travel industry experts are incentivized to learn more about U.S. destinations, experiences and organizations by earning badges and accreditations as they progress through the program.

International Tradeshows and Missions

Brand USA creates a strong United States presence at key travel trade shows throughout the world. Through highly branded USA Pavilions that are vibrant, open and welcoming, we are able to provide a higher profile for the United States and participating partners. Additional Brand USA organized events will take place before, during and after shows, based on the market and the needs of the partners.

Your destination or organization will retain its own identity but be part of a collaborative United States effort. Partner with us and receive opportunities and a variety of benefits, including:

- Increased exposure through Brand USA events at the tradeshow
- Marketing, advertising and public relations activities pre and post event
- Participation in customer engagement and entertainment opportunities
- Unified United States branding elements

Sales missions are planned in many countries where Brand USA has international representation and are currently scheduled for Australia, Brazil, Hong Kong, and India during FY14.

In-Kind Support: Promotion and Contributions

- Promoting the United States in your marketing initiatives is a key way to support Brand USA. Through simple activities, your cash and in-kind support powers the United States international marketing campaign with matching federal funds:
- Include the Brand USA logo in advertising
- Provide ad space to Brand USA
- Add the Brand USA logo to your internationally focused websites, emails, Facebook pages, etc.
- Donate photos, videos and international research to Brand USA
- Contribute airfare, accommodations, food & beverage or other services to support Brand USA events, familiarization trips, travel missions, and trade show.

Brand USA Authorized Co-Op Marketing Programs - Extending Your Reach

By participating in these customizable programs with independent publishers and online travel agencies (OTAs) you enhance your budget because Brand USA matches your investment. Print publications, digital media and publishers, broadcast media, tour operators, OTAs and multi-platform media outlets are participating in the following countries, with additional media platforms added regularly:

- Australia
- Canada
- China
- Germany
- India
- Japan
- South Korea
- Mexico
- New Zealand
- Scotland
- Taiwan
- United Kingdom

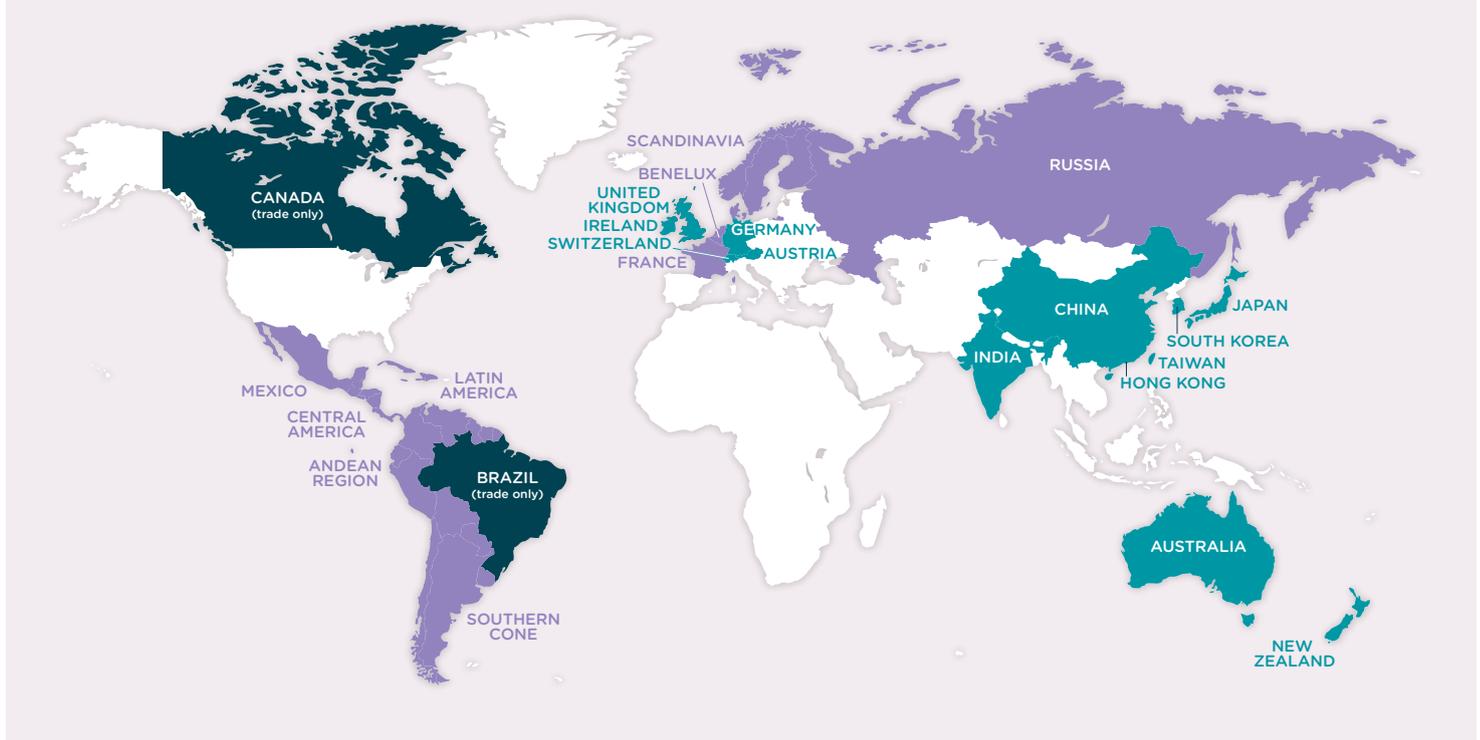
Authorized Brand USA Co-op Marketing Partners

ONLINE TRAVEL AGENCIES		
NAME	MARKETS	CONTACT
Best Day Travel	Mexico, Argentina, Brazil, Colombia	Hector Arroyave Harroyave@bestday.com
Expedia & ELong	United Kingdom, Canada, Japan, Mexico, Brazil, Australia, India, Germany, South Korea, China	Krista Bentley Mesolead@expedia.com
Hana Tour	South Korea	Young-moon Lee Ymlee@hanatour.com
Interpark Tour	South Korea	Sho-yeoum Yang Jsy@interpark.com
Odigeo	United Kingdom, France, Germany, Spain, Italy, Nordic (Sweden, Denmark, Norway, Finland), Australia, Brazil, Mexico, Argentina	James O'Leary James.oleary@odigeo.com
Orbitz Worldwide (Orbitz/Ebookers/Hotel Club/Cheaptickets)	Japan, Canada, Korea, Brazil, Australia, China, Mexico, Germany, France, India	Jennifer Andre Jennifer.andre@orbitz.com
Rakuten Travel (Orbitz/Ebookers/Hotel Club/Cheaptickets)	Japan	New York: Ralph Mauriello ralph.mauriello@mail.rakuten.com San Francisco: Miwo Yamada toshinobu.matsumoto@mail.rakuten.com Tokyo: Vincent Andretta vincent.andretta@mail.rakuten.com
TripAdvisor & Dao Dao	Spain, Italy, France, Germany, United Kingdom, Ireland, India, Japan, China, Brazil, Netherlands, Sweden Canada, Denmark, Mexico, Turkey, Norway, Poland, Australia, Thailand, Singapore, South Korea, Russia, Greece, Indonesia, Argentina, Taiwan, Malaysia, Egypt	Melissa Surane msurane@tripadvisor.com
MULTI-MEDIA		
Mountain News Corporation (Skiinfo / OnTheSnow)	Australia, Austria, Belgium, Brazil, Canada, Czech Republic, Denmark, Germany, Spain, France, Italy, Mexico, Netherlands, New Zealand, Norway, Poland, Russia, Switzerland, Slovakia, Sweden, United Kingdom	Chad Dyer dyer@mountainnews.com
WAYN	Australia, Brazil, Canada, China, France, Germany, India, Japan, Mexico, South Korea, United Kingdom	Nathan Easom nathan.easom@wayn.com
PRINT		
Essentially America	United Kingdom, Germany, China, Latin America (Mexico & Brazil), Canada, Australia / New Zealand, Japan, Korea	Larry Cohen larry.cohen@northeast-media.com

Brand USA International Representation Firms And Trade Outreach

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

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



CURRENT INTERNATIONAL AND TRADE REPRESENTATION

Australia
Austria
Brazil (trade only)
Canada (trade only)
China
Germany

Hong Kong
India
Ireland
Japan
New Zealand

South Korea
Switzerland
Taiwan
United Kingdom

COMING SOON

Canada (Nov. 2013)
Latin America (Nov. 2013)
Mexico
Brazil
Andean Region
Southern Cone
France (March 2014)
Benelux (March 2014)
Scandinavia (March 2014)
Russia (June 2014)

International representatives are extensions of the Brand USA team in-market and fulfill a variety of functions ranging from traditional trade activities like trade shows and PR communications to brokering in-kind contributions to collaborating with U.S. embassies and consulates on projects of mutual interest. In addition, Brand USA

engages in ongoing trade and consumer outreach through marketing, advertising, familiarization trips, sales missions, and training. Other outreach includes working with the Visit USA committees worldwide to ensure the USA remains top of mind as a travel destination.

Brand USA International Representation Firms

AUSTRALIA & NEW ZEALAND

Gate 7

Founded in 1998, Gate 7 was inspired in equal part by passion for the travel experience, the discipline of marketing, and the challenge of creating something from scratch. For more than 15 years, it has built a reputation as a strong, reliable and vibrant partner in destination marketing and representation in the Australian and New Zealand markets, winning multiple travel industry awards.

As outbound travel from Down Under has strengthened and boomed over recent years, Gate 7's capabilities have continued to evolve beyond the key competencies of travel trade and public relations, with experience working on large scale, consumer facing programs and complex integrated marketing campaigns. On June 1, 2013, Gate 7 launched its second office in Auckland, New Zealand.

Contact: Jo Palmer
jo@gate7.com.au

CHINA

AVIAREPS Marketing Garden Ltd

Formed in 1999, Tokyo-based AVIAREPS is a destination marketing company specializing in outbound travel. The largest company of its kind in Asia-Pacific, it has 11 offices.

AVIAREPS is known for its expertise in inbound mission organization, embassy and government relations, traded educational seminars, travel trade cooperative programs, trade shows, media relations and website development.

Contact: Mavis Zheng
mzheng@aviareps.com

GERMANY, AUSTRIA, & SWITZERLAND

Brandmasters America

Four leading agencies in Germany, Austria and Switzerland joined together to provide Brand USA with the best international team for the region. Together, the following organizations work under the Brandmasters umbrella to leverage their individual and collective talents to oversee and execute high-impact campaigns.

Get it Across Marketing & PR is a full-service tourism marketing and public relations company based in Cologne. Opened in 1999, it's recognized for strong industry and press contacts.

Launched in 1990, MSi - Marketing Services International is a leading tourism representation company in German-speaking markets. Based in Frankfurt, Germany, MSi specializes in travel trade marketing and representation services, publicity and sales promotions, company analysis and management consultancy, and event planning.

Travel Marketing Romberg (TMR) was founded in 1992. Located near Dusseldorf, Germany, it's well known as an efficient agency covering destination marketing, public relations, destination education, social media and multimedia services.

Frankfurt-based Weichmann Tourism Service GmbH was established in 1981 and is a full-service travel/tourism sales, marketing and public relations company.

Contact: Christian Zerbian
christian.zerbian@thebrandusa.de

HONG KONG & TAIWAN

BrandStory Inc. & Connectworldwide

Established in 2002 and headquartered in the U.S., Connectworldwide provides outsourced global travel representation in the areas of sales and marketing for the travel industry. Connectworldwide's global network now extends to 40 markets with 36 agencies around the world.

Contact: Reene Ho-Phang
reene@brandstory.asia

INDIA

Sartha Marketing

Sartha Marketing is an industry leader that offers integrated sales and marketing consultancy and solutions to companies, tourism products, and destinations seeking to set up operations and do business in India. Sartha focuses on tourism, hospitality, aviation, and trade/economic boards. Headquartered in New Delhi, the company also operates branch offices in Mumbai and Chennai.

Contact: Sheema Vohra
sheema.vohra@sarthaindia.com

JAPAN

AVIAREPS Marketing Garden Ltd

Formed in 1999, Tokyo-based AVIAREPS is a destination marketing company specializing in outbound travel. The largest company of its kind in Asia-Pacific, it has 11 offices.

AVIAREPS is known for its expertise in inbound mission organization, embassy and government relations, traded educational seminars, travel trade cooperative programs, trade shows, media relations and website development.

Contact: Yoichi Hayase
yhayase@aviareps.com

SOUTH KOREA

AVIAREPS Marketing Garden Ltd

Formed in 1999, Tokyo-based AVIAREPS is a destination marketing company specializing in outbound travel. The largest company of its kind in Asia-Pacific, it has 11 offices.

AVIAREPS is known for its expertise in inbound mission organization, embassy and government relations, traded educational seminars, travel trade cooperative programs, trade shows, media relations and website development.

Contact: Gina Choi
gchoi@aviareps.com

THE UNITED KINGDOM & IRELAND

Black Diamond

Founded in 1991, Black Diamond is an experienced marketing organization that has represented 25 United States destinations. It's made up of numerous divisions, including travel, television and research. The London-based company provides trade, marketing, communications, technology, creative, media planning and brand strategy services.

Award-winning Black Diamond brings a fresh and effective perspective, using a rigorous and analytical approach that employs planners and digital strategists alongside staff and consultants with decades of United Kingdom travel trade representation and public relations experience.

Contact: Sarah Barnett
sbarnett@thebrandusa.co.uk

Tradeshows and Events

Brand USA At International Trade Shows

Brand USA will create a strong United States presence at more than 26 key travel trade shows throughout the world in FY2014. Brand USA organized events will take place before, during and after shows, based on the market and the needs of the partners. In addition, at many of these shows, a highly branded USA Pavilion that is vibrant, open and welcoming will showcase the United States and participating partners.



The number of USA exhibitors has increased significantly since Brand USA began hosting USA Pavilions at key shows.

Brand USA Trade Show Schedule

Brand USA will also increase its presence at influential international travel shows and hold a number of sales missions, workshops and seminars that provide partners and the USA increased visibility and effectiveness in its travel trade outreach and consumer marketing efforts.

EVENT	CITY/COUNTRY	DATES	CONSUMER (C)/ TRADE (T) TARGET	NUMBER OF VISITORS
TTG Incontri	Rimini, Italy	October 17-19, 2013	T	T: 50,685
Taipei ITF	Taipei, Taiwan	October 18-19, 2013	T&C	T: 18,581 + C: 232,650 = 251, 231
ITB Asia	Singapore	October 23-25, 2013	T	T: 8,500
WTM	London, United Kingdom	November 4-7, 2013	T	T: 47,776
EIBTM	Barcelona, Spain	November 19-21, 2013	T	T: 9,330
Vakantiebeurs	Utrecht, The Netherlands	January 15-19, 2014	C	C: 103,856 (2013)
SATTE	New Delhi, India	January 29-31, 2014	T	T: 7,419 (2013)
FITUR	Madrid, Spain	January 22-26, 2014	T&C	T: 64,473 + C: 91,082 = 155,555 (2013)
BIT	Milan, Italy	February 13-16, 2014	T&C	T: 60,000 + C: 30,000 = 90,000 (2013)
ITB Berlin	Berlin, Germany	March 5-9, 2014	T&C	T: 110,000 + C: 60,000 = 170,000 (2013 prel.)
MITT	Moscow, Russia	March 19-22, 2014	T&C	T: 54,586 + C: 19,179 = 73,765 (2013)
TUR	Gothenburg, Sweden	March 20-23, 2014	T&C	T: 11,700 + C: 21,000 = 32,700 (2013)
WTM Latin America	São Paulo, Brazil	April 23-25, 2014	T	T: 8,000+ (2013)
ATM	Dubai, United Arab Emirates	May 5-8, 2014	T	T: 17,575 (2012)
IMEX	Frankfurt, Germany	May 20-22, 2014	T	T: 8,782 (2012)
HITS	Seoul, South Korea	TBA, May-June 2014	T&C	T+C: 71,000 (2012)
ABAV	São Paulo, Brazil	TBA, September 2014	T&C	T: 28,000 (2012)
FITA	Mexico City, Mexico	September 25-28, 2014	T&C	T+C: 60,000 (2012)
JATA	Tokyo, Japan	TBA September 2014	T&C	T: 49,485 + C: 76,504 = 125,989 (2012)
IFTM Top Resa	Paris, France	September 23-26, 2014	T	T: 28,788 (2012)
TTG Incontri	Rimini, Italy	October 9-11, 2014	T	T: 50,685 (2012)
Taipei ITF	Taipei, Taiwan	November 7-10, 2014	T&C	T+C: 262,590 (2012)
ITB Asia	Singapore	October 29-31, 2014	T	T: 8,500 (2012)
FIT	Buenos Aires, Argentina	TBA	T&C	T+C: 92,233 (2012)
International Golf Travel Market	Italy	TBA, October 2014	T	T: 1,300 (2012)
WTM	London, England	November 3-6, 2014	T	T: 47,425 (2012)
CITM	Shanghai, China	TBA	T&C	T+C: 100,000+ (2012)
EIBTM	Barcelona, Spain	November 18-20, 2014	T	T: 15,200 (2012)
AIME	Melbourne, Australia	February 18-19, 2014	T	
BITE	Beijing, China	June 27-29, 2014	T&C	
Tianguis Turístico	Quintana Roo, Mexico	TBD	T	
Expoviajes CA	San Jose, Costa Rica	March 7-9	T&C	

NOTE: Schedule also posted on www.TheBrandUSA.com/industry-partners/events

Tradeshow Descriptions

TTG Incontri

Location: Rimini, Italy

Date: October 17-19, 2013

Type of Show: Business-to-Business

Background: TTG Incontri is the main international B2B exhibition on tourism in Italy. It is a marketplace for negotiations, networking and business between Italian and international companies and the intermediaries for tourist products.

Taipei ITF

Date: October 18-21, 2013

Location: Taipei, Taiwan

Type of Show: Business-to-Business and Consumer

Background: Taipei ITF brings the world to Taiwan and presents Taiwan to the world. The ITF B2B Travel Mart is staged on the day before the fair and the Taiwan Tourism Bureau specially invites international buyers to Taiwan to participate.

ITB Asia

Date: October 23-25, 2013

Location: Singapore

Type of Show: Business-to-business

Background: ITB Asia, a three day B2B trade show, is organized by Messe Berlin (Singapore) Pte Ltd and supported by the Singapore Exhibition & Convention Bureau.

WTM

Location: London, United Kingdom

Date: November 4-7, 2013

Type of Show: Trade

Background: Staged annually at ExCeL - London, WTM is a vibrant must-attend business-to-business event presenting a diverse range of destinations and industry sectors to global travel professionals. Worldwide buyers and sellers from every sector of the travel industry come together at WTM.

EIBTM

Location: Barcelona, Spain

Date: November 19-21, 2013

Type of Show: Business-to-Business

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

Vakantiebeurs

Date: January 15-19, 2014

Location: Utrecht, The Netherlands

Type of Show: Consumer

Background: The Vakantiebeurs is a major tourism and leisure fair. Many travel agencies, countries, theaters and cultural associations from all over the world present themselves and their countries here. Visit the exhibition and discover the most interesting and exciting destinations. Here something is presented for every audience, from vacation to adventure travel.

FITUR

Date: January 22-26, 2014

Location: Madrid, Spain

Type of Show: Trade & Consumer

Background: FITUR is a global meeting point for tourism professionals and the leading trade fair for inbound and outbound Ibero American markets. Exhibiting companies from many countries/regions, trade participants, the general public, and journalists from many countries meet during FITUR to transform leisure into business and business into development.

SATTE

Date: January 29-31, 2014

Location: New Delhi, India

Type of Show: Trade

Background: SATTE caters to travel, tourism and hospitality professionals, and provides opportunities to discuss and learn about economic trends in the airline industry and travel sector, opportunities for the hospitality industry, and how to leverage technology.

BIT**Date:** February 13-16, 2014**Location:** Milan, Italy**Type of Show:** Trade & Consumer**Background:** BIT is the only show in Italy that allows you to meet, in two very separate occasions, trade professionals and private travelers. Its multi-target formula brings in over 90,000 visitors in just 4 days, making each single second of attendance worthwhile.**ITB Berlin****Date:** March 5-9, 2014**Location:** Berlin, Germany**Type of Show:** Trade & Consumer**Background:** ITB Berlin is the world's largest tourism convention, ITB Berlin Convention is attended by tour operators, destinations, airlines, and hotels right through to car rental companies.**MITT****Date:** March 19-22, 2014**Location:** Moscow, Russia**Type of Show:** Trade & Consumer**Background:** MITT is Russia's leading and largest travel exhibition. With over 3,000 participating companies and 197 destinations, it is the key meeting place for the industry. Held since 1994, the event has become the main industry forum for travel professionals.**TUR****Date:** March 20-23, 2014**Location:** Gothenburg, Sweden**Type of Show:** Trade & Consumer**Background:** TUR is Scandinavia's leading fair for the travel, tourism and meeting industries. The annual TUR fairs run for four days at the end of March at the Swedish Exhibition & Congress Centre in Gothenburg. The Thursday and Friday are devoted to trade visitors, the Saturday and Sunday to the general public.**COTTM****Date:** April 9-11, 2014**Location:** Beijing, China**Type of Show:** Trade**Background:** COTTM remains the only business-to-business event that focuses purely on the Chinese outbound market.**WTM Latin America****Date:** April 23-25, 2014**Location:** Sao Paulo, Brazil**Type of Show:** Trade**Background:** World Travel Market Latin America is a three day business-to-business (B2B) event. Now in its second year, the event showcases one of the strongest growth markets for travel to the United States.**HITS****Date:** May-June 2014**Location:** Seoul, South Korea**Type of Show:** Trade & Consumer**ATM****Date:** May 5-8, 2014**Location:** Dubai, United Arab Emirates**Type of Show:** Trade**Background:** ATM is the place to do business in the Middle East. With over 17,000 visitors and almost 2,500 exhibitors, it is the leading travel trade event in the region.**IMEX****Date:** May 22-24, 2014**Location:** Frankfurt, Germany**Type of Show:** Trade**Background:** IMEX in Frankfurt is a worldwide exhibition for incentive travel, meetings and events. The comprehensive free education program and the Vision initiatives are designed to challenge conventional industry thinking, stimulate innovation and address key industry issues.**ABAV****Date:** September 14, 2014**Location:** Sao Paulo, Brazil**Type of Show:** Trade & Consumer**Background:** ABAV is organized by ABAV-Brazilian Travel Agencies Association, which represents the professionals who account for over 85 percent of sales in the sector. The fair features the entire range of exhibitors and visitors related to tourism.**JATA****Date:** September 14, 2014**Location:** Tokyo, Japan**Type of Show:** Trade**Background:** ATA is one of the largest tourism events in Asia. The Tourism Forum & Travel Showcase includes symposia and business meetings catering to the industry with consumer-oriented events and displays.

IFTM TOP RESA

Date: September 23-26, 2014

Location: Paris, France

Type of Show: Trade

Background: IFTM Top Resa is France's leading tourism event for networking, doing business, innovating and keeping abreast of market developments. The exhibition offers a 360° panorama of the travel industry, covering all sectors: leisure, business and events.

FITA

Date: September 25-28, 2014

Location: Mexico City, Mexico

Type of Show: Trade & Consumer

Background: FITA Mexico City, is the world-class international tourism fair that attracts the industry's most prominent leaders. The fair displays an important exhibition area, which hosts the top suppliers of national and international tourism services.

TTG INCONTRI

Date: October 9-11, 2014

Location: Rimini, Italy

Type of Show: Trade & Consumer

Background: TTG Incontri is the main international B2B exhibition on tourism in Italy. It is a marketplace for negotiations, networking and business between Italian and international companies and the intermediaries for tourist products.

AIME

Date: February 18-19, 2014

Location: Melbourne, Australia

Type of Show: Trade

Background: The Asia-Pacific Incentives and Meetings Expo (AIME) is a two day exhibition for those involved in organizing business travel, meetings, incentives and events. AIME is the largest international business expo in Australia. More than 750 exhibitors from 5 continents attend.

BITE

Date: June 27-29, 2014

Location: Beijing, China

Type of Show: Trade & Consumer

Background: Organized since 2003, Beijing International Tourism Expo is one of the fastest growing in the industry, attaining a quality ranking in Asia, and becoming an important and influential platform for tourism networking and business transactions. The three-day mega tourism event will continue to be the ideal venue for the international showcase of destinations, tourism attractions, travel packages, products and services.

WTM

Date: November 3-6, 2014

Location: London, United Kingdom

Type of Show: Trade

Background: Staged annually at ExCeL – London, WTM is a vibrant must-attend business-to-business event presenting a diverse range of destinations and industry sectors to global travel professionals. Worldwide buyers and sellers from every sector of the travel industry come together at WTM.

EIBTM

Date: November 18-20, 2014

Location: Barcelona, Spain

Type of Show: Trade

Background: EIBTM is the leading global event for the meetings and events industry. The event gathers over 15,000 industry professionals for three days of focused access to a 4dynamic business environment, thought provoking professional education and business networks.

TIANGUIS TURÍSTICO

Date: TBD

Location: Quintana Roo, Mexico

Type of Show: Trade

Background: The main objective of the Tianguis Turístico Mexico, is to encourage the promotion and marketing of Mexico's tourism products and services, to allow our country to increase the flow of visitors from domestic and international markets, thereby showing the products, the offering and the diversity in regard to tourism that Mexico has to offer to the world.

EXPOVIAJES CA

Date: March 7-9

Location: San Jose, Costa Rica

Type of Show: Trade & Consumer

Background: This fair is specialized in outbound tourism directed to the final consumer. Expoviajes contains all the products and services involved in the development of vacation and leisure travel. The fair is complemented by a specialized trading day between exhibitors and representatives of the corporate market, agents in-house travel, meeting planners and other buyers professionals.

Consumer Target and Media / Market Strategy and Campaign Elements

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

Brand USA Target: A25-59

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



AUSTRALIA
& NEW ZEALAND



BRAZIL



CANADA



CHINA



GERMANY



JAPAN



SOUTH KOREA



MEXICO



TAIWAN



UNITED KINGDOM

Consumer Campaign Schedule August 2013 through December 2014 by Market

Australia and New Zealand	January-February 2014
Brazil	June 2014, September 2014
Canada	January-February 2014, May-June 2014
China	October-November 2013, March-April 2014, October-November 2014
Germany	November-December 2013, January-February 2014, November-December 2014
Japan	March-April 2014, September-October 2014
Mexico	January 2014, March-April 2014, June 2014, October 2014
South Korea	May-June 2014, October 2014
Taiwan	October-November 2013, March-April 2014, October-November 2014
United Kingdom	January-February 2014, May 2014, September-October 2014

Note: Schedule subject to change to optimize media and market opportunities. Consumer campaign in Chile dependent upon Chile being selected for inclusion in the Visa Waiver Program. Timing for campaign launch in Russia TBD. Additional markets under consideration for expansion of the consumer campaign include France, Hong Kong, India, and Russia.

Media Market Strategy

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

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

The 2014 plan is to run brand media for the consumer campaign in market during peak travel planning times. Currently, the consumer campaign is running in Brazil, Canada, Mexico, United Kingdom & Japan. Additionally we are planning to add the following markets during FY14: Australia, Chile (pending visa waiver program review), China, France, Germany, Hong Kong, India, Russia, South Korea and Taiwan for a total of 15 markets during FY14.

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

Campaign Creative

Brand USA TV

The current plan is to utilize the Land of Dreams campaign creative. We are continually refreshing the creative executions and messaging with partners to develop Brand USA TV creative with greater partner integration. In addition, we are evaluating in-language execution of the "Land of Dreams" song in each respective market.

Partner Co-op TV

We are exploring more robust partner integration into our campaign. For example, we created a spot with British Airways to promote a seven-itinerary Megafam that took place in May 2013.

Optimizing Marketing Activities and Expenditures

To optimize investments in marketing and maximize reach, Brand USA disperses its activities across a multitude of tactics and channels. The mix varies by market according to what is best suited to local cultural and commercial conditions.

In addition to its branded campaigns designed to drive awareness and perceptions of the United States as a travel destination, we also engage in cooperative advertising programs with travel retailers, destinations, suppliers, and other partners to maximize reach.

The three broad categories of marketing efforts include:

- **Consumer Brand Marketing and Content**

These efforts include the core consumer “Land of Dreams” advertising campaign (TV, Out-Of-Home, Print, Digital, and Social Media). The campaign offers a variety of opportunities for partner integration. Through the planned campaign for FY14, Brand USA will be active in markets that drive more than 80 percent of all inbound travel to the United States.

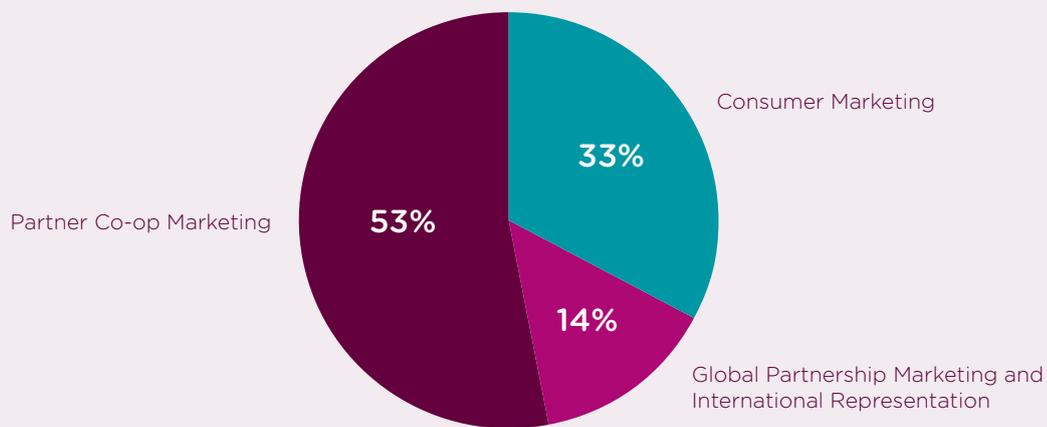
- **Partner Co-op Marketing**

Brand USA offers a variety of marketing-driven programs for partners to amplify their reach internationally through co-operative marketing opportunities. These programs make up the bulk of the Brand USA marketing program and include opportunities to create a direct call to action, drive international travelers to their destination, attraction, or brand—and measure the results of their efforts. Current co-op opportunities enable partners to leverage DiscoverAmerica.com to drive traffic and referrals to their organizations, engage in media planning and buying programs, create multi-channel programs, create customized in-country marketing initiatives, expand their media and travel trade networks, and other initiatives that make international marketing efforts more effective.

- **Global Partner Marketing and International Representation**

Through its Global Partner Marketing team, Brand USA is establishing international representation in the markets that drive 90 percent of all in-bound travel to the USA. In addition, this team creates opportunities for the travel trade and other organizations outside of the United States to support and benefit from the global marketing effort.

DISTRIBUTION OF MARKETING ACTIVITIES/EXPENDITURES



Approximately 33 percent of the FY14 marketing budget is allocated to brand marketing and content, 14 percent supports global partnership marketing and international representation that enables Brand USA to have a local presence and build partnerships with influencers around the world, and 53 percent is allocated to co-operative marketing efforts and programs in order to leverage (primarily domestic) partner synergies. As the United States is such a large and diverse collection of destinations, the marketing effort must balance broad national brand messaging with more targeted campaigns that point to specific areas of the United States. The practical scale of consideration for travelers is not the entire nation at once.



The Brand USA Team

THE BRAND USA TEAM

Christopher L. Thompson President & Chief Executive Officer

Yvonne La Penotiere
Chief Marketing Officer

GLOBAL PARTNERSHIPS

Alfredo Gonzalez
Senior Vice President
Global Partnerships

Jay Gray
Vice President,
Global Partnerships

Devon Dow
Manager, Global Partnerships

Suzana Durini
Manager, Global Partnerships

Anna Klapper
Manager, Global Partnerships

Allison Schneider
Executive Assistant

PARTNER SALES, PROGRAMS & SERVICES

Tom Garzilli
Senior Vice President

Amir Eylon
Vice President, Partner Services

Karyn Gruenberg
Vice President, Partner Programs

Patricia McNally
Director, Partner Services

Tiffany Waddell
Director, Sales

Dianne Turner
Regional Sales Manager
(Southeast)

Cassady Bailey
Partner Services Representative

Philip Joseph
Partner Services Representative

Brian Screptock
In-Kind Coordinator

Carol Billingsley
Executive Assistant

Tiwana Perry
Executive Assistant

RESEARCH AND ANALYTICS

Carroll Rheem
Vice President,
Research and Analytics

ADVERTISING AND MEDIA

Roberta Hatchett
Director, Advertising and Media

James Namude
Project Manager,
Advertising and Media

DIGITAL MARKETING

Jiri Marousek
Director, Digital Marketing

Talia Salem
Specialist, Social Media

Donald Richardson
Chief Financial Officer

Jake Conte
Director and In-House Counsel

Narciso Torrente
Director, Accounting

Blanca Romero
Office Manager

Brian Watkins
Manager, Information Technology

Odette Alvarez
In-Kind Coordinator

Marc Brooks
Contracts Assistant

Erika Gibson
Accounts Payable Coordinator

James Velasquez
Coordinator, Accounts Payable

Maria Kafarakis
Coordinator, Marketing & Billing

Jennifer Ross
Legal Assistant

Robyn Jordan
Executive Assistant to the CFO
and CMO

Rachael Pinguelo
Receptionist

Anne Madison
Chief Communications Officer

Camila Clark
Director, Marketing
Communications

Michael Fullerton
Director, Public Affairs

Aaron Wodin-Schwartz
Director, Public Policy

Judie Macalino
Executive Administrative Assistant,
Office of the CEO & CCO

BRAND USA BOARD OF DIRECTORS

CHAIR OF THE BOARD

Daniel Halpern

President and CEO

Jackmont Hospitality, Inc.

Elected Chair 8/15/13 for a one-year term beginning 10/1/13

Member: Finance Committee

Commission Expires 9/30/14

VICE CHAIR, OPERATIONS

Tom Klein

President and CEO

Sabre Holdings

Elected Vice Chair 8/15/13

Appointed Chair, Nominating & Governance Committee 8/15/13

Member: Finance Committee

Commission Expires 9/30/14

VICE CHAIR, MARKETING

David Lim

Railroad Marketing Executive

Former CMO, Amtrak

Elected Vice Chair 8/15/13

Appointed Chair, Marketing Committee 8/15/13

Member: Finance Committee

Commission Expires 9/30/13

Arne Sorenson (Treasurer)

President & CEO

Marriott International, Inc.

Elected Treasurer 8/15/13

Appointed Chair, Finance Committee 8/15/13

Commission Expires 9/30/15

Lynda Zengerle, Esq. (Secretary)

Partner

Steptoe and Johnson LLP

Elected Secretary 8/15/13

Member: Finance Committee, Audit Committee, and Nominating & Governance Committee

Commission Expires 9/30/13

Caroline Beteta

President and CEO

Visit California

Member: Marketing and Nominating & Governance Committees

Commission Expires 9/30/15

George Fertitta

CEO

NYC & Company

Member: Marketing Committee

Commission Expires 9/30/15

Randy Garfield

**Executive Vice President,
Worldwide Sales & Travel Operations
Disney Destinations, and
President, Walt Disney Travel Company**

Member: Audit and Marketing Committees

Commission Expires 9/30/13

Mark Schwab

**CEO
Star Alliance Services GmbH**

Member: Audit Committee

Commission Expires 9/30/13

Diane Shober

**State Tourism Director
Wyoming Office of Tourism**

Member: Governance & Nominating
and Marketing Committees

Commission Expires 9/30/14

Roy Yamaguchi

**Owner & Founder
Roy's Restaurant**

Appointed Chair, Audit Committee 8/15/13

Commission Expires 9/30/15

Board Committees

Committee Members Elected and Committee Chairs Appointed 8/15/13 for one-year terms beginning 10/1/13

Finance Committee	Audit Committee	Governance & Nominating Committee	Marketing Committee
Arne Sorenson, Chair	Roy Yamaguchi, Chair	Tom Klein, Chair	David Lim, Chair
Daniel Halpern	Randy Garfield	Caroline Beteta	Caroline Beteta
Tom Klein	Mark Schwab	Diane Shober	George Fertitta
David Lim	Lynda Zengerle, Esq.	Lynda Zengerle, Esq.	Randy Garfield
Lynda Zengerle, Esq.			Diane Shober

Our Partners

Brand USA gratefully acknowledges the generosity of its partners

Founding Partners (Contributions of \$1 million or more)

Air Canada	Louisiana Travel	TripAdvisor
Best Western International, Inc.	MacGillivray Freeman Films	United Airlines
British Airways	Marriott International, Inc.	Universal Studios Florida
Choose Chicago	Massachusetts Office of Travel and Tourism	US Travel Association
Discover Illinois	National Geographic	Virgin Holidays
Discover Los Angeles	NYC & Company	Visit California
Enterprise Holdings, LLC	Orbitz Worldwide	VISIT FLORIDA
ESPN	STA Travel	Visit Myrtle Beach
Expedia	Texas Tourism	Visit Orlando
The Guardian	Thomas Cook	Walt Disney Company
Hilton Worldwide	TTG Media	World Baseball Classic
Las Vegas CVA	Travelzoo	

Premier Partners (Contributions of \$500,000 to \$999,999)

Air Berlin	National Football League (NFL)	Screen Actors Guild
Arizona	National Parks Promotion Council	Starwood Hotels & Resorts Worldwide, Inc.
BS Fuji	New Mexico Tourism	Visit PA (Pennsylvania Tourism Office)
FTI Touristik	Preferred Hotel Group	Visit Seattle (Seattle Convention & Visitors Bureau)
Greater Miami and the Beaches	Visit San Antonio (San Antonio Convention & Visitors Bureau)	West Jet

Select Partners (Contributions of \$100,000 to \$499,999)

ABAV	Guam Visitors Bureau	PhoCusWright
American Express Company	Hawaii Tourism Authority	Travel Portland
Asiana Airline Inflight TRIAD IBS	High Lantern Group	Qantas Airways
Austin Convention & Visitors Bureau	Greater Houston CVB	Qatar Airways
Baxter Travel Media	IFTM Top Resa	Reader's Digest
Black Diamond	International Media Organizations (IMO)	Red and White Fleet / San Francisco Cruises
Visit Buffalo Niagara (Buffalo Niagara CVB)	Japan Airlines Co. Inc. (JAL)	ROAD ABC Media
Capital Region USA	Katten Muchin Rosenman LLP	Sabre Systems, Inc.
Carlson Rezidor Hotel Group	Las Vegas Sands Corporation	Scenic Tours
Charleston Area CVB	Mall of America	Sea World Parks & Entertainment, Inc.
Choice Hotels International	Meier's Weltreisen	Societa Geografica Italiana

Select Partners (Contributions of \$100,000 to \$499,999)

Cirque du Soleil (US) Inc	Memphis Travel (Memphis Convention & Visitors Bureau)	South Dakota Department of Tourism
CITM (Trade Show)	Pure Michigan	Southall Travel Limited
CityPass, Inc. (Southern State Tourism Offices)	Miles Media Group LLP	Travel South
Cleverdis	Missouri CVB (Missouri Division of Tourism, Dept of Economic Development)	Telegraph
Colorado Tourism Office	Visit Montana (Montana Office of Tourism)	The Beaches of Fort Myers and Sanibel (Lee County CVB)
Destination DC	Myrtle Beach Golf Holiday	Travel Market Insights
Diamond Resorts International	Travel Nevada (Nevada Department of Tourism & Cultural Affairs)	Travelocity Canada
Discover New England	New Orleans CVB	TravMedia
Discover South Carolina	New York State (I Love New York)	Turner Japan
Enfoque del Café	Ocean USA	US Virgin Islands
FITUR - Madrid	Travel Oregon (Oregon Tourism Commission)	Utah Office of Tourism
Fort Lauderdale Convention & Visitors Bureau	Osceola County DTD/Kissimmee	Visit Idaho (Idaho Division of Tourism Development)
General Growth Partners	Visit Philly (Greater Philadelphia Tourism Marketing Corporation)	Where Are You Now (WAYN)
Georgia Tourism	Philadelphia Convention & Visitors Bureau	Wyoming Office of Tourism

Preferred Partners (Contributions up to \$99,999)

Accor North America	Finger Lakes Regional Tourism Alliance	Minnesota Office of Tourism	Sports Travel Magazine
Agaxtur Turismo	Visit Finger Lakes (Finger Lakes Visitors Connection)	Mississippi Gulf Coast	Springfield CVB
Akron/Summit	Flexible Trips	Mississippi River Country USA	St.Petersburg / Clearwater CVB
Alabama Tourism Department	Flightcentre UK Ltd	Mode Tour	St. Tammany Tourist & Convention Commission (Louisiana's Northshore)
Alaska Department of Commerce	Florence/Lauderdale Tourism	Modern Management Services, LLC	Station Casinos
Alaska Travel Industry Association	Fort Worth CVB	Monark Turismo	Sunwing Vacations Inc.
State of Alaska (DCCED)	Fredericksburg, VA	Mountain News Corporation	Visit Syracuse (Syracuse Convention & Visitors Bureau)
Alton Convention & Visitors Bureau, Greater (ILC)	G Adventures	Mt. Hood Territory (Oregon)	TAM Airlines
Amalfi Hotel Chicago (Hostmark)	Gettysburg, PA	Mundo Turistico	TAM Viagens
America As You Like It	Go Rockford	Napa Valley	TAP PORTUGAL
America Unlimited GmbH	Go West	Nascimento Turismo	Tennessee Department of Tourist Development

Preferred Partners (Contributions up to \$99,999)

American Airlines	Grand Canyon Railway	Nashville	TGG - WTM
American Holidays	Great River Road Illinois (Macomb)	National Parks Promotion Council	The Henry Ford (Michigan)
America's Cup Event Authority	Great Rivers Country	Visit Nebraska	The Holiday Place
Amerika Journal	Greater Boston CVB	New England Inns & Resorts Association	The Independent
Amtrak	Group Tour America	New Hampshire Division of Travel & Tourism Development	Tom on Tour/ Gayfriendly USA Guide
Anaheim CVB	Guam Visitors Bureau	Visit New Haven	Tour America Inc.
Visit Anchorage	H.I.S. Co., LTD.	Newport Beach	Tour Magazine
Andar de Viaje	Hanna Tours	Niagara Tourism	Tourism Economics
Annapolis and Anne Arundel County CVB	Harrisonburg TVS	Nihon Ryoko	TradeTours
Archers Direct / Cosmos Air	Hayes and Jarvis	Nippon Travel Agency Co., LTD	Trailfinders
Arizona Office of Tourism	Hersha Hospitality	Nissan	Transatlantic Elite LLC
Arkansas Department of Parks	Hertz	North America Travel	Travel Guard Worldwide
Arlington, TX	Hilo Convention Bureau	North American Journeys	Travel Iowa
Asheville CVB	Hilton Head CVB	Visit NC (North Carolina Division of Tourism)	Travel Kansas
Ashford Hospitality Trust LP	Horizon Travel Magazine	North Dakota Tourism	Travel Weekly Group
Aspen Snowmass	Hornblower Cruises	Northwood Investors	Travelbag Ltd.
Atlanta CVB	Host Hotels & Resorts, Inc.	Novak Birch	Travelbiz
ATM	Houma Area Convention & Visitors Bureau	NTA	Travelocity
Auckland International Airport	House and Garden	Ohio Tourism	Travelsphere
AviaReps Marketing Garden	Huntsville/Madison CVB	Oklahoma Tourism & Recreation	TravelZoo
Avis	Hyatt Hotels	Oneida County Tourism	Travora Media
B*For	Iceland Air Scandinavia	Opentours	Trek America
Barrhead Travel	Discover Illinois (Illinois Office of Tourism)	Orlando Flex Ticket	TripTuner
BIT - Milan	Indiana Office of Tourism	Outdoor Revolution Ltd.	Trump Int'l Hotel & Tower Las Vegas
Bloomington CVB	Visit Indy (Indianapolis)	Palm Beach County	Tucson CVB
Bowling Green, KY	Intercontinental The Barclay New York	Palm Coast and Flagler Beaches	TUI Specialist Holiday Group
Branson, MO	Interstate Hotels & Resorts, Inc.	Palm Springs Area CVB	TUI Suisse
Brasil Travel News	Intrepid Travel	PanRotas	TUR Gothenburg
Caesars Entertainment	Irvine Company Retail Properties	Papillon Group - Grand Canyon Tours	Ultra Travel
California Academy of Sciences	ITB - Berlin	Pasadena CVB	UM Detroit
Canada Reise Dienst	Jackson Hole Mountain Resort	Patton Boggs LLP	United Airlines and Hana Tour

Preferred Partners (Contributions up to \$99,999)

Canadian Traveler	Jacksonville	Visit Phoenix (Greater Phoenix CVB)	United States Chamber of Commerce
Canusa	Jalpak Co., Ltd.	Phoenix International Publishing, LLC	US Airways
Cape Cod Chamber of Commerce	Jay Peak Resort	Visit Pittsburgh	Utah Office of Tourism
Central Intercambio	Jekyll Island Authority, GA	Plymouth County CVB	Vail Resorts Management Co
Central Oregon Visitors Association	Jetline Travel	PM Publishing Solutions	Veolia Transportation
Champaign County CVB (ILC)	JTB World Vacations	Pocono Mountains Visitors Bureau	Vermont Department of Tourism
Visit Charlotte	Kailua-Kona CVB	Pontiac, IL	Virgin Atlantic
Chicago North Shore CVB (ILC)	Kansas City CVB	Premium Outlets	Virginia Beach CVB
Chickasaw Nation	Kansas Department of Wildlife, Parks & Tourism	Prince William County	Virginia Tourism Corporation
Cincinnati USA	Kauai CVB	Puerto Rico Tourism	Visit Anchorage
CISG	Kentucky Tourism	Quad Cities CVB (ILC)	Visit CA - Air New Zealand
Positively Cleveland	Kiawah Island Golf Resort	R&C Tours Co. Ltd.	Visit Colorado Springs CVB
Colorado Ski Country	Kinki Nippon Tourist Co., Ltd.	Raleigh CVB	Visit Connecticut
Colorado Springs	Kintetsu International	Rate Tiger	Visit Denver
Experience Columbus (Ohio)	KLM Royal Dutch Airlines (Finland)	Red Lion Anaheim Maingate	Visit Detroit
Connect Worldwide International	Knecht Reisen	Red Roof Inns, Inc	Visit Honolulu
Convention News Television	Kuoni	Red Tetterer	Visit Idaho
Copa Vacations	Kwik Travel	Redding, CA	Visit Indiana
Corning Museum of Glass	Lafayette Convention & Visitors Commission	Reservationsystem.com/ Bookit.com	Visit Indy
Cosmopolitan Las Vegas	Lake Charles Convention & Visitors Bureau	Rhode Island Office of Tourism	Visit Maine
Cruisenation.com	Lake Havasu	Richmond CVB	Visit Napa Valley
CVC Viagens	Lakes Region Tourism Association	RLJ Lodging Trust	Visit New Hampshire
Visit Dallas	Land of Lincoln Regional Tourism Dev Office (ILC)	Rockford Area CVB (ILC) (Go Rockford)	Visit New Jersey
Delaware North Companies	LAX Airport	Rocky Mountain International	Visit North Carolina
Delaware Tourism Office	LEDTV	San Diego CVB	Visit Oklahoma
Delta Airlines	Let's Travel Magazine	San Diego International Airport	Visit Richmond
DERTOUR	Liftopia	Visit San Francisco	Visit Rochester
Despegar.com	LimeTree Media	San Juan Islands, WA	Visit USA Russia
Detroit Metro CVB	Little Rock	San Marcos Convention & Visitors Bureau	Visit USA Spain

Preferred Partners (Contributions up to \$99,999)

Diversity Tourism UG	Lonely Planet	Santa Barbara CVB	Visit West Hollywood
DMAI (Destination Marketing Association International)	Visit Loudon County	Santa Cruz County Conference and Visitors Council	Visit Oakland
DNC Parks and Resorts at Yosemite	Love Beverly Hills	Santa Fe CVB	Warren County, OH
Donohoe Hospitality Services	LVH Hotel Las Vegas	Santa Monica CVB	Washington Tourism Alliance
Discover Dupage	Macon, GA	Visit Sarasota	Watkins Glen International
Durango, CO	Macy's	SATTE	West Hollywood Marketing & Visitor's Bureau
Econo Lodge Times Square	Maine Office of Tourism	Visit Savannah	West Virginia Tourism (West Virginia Department of Commerce)
Elvis Presley Enterprises	Mammoth Lakes Tourism	Schneider / Sports Travel	White Mountains Attractions (NH)
Empire Hotel	Marianas Tourism Board	Scottsdale CVB	White Pass Scenic Byway - WA
Empire State Building Observatory	Marriott Vacation Club International	Sedona Chamber of Commerce	Wiechmann Tourism Service
enVision Hotel	Martin County	Serino/Coyne	Williams Grand
ES Tour	Maryland Office of Tourism	Shenandoah Valley Travel Association	Wine, Water, Wonders
Essentially America	Maui CVB	Shop America Alliance	Wisconsin Department of Tourism
Explore Saint Louis	Meet Chicago Northwest (ILC)	Smithfield Source Media	WTM - London
Explorer Fernreisen	Meltwater	SoftTravel	Wynn Las Vegas
Explore Fairbanks	Mendocino County	Sonoma County Tourism	Yosemite National Park
Fairmont Hotels & Resorts	MGM Mirage Las Vegas	South Street Seaport & Museum	Yosemite Sierra
Fairmont Raffles Hotels Int'l Pte Ltd	MGM Resorts	Space Coast, FL	Yosemite/Mariposa County Tourism Bureau
FelCor Lodging Trust Incorporated	Explore Minnesota	Visit Spokane	

Our Shared Commitment

As we execute the strategies outlined in our business plan this year and for years to come, our shared commitment is that we will conduct our business with integrity, in collaboration with key stakeholders, and with a focus on results.

We will accomplish this by demonstrating our commitment to our mission, our vision, and our values—and continually working to create and pursue a shared vision with all of our public and private partners.

Integrity and Transparency

First and foremost, we will meet the requirements of the Travel Promotion Act—in both the letter and spirit of the law.

We will work to do the right thing in our day-to-day operations, and are committed to fiscal integrity, accountability, and sound financial management through transparency and collaboration with our government partners.

We will provide timely updates on our progress and open access to information that the public, our partners and government officials are entitled to request and receive.

We will establish and follow a clear and rational valuation and submission process for evaluating in-kind contributions and receiving matching funds for cash and in-kind contributions.

We will follow procurement processes and policies that demonstrate our commitment to integrity, transparency, and doing what's best for our partners and the achievement of our long-term mission.

Collaboration

We will develop a superior understanding of what our partners need and want—with a focus on doing what local tourism and travel entities cannot do for themselves and providing programs that support their ability to achieve their strategic objectives as we pursue our mandate of welcoming more international travelers to the USA.

We will work collaboratively with our stakeholders to develop innovative programs and initiatives that support our mission.

We will only offer and promote programs once all parties have a clear understanding of how they work, their intended results, and how they will be valued and matched with public funds, as well as what the specific requirements, roles and responsibilities are of each party to execute these programs, including having all required agreements in place and fully executed in advance.

We will develop close, mutually productive relationships with our program partners, suppliers, the travel industry, and the U.S. government and will work with each of them in ways that are good for all of us.

We will communicate early and often with all of our stakeholders—with an unwavering goal of building trust by sharing information and seeking input on an ongoing basis.

Superior Marketing and Teams that Drive Results

We will develop superior marketing capable of giving us a clear and sustainable advantage as we compete for a growing share of international in-bound travelers.

We will build high-caliber talent internally and a strong network of in-country market representation to best maximize our marketing reach, efficiency and effectiveness in key markets that have the most potential to increase international visitation to the United States.

We will demonstrate a strong return on investment for all of our activities by reporting the results of our efforts and campaigns with qualitative and quantitative data based on sound market research, analysis, and pre-established metrics that support our reason for being.

We will focus our efforts on programs, marketing, and collaborative, open communication as mandated by the Travel Promotion Act—leaving politics to those organizations and individuals that have that right and responsibility.

As a leadership team, and on behalf of everyone at Brand USA, we fully recognize and respect the compelling case for marketing the United States as a premier travel destination in order to strengthen our nation's economy by generating hundreds of thousands of jobs annually.

While specific objectives, goals, timelines, budgets, accountabilities, and results will be published each year in our business plan, we realize that the true measure of our success will be the degree by which we increase international visitation and spend and our country benefits in economic prosperity and growth as a result of our efforts.

Together we are Brand USA.

Christopher L. Thompson

President & CEO



Yvonne La Penotiere

Chief Marketing Officer



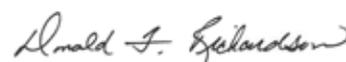
Anne Madison

Chief Communications Officer



Donald Richardson

Chief Financial Officer



Key Contact Information

Our Social Media Channels

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

Travel Industry Information

@BrandUSA on Twitter

Consumer Information

@DiscoverAmerica on Twitter

Facebook.com/DiscoverAmerica

Our Websites

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

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



DiscoverAmerica.com

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