



FY15 BUSINESS PLAN

for the period October 1, 2014 through September 30, 2015



DiscoverAmerica.com

Brand USA



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Letter from the President and CEO



Dear Partners in Travel:

We are pleased to present Brand USA's business plan for fiscal year 2015 (October 1, 2014-September 30, 2015). 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 new international 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.

Brand USA made significant progress in FY14 as it globalized its footprint: the direct-to-consumer campaign expanded to 10 markets and nine languages; cooperative marketing platform grew to more than 100 programs and 200 opportunities; our international representation network increased to 12 offices covering 20 markets; and our in-market travel trade activity expanded to include a robust offering of training, events, sales missions, and MegaFams. As this footprint continues to expand, in FY15 Brand USA will be active in at least one of these three areas in more than 33 key travel markets that make up more than 90% of inbound travel to the United States.

During FY14, Brand USA also began measuring its impact on macroeconomic outcomes in addition to ad tracking, digital metrics, and efficiency of media mix. A study conducted by Oxford Economics revealed that during FY13 Brand USA created an additional 1.1 international visits from the eight markets in which it was fully deployed across direct-to-consumer advertising, travel trade outreach and cooperative marketing platforms. These additional visitors spent \$3.4 billion, leading to \$7.4 billion in total economic activity and support for more than 53,000 U.S. jobs. In total, this amounts to a marketing ROI of 47:1 and to nearly

\$1 billion in incremental local, state and Federal tax receipts. Brand USA will continue to produce a robust set of metrics on its impact on macroeconomic outcomes as well as tactical feedback on ad efficiency, media mix, cooperative marketing performance, and more.

These successful results are echoed by the continued outpouring of support from the travel industry. From FY12 to FY13, Brand USA enjoyed a 97% partner retention rating while growing from 87 partners to more than 300 partners.

Brand USA continues to fulfill its role as the nation's public-private destination marketing organization by aligning its efforts in support of the National Travel and Tourism Strategy. Brand USA and its Federal partners have jointly executed an impressive array of activities to communicate visa and entry policy and promote our national treasures. The marquee example of this collaboration was the launch of the Discover America: Great American Food Stories culinary guide with the U.S. Department of State, which utilized renowned American chefs to invite the world to see the United States in a whole new light. As we look toward the Centennial of the National Park Service in 2016, the giant screen film is another high-profile example of this collaboration that will be a defining collaboration in the coming year.

The work we do is more than just about marketing the USA as 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, strengthen the foundation of communities across the country, and enhance the image of the United States around the world.

Brand USA is focused on adding and creating 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. L. Thompson'. The signature is fluid and cursive, written on a white background.

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 US 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.

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 influence 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 US 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 US Department of Commerce Travel and Tourism Advisory Board, and the US 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.

LEADERSHIP ROLES IN THE TRAVEL INDUSTRY TO INCREASE INBOUND TRAVEL TO THE UNITED STATES



PROMOTE

- Lead the nation’s global marketing effort to increase inbound travel to the United States
- Enhance awareness and the image of the USA as a diverse, exciting, and premier travel destination
- Create programs and platforms that add and create value for partners and support the National Travel and Tourism Strategy
- Work with the Federal agencies to develop programs to communicate U.S. entry and security processes and create a welcoming experience for international tourists

ADVOCATE

- As the leading voice of the U.S. travel industry, increase travel to and within the United States
- Advocate for and advance pro-travel policies and remove travel barriers
- Provide authoritative research and networking opportunities
- Communicate the positive widespread impact of travel to policy makers and the media
- Leverage the collective strength of everyone who benefits from travel to grow their business beyond what they can do individually

Travel and Tourism Advisory Board
Advise and provide policy recommendations
to the Secretary of Commerce on issues
affecting the U.S. travel industry



THE PLAN



Situation Analysis

Global Perspective

Economic trends present both opportunities and challenges

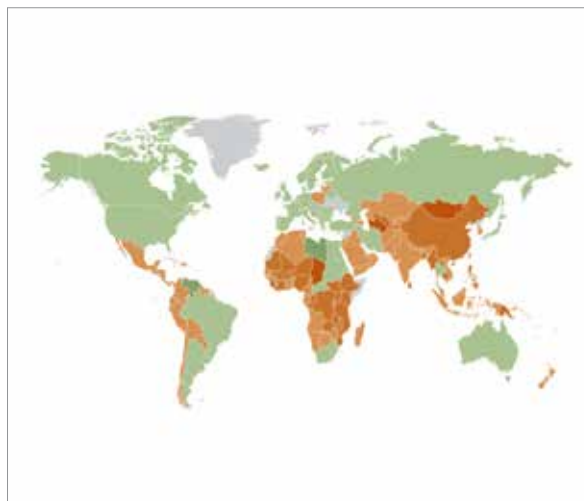
Markets around the world are expected to achieve relatively stable economic footing in 2014. According to the International Monetary Fund, the world's GDP will grow by 3.6% in 2014 (Chart 1). Emerging economies will grow at more than double the pace of advanced economies at 4.9% versus 2.2%, respectively. European markets that struggled to make progress in 2013, such as Spain (-1.2%) and Italy (-1.9%), are expected to regain positive momentum this year. A handful of countries are expected to recede in 2014, but only one - Venezuela (#13 in 2013) - represents a significant source of visitors for the US. The overall economic environment is one conducive to sustained modest growth over the next several years.

According to the UNWTO, the US is by far the largest destination in terms of tourism receipts and is continuing to widen its lead. In 2013, US receipts grew by 10.6% compared to Spain at 7.4% and France at 4.8%. Macao, Thailand and Hong Kong ranked 5, 7, and 10 respectively in 2013 and are growing dramatically. Fueled by intraregional growth in Asia,

these destinations will continue to gain market share over the next decade. Competing for Asian travelers will become ever-more challenging as regional markets build out a greater range of tourism attractions at affordable price points and shorter distances.

The main driver of growth in Asia, China became the world's largest outbound travel spender in 2012, and continues to grow far faster than the world average (23.8% in 2013). At \$128.6 billion, China contributed over 11% of the world's tourism expenditure in 2013. There is no question that China represents an attractive target market not only for the US, but also for all top travel destinations around the world. The unique cultural and commercial environment, in addition to stiff competition, make China a challenging but critically important market for the US. Nevertheless, the phenomenal growth coming from China is decelerating and is likely to fall into the teens in the next several years. Avoiding mis-targeting and over-investment is a key objective for Brand USA's market and media allocation.

CHARTS 1 & 2



<http://www.imf.org/external/datamapper/index.php>

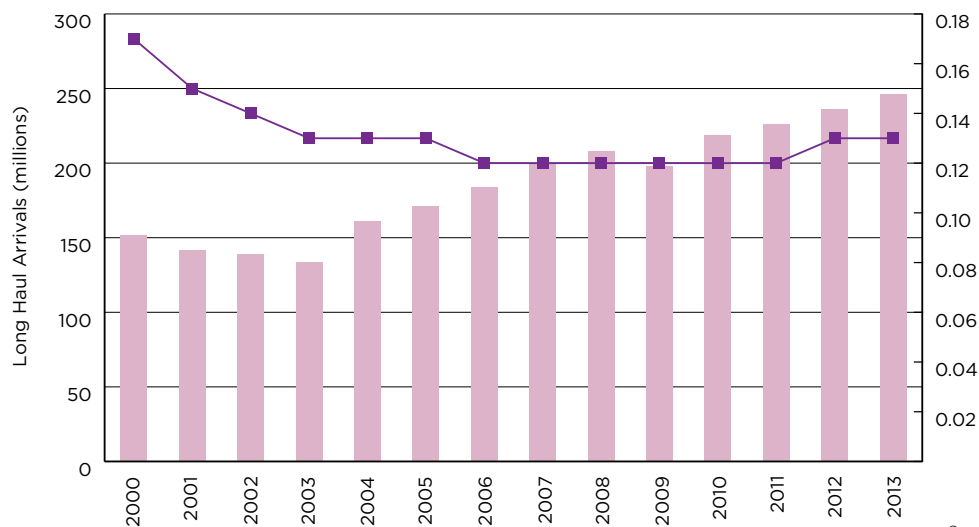
Global Perspective

US begins to regain market share momentum

While tracking arrivals is the foundation for viewing our performance, it misses an important point of context. Global trends provide a critical benchmark and simple way to demonstrate our potential. “The Lost Decade” from 2000-2010 reflects a period during which the US

suffered a dramatic loss of travel market share. The US gave up 30% of its share of long haul travel by 2006 and stagnated at the same level for another four years (chart 3). Breaking the cycle required more than what the private sector was achieving on its own.

CHART 3: GLOBAL LONG HAUL ARRIVALS AND US MARKET SHARE



Source: Oxford Economics, NTTO

Brand USA was created as part of the first-ever public-private coordinated effort under the National Tourism Strategy to help the US regain share of the world travel market. And it's clearly working.

1.1 million visitors

\$3.4 billion in visitor spending

total impact on economy **\$7.4 billion**

53,181 new jobs supported

47:1 For every \$1 spent Brand USA generated \$47 for U.S. companies

8 markets*

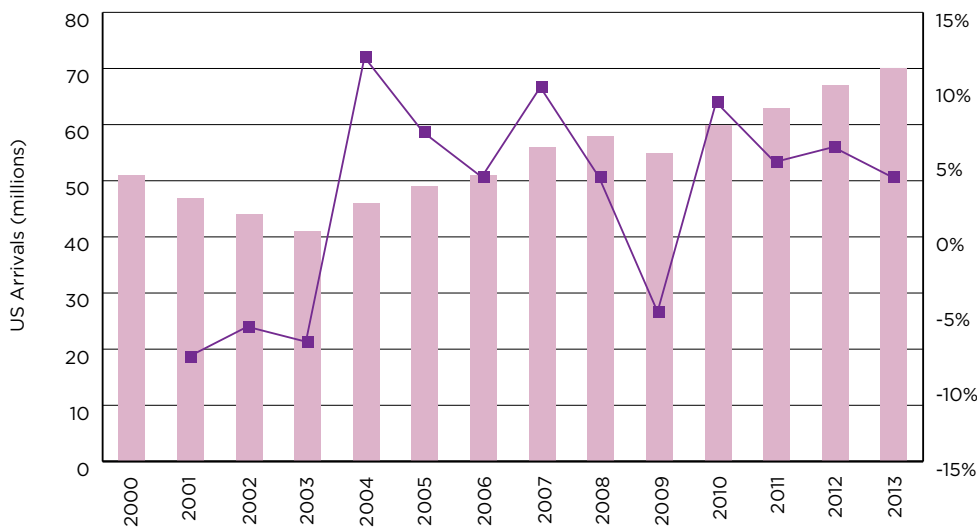
US Perspective

US Arrivals: Stable but modest outlook

While economic stability clearly has a positive impact on the travel industry, it is accompanied by moderate growth rates. Chart 4 displays US international arrivals 2000-2013 as well as the annual growth rate. The dramatic growth seen in 2004 represents recovery from a sustained loss over several years. It took another couple of years (until 2006) to reach 2000's volume - the rest of the world did it in 2004. In comparison, the financial crisis of 2009 was far less impactful

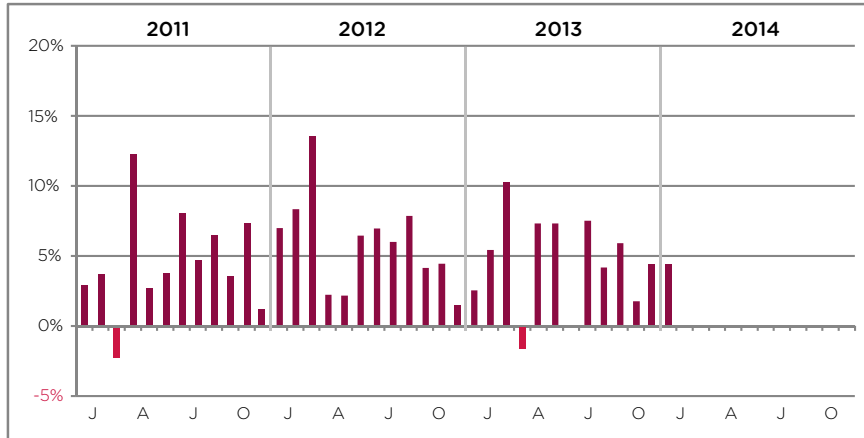
- arrivals more than made up the lost ground in 2010. Considering the severity of the global financial crisis in 2009, comparison of 2010's bounce-back to the post-9/11 period demonstrates the disproportionately severe impact the event had on the US travel industry. Now that the world has transitioned from recovery to stability, we expect growth rates to remain below 5% for the next several years.

CHART 4: US INTERNATIONAL ARRIVALS AND GROWTH



Source: NTTO

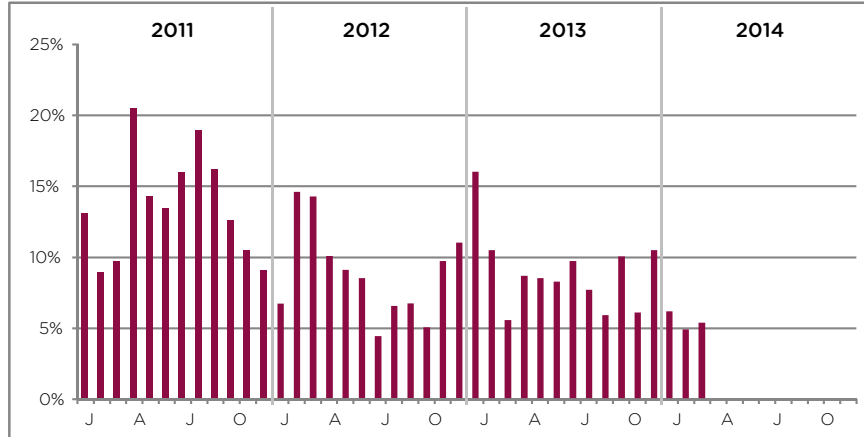
International Travelers to the USA
 (% change same month previous year)



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

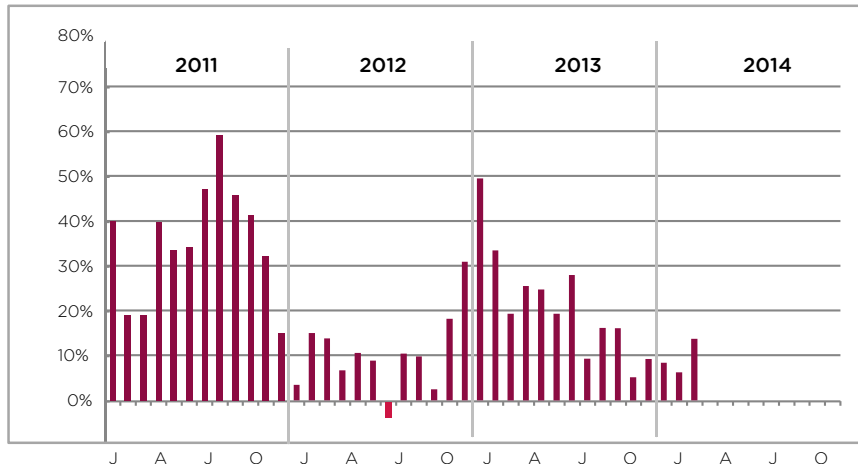
International Traveler Spending in the USA (exports)
 (% change same month previous year)



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).

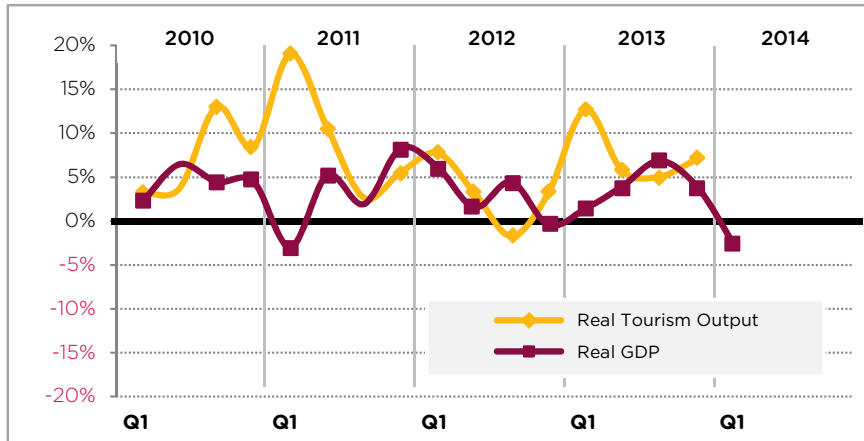
Travel Trade Balance
(% change same month previous year)



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).

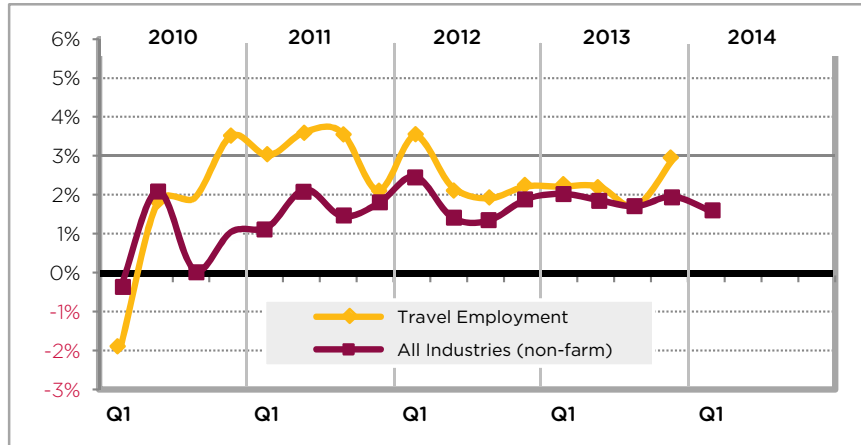
OUTPUT: Travel Industry vs. All Industries
(quarterly change rate of annualized data)



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.

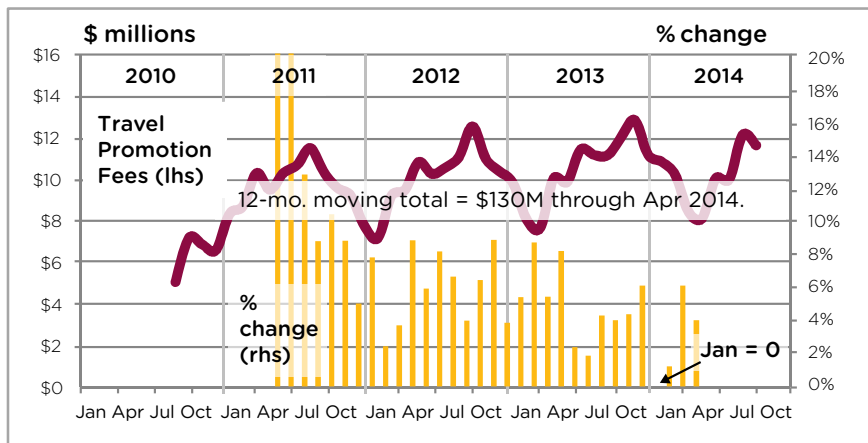
EMPLOYMENT: Travel Industry vs. All Industries
 (quarterly change rate of annualized/seasonally-adjusted data)



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.

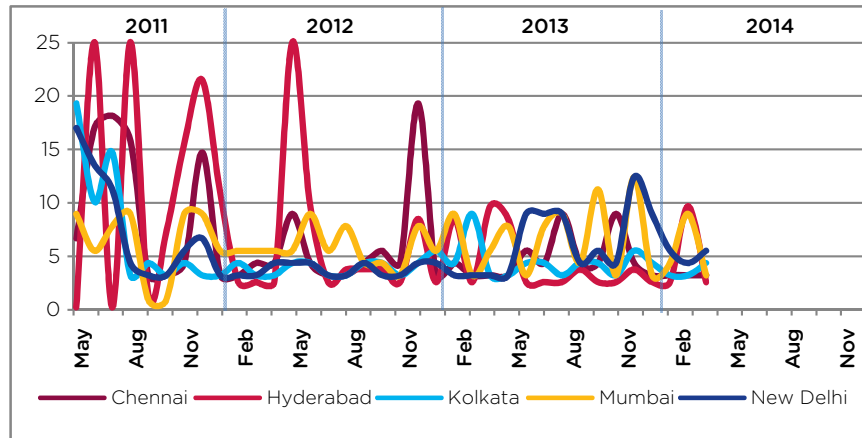
ESTA Travel Promotion Fees Collected
 (lhs: \$millions; rhs: % change same month previous year)



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. First year-over-year %s are greater than 20%.

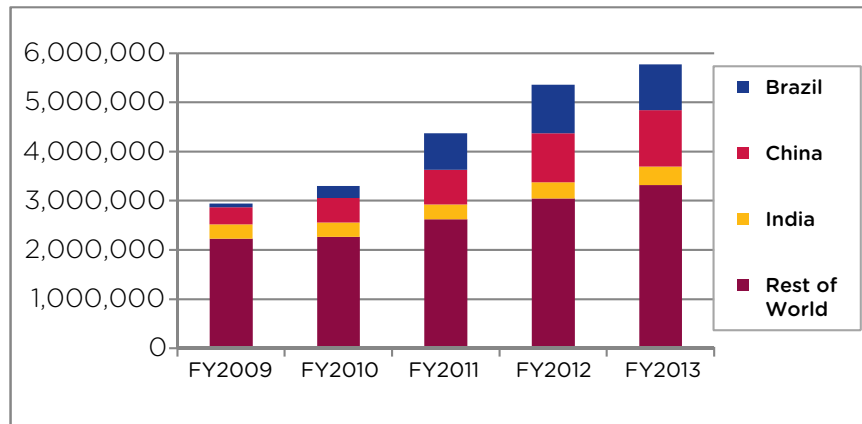
Visa Interview Wait Time: INDIA
(days)



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.

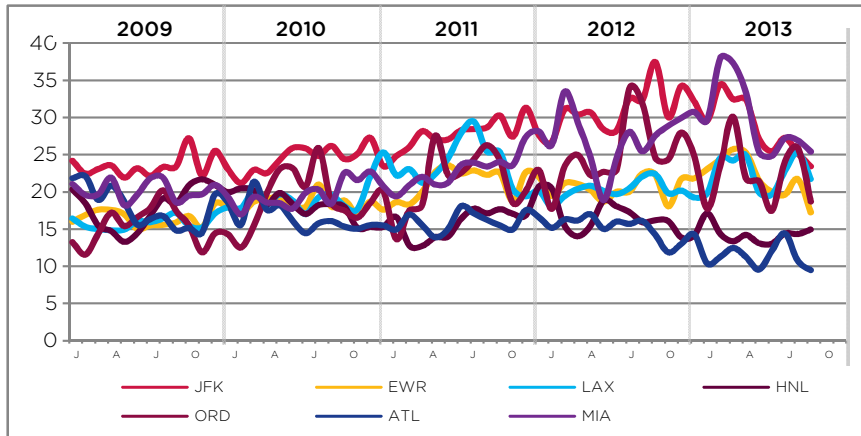
B1/B2 Short-Term Tourist and Business Travel Visas Issued
(number of B1/B2 travel visas issued in fiscal year in China, Brazil, India, and the remainder of visa-issuing posts worldwide)



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 2009-2013 in China, Brazil, India, and worldwide.

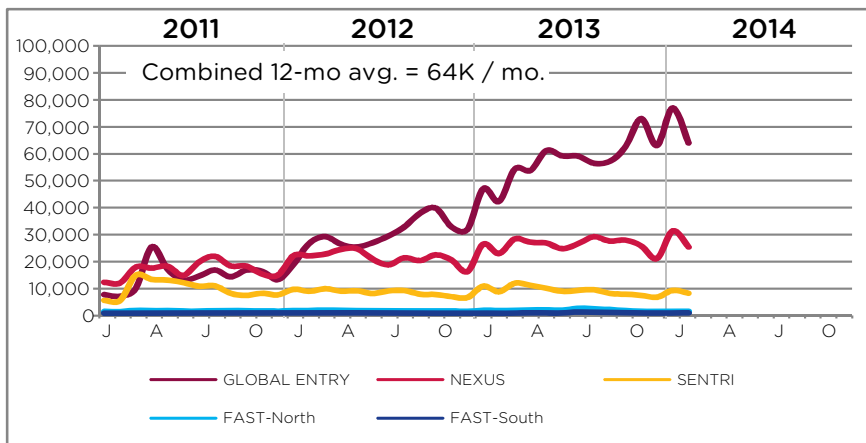
**International Arrivals Processing Times by Port of Entry
(minutes)**



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

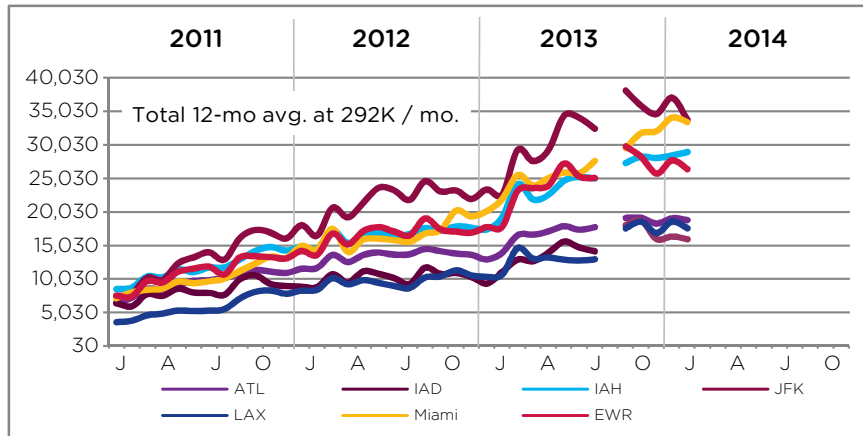
Notes: CBP recommends travelers consult the CBP website http://www.cbp.gov/xp/cgov/travel/wait_times/ for relevant information about wait times.

**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
2012 Actual	6.1%	19%	35%	9%
2013 Actual	4.7%	15%	23%	19%
2014 Forecast	3.5%	9%	21%	12%
2015 Forecast	4.1%	11%	19%	11%
2016 Forecast	3.9%	8%	19%	9%
2017 Forecast	3.8%	7%	18%	7%
2018 Forecast	3.4%	7%	18%	6%

Source: U.S. Department of Commerce, Office of Tourism Industries.
Spring 2014 forecast

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

Airline Capacity (available seats)
(% change previous year)

	Brazil	China	India
2013-11	3%	18%	19%
2013-12	4%	24%	22%
2014-01	4%	21%	20%
2014-02	-1%	17%	4%
2014-03	-4%	16%	5%
2014-04	6%	17%	4%
2014-05	14%	15%	4%
2014-06	14%	24%	4%
2014-07	10%	26%	4%
2014-08	10%	25%	4%
2014-09	11%	14%	4%
2014-10	16%	10%	4%

Source: U.S. Department of Transportation; FAA / INNOVATA, Inc. (2014-06-02)

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.

Top 10 Markets

Brand USA is focused on markets that supply international travelers to the United States. Throughout 2015, 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.

2013 International Visitation to the USA

RANK	COUNTRY	2013 ARRIVALS
1	 CANADA (+3%) Canada improved its position as the arrivals leader, setting a volume record for the 4th consecutive year and providing 690,000 additional visitors. The bulk of the 3% increase was from the small one-night auto segment, which was up 19% for the year and which began registering big increases coinciding with the June 2012 duty-free exemption increase. Canada accounted for a 33.5% share of 2013 visitor volume.	23.39 MILLION
2	 MEXICO (+1%) In 2013, Mexico came within 140,000 visits of breaking its 2007 record for arrivals to the United States, in spite of an ongoing trend of less than robust growth since 2007. As usual from this market, monthly performance throughout the year produced no discernible patterns. Mexico accounted for a 20.6% share of 2013 visitor volume.	14.34 MILLION
3	 UNITED KINGDOM (+2%) United Kingdom's visitor volume was up in 2013 for the first time in 5 years. While encouraging, visitor volume remains down 870K from the 2000 peak of 4.7 million. Monthly moving averages have turned increasingly positive, providing a bullish outlook for the start of a new travel year—the first in many years. The U.K. accounted for a 5.5% share of 2013 visitor volume.	3.84 MILLION
4	 JAPAN (+1%) Japan's visitor volume grew just 1% in 2013, remaining well below its 1997 record of 5.4 million visitors. Japan's modest performance in 2013 followed sharp increases in visitation to the United States (14%) and to the world in 2012. Japan accounted for a 5.3% share of 2013 visitor volume.	3.73 MILLION
5	 BRAZIL (+15%) Brazil registered another double-digit growth rate in 2013. This performance was in line with expectations and extends the growth streak to 10 years. The result is a 4th consecutive record for arrivals. Brazil has now registered double-digit growth in 9 of the past 10 years, and in 2013 surpassed Germany for the #5 spot of top visitor origin markets. Brazil accounted for a 3.0% share of 2013 visitor volume.	2.06 MILLION
6	 GERMANY (+2%) Germany once again flirted with breaking the long-standing volume record set in 1996 by registering a 2% increase in 2013—the 4th consecutive year of positive volume growth. Germany accounted for a 2.7% share of 2013 volume.	1.92 MILLION
7	 CHINA (+23%) China's 23% increase in 2013 visitor volume was slightly lower than expectations, but was easily the largest growth rate among the top ten countries. China jumped two places in ranking in 2012; and its growth rates have been between 19% and 53% in 9 of the last 10 years. China accounted for a 2.6% share of 2013 visitor volume.	1.81 MILLION
8	 FRANCE (+3%) True to form, France's visitor volume performance was counter to expectations. The 3% growth in 2013 easily beat the NTTD forecast of a small decline and set a new volume record by barely exceeding the 2011 previous record level. France accounted for a 2.2% share of 2013 visitor volume.	1.50 MILLION
9	 SOUTH KOREA (+9%) South Korea registered another solid increase in 2013 to set a 4th consecutive arrivals record. Since inclusion in the Visa Waiver Program in late 2008, South Korea's annual performance had been uneven at -2%, +49%, +3%, but is now a stable +9% for the 2nd consecutive year. South Korea accounted for a 1.9% share of 2013 visitor volume.	1.36 MILLION
10	 AUSTRALIA (+7%) Australia had a strong 7% increase in 2013 registering its 9th straight record year. This market has produced monthly performance growth in 46 of the past 48 months—one of the best performances of any origin country. Australia accounted for a 1.7% share of 2013 visitor volume.	1.21 MILLION

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.

2013 International Visitor Spending in the USA

RANK	COUNTRY	2013 ARRIVALS
1	 CANADA (+6%) Canada remained the undisputed heavyweight in terms of annual spending on U.S. travel and tourism-related goods and services. Visitors from Canada injected a record-breaking \$27.0 billion into the U.S. economy in 2013, an increase of nearly \$1.5 billion (6%) when compared to 2012. Travel and tourism exports account for 42% of all U.S. services exports to Canada.	\$27.0 BILLION
2	 JAPAN (+9%) Japan's visitor volume grew just 1% in 2013, remaining well below its 1997 record of 5.4 million visitors. Japan's modest performance in 2013 followed sharp increases in visitation to the United States (14%) and to the world in 2012. Japan accounted for a 5.3% share of 2013 visitor volume.	\$18.0 BILLION
3	 UNITED KINGDOM (+8%) Devastated by the global economic slowdown, U.S. travel and tourism exports to the United Kingdom plummeted by nearly a third (32%) in 2009 and have been slow to recover. Indeed, U.K. resident spending in the United States is down \$3.0 billion when compared to 2008 (the only top-10 country to not set a 2013 record). Travel and tourism exports account for 23% of all U.S. services exports to the United Kingdom.	\$13.7 BILLION
4	 MEXICO (+5%) Travelers from Mexico spent a record-breaking \$10.5 billion experiencing the United States in 2013, an increase of more than 5% from the previous year. Visitor spending has, however, been increasing at a decreasing rate, so Mexico might be hard-pressed to maintain their 4th place ranking in 2014. Travel and tourism exports account for 36% of all U.S. services exports to Mexico.	\$10.5 BILLION
5	 BRAZIL (+13%) After a decade of double-digit growth (every single year!), Brazil has securely positioned itself as the 5th largest market for U.S. travel and tourism exports and is expected to surpass Mexico next year in terms of total spending, falling a mere \$33 million shy from surpassing Mexico in 2013. Travel and tourism exports account for 42% of all U.S. services exports to Brazil.	\$10.5 BILLION
6	 CHINA (+12%) After four consecutive years of double-digit growth, China set another spending record in 2013, having spent nearly \$9.8 billion on U.S. travel and tourism-related services. For perspective, China wasn't even in the top 10 in 2008, yet could rival Mexico for 5th place next year. Talk about a growth market. Travel and tourism exports account for 29% of all U.S. services exports to China.	\$9.8 BILLION
7	 GERMANY (+9%) Three years of appreciable growth (12%, 10%, and 9% in 2011, 2012, and 2013, respectively) have enabled Germany to secure its place as America's 7th largest export market for travel and tourism. German visitors spent a record-breaking \$7.5 billion on travel to, and tourism-related activities within, the United States in 2013. Travel and tourism exports account for 27% of all U.S. services exports to Germany.	\$7.5 BILLION
8	 AUSTRALIA (+12%) As they have for four consecutive years, visitors from Australia continue to spend more than ever before in the United States—spending a record-breaking \$6.1 billion in 2013. Travel and tourism exports account for 34% of all U.S. services exports to Australia.	\$6.1 BILLION
9	 FRANCE (+11%) In 2013 travelers from France spent a much-welcomed \$5.9 billion in the United States, the third consecutive year of record-setting spending. Strong growth, however, is not the norm. Au contraire. The United States has weathered declines in travel and tourism exports to France in an unprecedented seven out of the last sixteen years. Travel and tourism exports account for 29% of all U.S. services exports to France.	\$5.9 BILLION
10	 INDIA (+14%) Once ranked 8th in terms of total spending in the United States, India maintained its position in the rankings after spending a record-setting \$5.6 billion in 2013. Since 2008 the strong emergence of both China and Brazil supplanted some of the more mature markets for U.S. travel and tourism exports, which sent India down in the rankings, too, despite its consistently strong growth. Travel and tourism exports account for 42% of all U.S. services exports to India.	\$5.6 BILLION

Source: NTOO 2013 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: 2012-2013

2013 Rank	Destination ⁽²⁾⁽³⁾ (City)	2012 Market Share	2012 Visitation (000)	2013 Market Share	2013 Visitation (000)	Volume Change (%)
1	New York City	30.6	9,107	29.9	9,579	5%
2	Miami	11.7	3,482	12.5	4,005	15%
3	Los Angeles-Long Beach	11.4	3,393	11.8	3,781	11%
4	Orlando	10.7	3,184	11.6	3,716	17%
5	San Francisco	9.4	2,798	9.5	3,044	9%
6	Las Vegas	9.1	2,708	8.9	2,851	5%
7	Honolulu	7.5	2,232	8.0	2,563	15%
8	Washington, DC	5.9	1,756	5.3	1,698	-3%
9	Chicago	4.6	1,369	4.3	1,378	1%
10	Boston	4.2	1,250	4.0	1,282	3%
11	San Diego	2.6	774	2.6	833	8%
12	Houston	2.2	655	2.5	801	22%
13	Philadelphia	2.0	595	2.1	673	13%
14	Atlanta	2.2	655	1.8	577	-12%
15	Flagstaff-G.Canyon-Sedona	1.8	536	1.7	545	2%
16	Anaheim-Santa Ana	1.6	476	1.5	481	1%
16	Seattle	1.4	417	1.5	481	15%
18	Tampa-St. Petersburg	1.4	417	1.4	449	8%
18	Dallas-Plano-Irving	1.4	417	1.4	449	8%
20	San Jose	1.4	417	1.3	416	0%
	Ft. Lauderdale	1.7	506	**	**	n/a
	Buffalo-Niagara Falls	1.0	298	**	**	n/a

¹ Excludes Canada and Mexico.

² Only 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: June 2013

Overseas⁽¹⁾ Visitors To Select U.S. States and Territories: 2012-2013

2013 Rank	Destination ⁽²⁾ (State/Territory)	2012 Market Share	2012 Visitation (000)	2013 Market Share	2013 Visitation (000)	Volume Change (%)
1	New York	31.3	9,315	30.6	9,804	5%
2	Florida	22.1	6,577	22.5	7,209	10%
3	California	20.2	6,012	20.2	6,472	8%
4	Hawaii	9.5	2,827	9.9	3,172	12%
5	Nevada	9.3	2,768	9.1	2,915	5%
6	Texas	4.5	1,339	4.9	1,570	17%
7	Guam	4.7	1,399	4.6	1,474	5%
8	Illinois	4.7	1,399	4.5	1,442	3%
9	Massachusetts	4.5	1,339	4.3	1,378	3%
10	Pennsylvania	3.2	952	3.1	993	4%
11	New Jersey	2.9	863	2.9	929	8%
12	Arizona	2.7	804	2.6	833	4%
13	Georgia	2.5	744	2.2	705	-5%
14	Washington	1.5	446	1.6	513	15%
15	Utah	1.6	476	1.5	481	1%
16	North Carolina	1.3	387	1.2	384	-1%
16	Colorado	1.5	446	1.2	384	-14%
18	Ohio	1.2	357	1.1	352	-1%
18	Virginia	1.3	387	1.1	352	-9%
18	Louisiana	1.0	298	1.1	352	18%
21	Maryland	1.0	298	1.0	320	8%
	Connecticut	0.9	268	**	**	n/a

¹Excludes Canada and Mexico.

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

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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: June 2013

Overseas Travelers Characteristics: 2013

Overseas Travelers Characteristics	All Overseas Visitors	All Leisure Visitors	All Business Visitors
Total Number of Travelers	32,038,458	21,370,000	4,934,000
Advance Trip Decision			
Average Number of Days	94.4	112.3	41.1
Median Number of Days	60.0	90.0	30.0
Advance Airline Reservation			
Average Number of Days	68.7	83.2	28.1
Median Number of Days	45.0	60.0	15.0
Means of Booking Air Trip			
Travel Agency Office	29.5%	31.2%	23.9%
Directly with Airline	29.2%	31.1%	20.2%
Internet Booking Service	26.5%	28.4%	14.0%
Corporate Travel Dept.	11.7%	4.7%	43.4%
Tour Operator/Travel Club	9.3%	11.2%	4.8%
Information Sources*			
Airlines	43.10%	43.90%	39.30%
Online Travel Agency	30.50%	34.60%	18.50%
Personal Recommendation	24.10%	28.30%	12.00%
Travel Agency Office	23.90%	25.40%	22.20%
Corporate Travel Dept.	12.80%	7.20%	40.00%
Travel Guide	12.40%	16.10%	5.30%
National/State/City Travel Office	9.60%	11.40%	5.90%
Tour Operator/Travel Club	8.50%	10.60%	4.20%
Use of Pre-Paid Package			
Yes	18.1%	23.0%	7.3%
No (Independent)	81.9%	77.0%	92.7%

*Multiple Response

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI) 2013 Overseas Visitor Profile

Overseas Travelers Characteristics	All Overseas Visitors	All Leisure Visitors	All Business Visitors
Total Number of Travelers	32,038,458	21,370,000	4,934,000
Number of States Visited*			
One State	72.2%	70.4%	69.5%
Two States	16.3%	16.3%	19.7%
Three or More States	11.5%	13.2%	10.8%
Average Number of States	1.64	1.5	1.4
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	34.80%	34.00%	44.10%
Rented Auto	33.30%	38.00%	35.00%
Air Travel between U.S. Cities	32.70%	30.90%	38.40%
City Subway/Tram/Bus	32.30%	36.10%	22.00%
Company or Private Auto	31.30%	27.90%	32.00%
Ferry/River Taxi/Short Scenic Cruise	10.20%	13.00%	4.30%
Bus between Cities	18.20%	20.60%	9.50%
Railroad between Cities	6.70%	6.70%	6.20%
Cruise/River Boat 1+ nights	4.20%	5.30%	2.00%
Air Arrivals Port-of-Entry			
New York	17.90%	19.80%	16.50%
Miami	14.60%	16.80%	11.10%
Los Angeles	10.30%	10.50%	12.90%
Honolulu	7.00%	10.20%	1.20%
Newark	5.80%	5.70%	7.20%
San Francisco	5.60%	4.60%	9.70%
Chicago	4.80%	3.00%	8.60%
Agana, Guam	4.00%	6.00%	0.40%
Orlando (excludes Sanford)	3.50%	4.80%	0.80%
Atlanta	3.40%	2.70%	3.00%
Washington Dulles	3.20%	2.20%	4.30%
Houston	2.50%	1.70%	4.80%
Boston	2.00%	1.50%	2.50%
Dallas/Ft. Worth	1.90%	1.40%	2.50%

*Multiple Response

**Maximum of 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) 2013 Overseas Visitor Profile

Overseas Travelers Characteristics	All Overseas Visitors	All Leisure Visitors	All Business Visitors
Total Number of Travelers	32,038,458	21,370,000	4,934,000
Leisure/Recreational Activities*			
Shopping	87.7%	90.7%	80.7%
Sightseeing	77.0%	83.9%	56.1%
Experience Fine Dining	38.9%	40.3%	38.7%
National Parks/Monuments	33.6%	38.4%	19.0%
Art Gallery, Museum	28.4%	30.6%	19.0%
Amusement/Theme Parks	27.8%	32.5%	13.1%
Historical Locations	26.7%	30.2%	16.3%
Small Towns/Countryside	26.7%	28.8%	17.8%
Guided Tours	23.6%	28.7%	11.8%
Concert, Play, Musical	17.7%	20.0%	9.8%
Cultural/Ethnic Heritage Sights	15.7%	17.9%	8.4%
Nightclubbing/ Dancing	15.7%	16.4%	15.9%
Sporting Event	12.7%	12.9%	9.5%
Water Sports	10.1%	12.3%	4.3%
Casinos/Gamble	9.7%	11.4%	7.1%
American Indian Communities	4.7%	5.3%	2.6%
Camping, Hiking	4.1%	4.5%	2.3%
Golf/Tennis	4.1%	4.0%	4.2%
Environmental/Ecological Excursions	3.4%	3.8%	2.2%
Snow Sports	1.9%	1.9%	1.3%
Hunting/Fishing	1.5%	1.5%	1.3%

*Multiple Response

Source: U.S. Department of Commerce, Office of Travel and Tourism Industries (OTTI) 2013 Overseas Visitor Profile

Path to 100 Million International Visitors

The National Travel and Tourism Strategy objective of reaching 100 million annual international visitors by 2021 acts as the foundation for Brand USA's long term planning and market allocation strategy. To reach the objective, US arrivals must grow 4.6% on average each year from 2014 to 2021. Current forecasts from the National Travel and Tourism Office (NTTO) predict that growth rates will not meet this pace. Unless we, collectively with our partners across the travel and tourism industry, are able materially change the trajectory of global demand, arrivals will be approximately 6 million visitors short of the goal. We have a difficult, but achievable, task ahead of us.

Economic realities

As the world's established markets wean themselves off temporary economic stimuli, stability remains fragile. IMF projections for GDP growth in advanced economies remain modest for 2014-2015. Emerging markets like China continue to maintain stronger economic momentum in comparison, but they too are beginning to decelerate. Brazil's GDP growth has already fallen to rates comparable to mature markets.

In the wake of these macroeconomic trends, there will be inherent downward pressure on growth for US arrivals, which the NTTO projects will slow from 4.7% in 2013 to 3.5% in 2014 - substantially below the 4.6% goal. While the NTTO forecasts estimates of arrivals, Brand USA's Path to 100 Million serves a different purpose - a method of projecting how we can reach our goal.

CHART 1: USA ARRIVALS - NORTH AMERICAN MARKETS

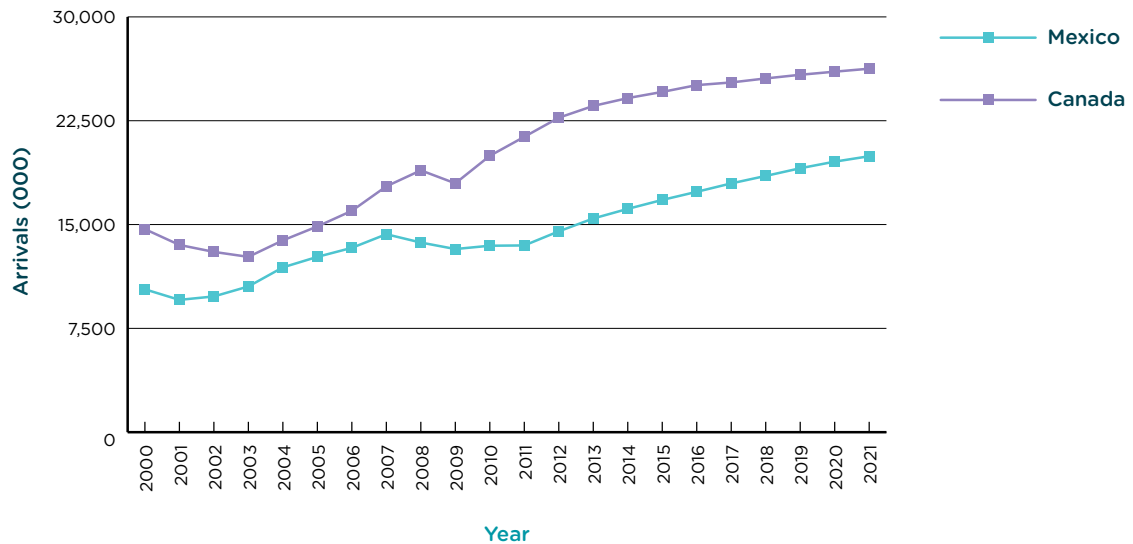
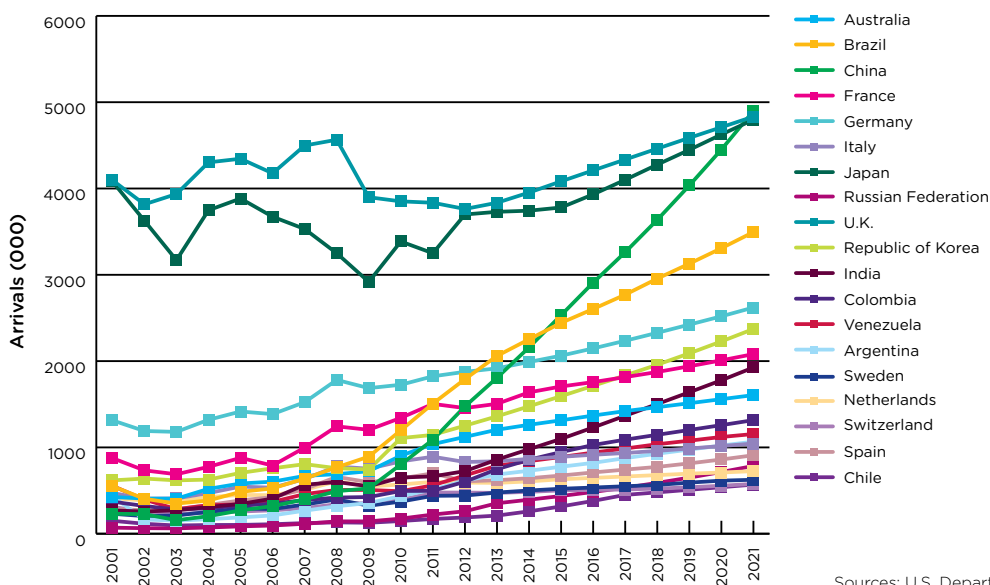


Chart 1 depicts the arrival trends for Canada and Mexico and chart 2 displays the trends for key long haul markets. Together these markets represent over 80 percent of USA visitors.

CHART 2: USA ARRIVALS OVERSEAS MARKETS



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

As the top source of international arrivals, Canada alone contributed 23 million visits in 2013 – representing a third (33.5%) of all international visitation. Considering the population of Canada is 35 million, it is clear that the US is already their “go to” destination. Therefore, growth prospects are limited as the US already has extremely high market share. Our market share of Mexican outbound travel is even higher than our Canadian share. However, as Mexico’s middle class continues to expand, the number of new travelers could potentially bolster growth into upper single digits for the next several years.

China will maintain the strongest growth trajectory among large overseas markets and is therefore a critical target market. Nevertheless, Brand USA cannot afford to underinvest in established markets like the UK that

Market share and growth potential

Growth alone does not always provide a clear picture of marketplace performance. Market share represents a key factor in determining the strength of our marketing effectiveness as well as the growth potential of a market. Mature markets where the US already maintains a high market share are limited to the pace of the entire international travel market. Markets where the US currently has lower share provide stronger

continually contribute strong volume. Bolstering growth alone is not enough – we must also continue to defend market share in an ever more competitive environment. As comparatively exotic destinations in Southeast Asia and Latin America beckon with unique cultures and affordable price points, the US must continue to invest in inspiring world travelers who already know it rather well.

Bright spots like Colombia and South Korea will also drive higher than average growth. Expectations for Japan have been lowered in the short term due to domestic tax hikes, but longer term potential remains strong. Brazil’s outlook has been softened for the next several years due to economic trends. In contrast, India’s outlook has strengthened, and likely to surpass volume from Australia by 2021.

opportunities for us to outpace overall market growth and win additional share. Brand USA monitors market share as a key performance indicator because it allows us to measure our performance independently of broader trends. Depending on the market, a 5% growth rate would be weak for China and strong for the UK. In contrast, any increase in market share is a clear indicator of strong performance.

CHART 3: USA ARRIVALS 2013 AND 2021 (PROJECTED)

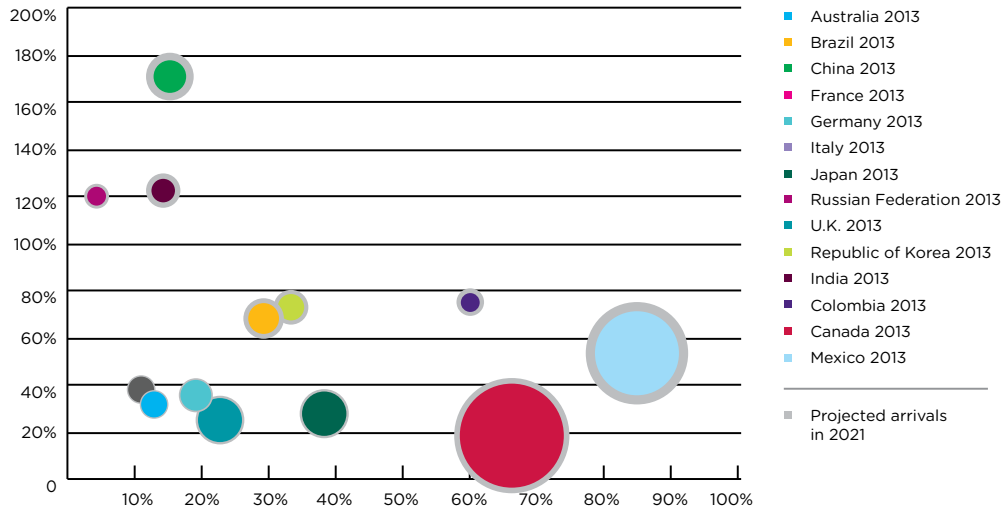


Chart 3 depicts multiple elements. The inner circles represent 2013 arrivals volume and the outer circles represent forecasted 2021 arrivals. The circles are plotted on the horizontal x axis based on the USA's 2013 market share of long haul departures (all international departures for Canada and Mexico). The vertical y axis placement represents the projected growth of 2021 compared to 2013 arrivals.

CHART 4: TOTAL INTERNATIONAL DEPARTURES 2013 AND 2021 (PROJECTED)

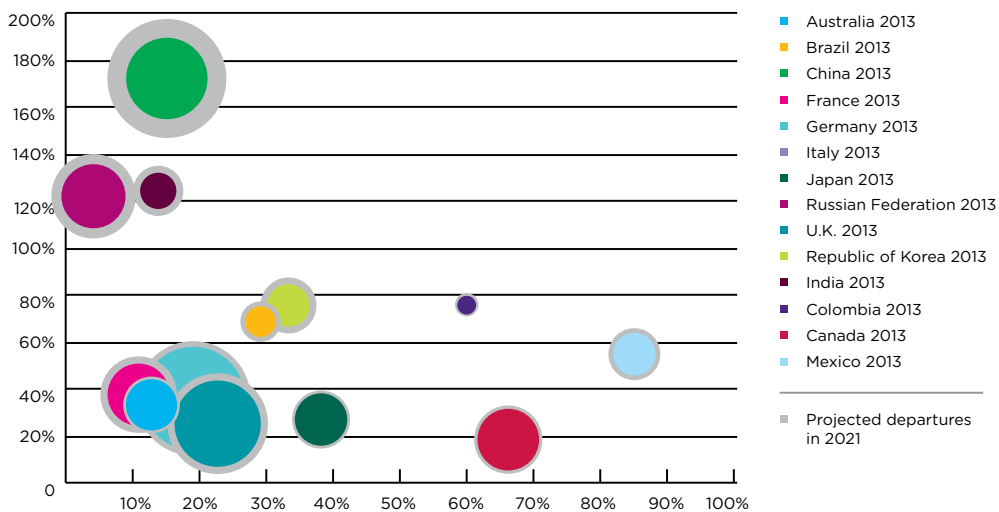
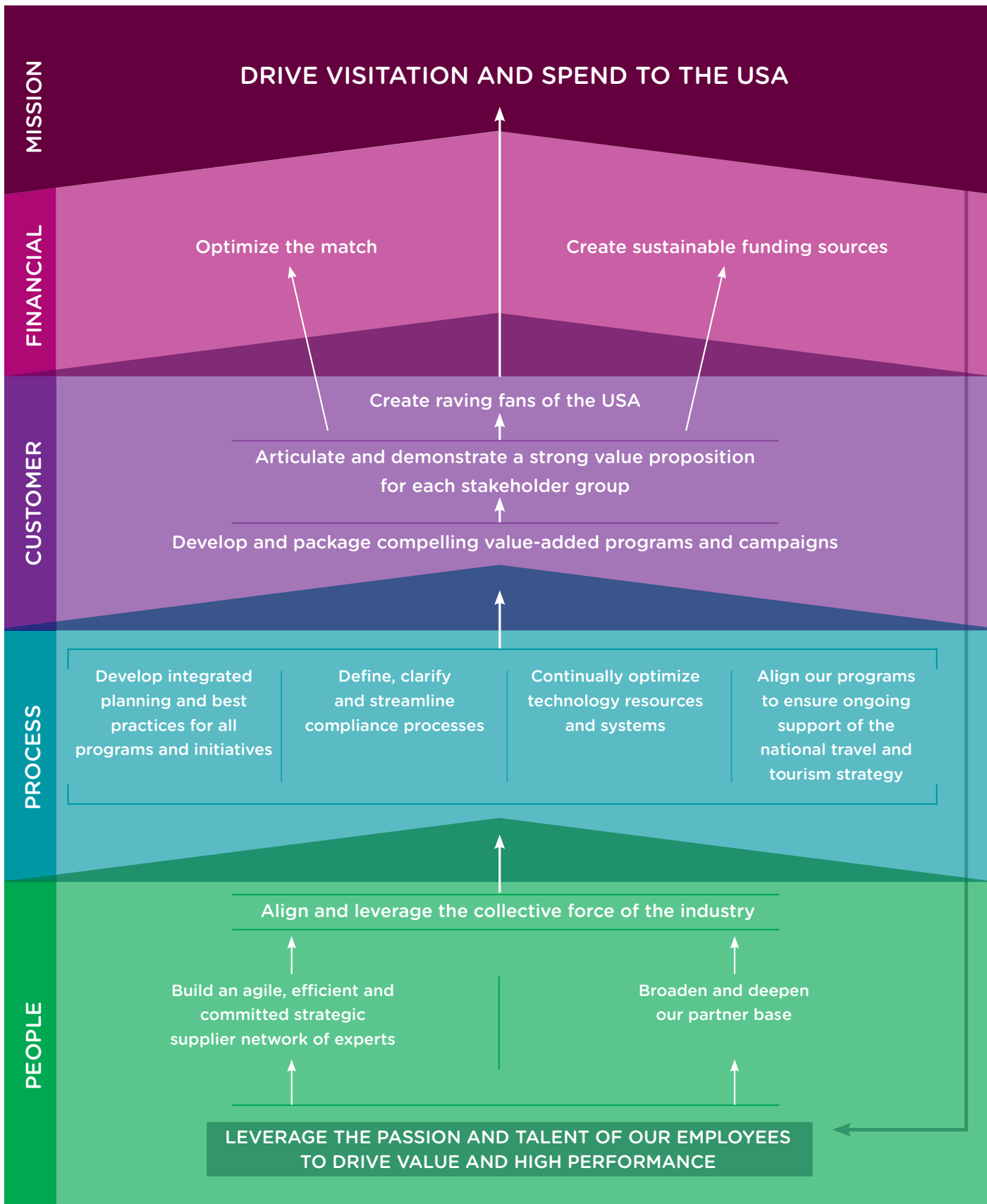


Chart 4 is arranged similarly, but the inner circles represent 2013 total international departures and the outer circles represent forecasted 2021 total foreign departures. As in Chart 3, the circles are plotted on the horizontal x axis based on the USA's 2013 market share of long haul departures (all international departures for Canada and Mexico). The vertical y axis placement represents the projected growth of 2021 compared to 2012 arrivals.

Strategy Map



Balanced Score Card (as of September 18, 2014)

	OBJECTIVES	GOALS		STATUS
MISSION	Drive visitation and spend to the USA	<ul style="list-style-type: none"> Attributable increase in visitation and spend 	On Target	The ROI study released in February 2014 shows that Brand USA is working---efficiently and effectively: Driving incremental visitation of 1.1 million international travelers to the USA who spent \$3.4 billion in direct spend and \$7.4 billion in direct, indirect, and induced spend. The next ROI study (which will include 10 markets where Brand USA fully deployed its consumer, cop-op and trade outreach in FY14) are being tracked on a rolling basis and will be reported in February 2015.
FINANCIAL	Maximize the Match	<ul style="list-style-type: none"> Percentage increase in eligible matching funds received 	On Target	Brand USA more than doubled its contributions from FY12 to FY13 (from \$60 million to nearly \$130 million)—realizing 100% of the eligible matching funds from the Travel Promotion Fund. As of September 5, 2014, Brand USA forecasts that it will reach 100% of the match for FY14, including \$50 million in cash and \$75 million in in-kind.
	Create sustainable funding sources	<ul style="list-style-type: none"> Percentage increase in the number of cash and in-kind partners 	Above Target for Cash	The number of cash (LOA) partners increased 210% from 39 to 82 (FY12 to FY13); total number of partners increased 380% from a core 89 to 339 (FY12 to FY13). YTD September 12, 2014, 258 partners have contributed cash and/or in-kind (a 31% decrease compared to the 339 partners we had for the full year FY13). This total includes 149 cash contributors (a 75% increase from 85 cash partners in FY13) and 109 in-kind contributors (a 225% decrease from the 245 in-kind partners in FY13). Of these partners, 79 are first-time LOA partners and 57 are first-time in-kind contributors.
		<ul style="list-style-type: none"> Percentage increase in cash contributions 	Exceeding Goal	As of September 12, 2014, cash contributions are forecast to be \$40 million. This represents a 15% increase in cash contributions compared to the \$35 million in cash contributions received for the full year FY13. Cash contributions are expected to exceed budget by \$8 million (or 25%) for the year.
CUSTOMER	Develop and package compelling value-added programs and campaigns	<ul style="list-style-type: none"> Percentage increase in co-op program participation 	Exceeding Goal	YTD September 12, 2014, 140 partners are participating in Brand USA co-op programs for a total of \$11.4 million in co-op related contributions. This represents a 169% and 34% increase, respectively, from the 52 partners who participated in co-op programs for a total of \$8.5 million in FY13.
		<ul style="list-style-type: none"> Partner retention rate 	On Target	We currently have a 94% partner program retention rate. The increase has been driven by an expanding number of Brand USA co-op programs (particularly Brand USA "originals").
	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) 	Benchmark Year	Partner survey planned for execution upon close of FY14. Results will be reported during the first quarter of FY15.
	Create raving fans of the USA	<ul style="list-style-type: none"> Consumer Net Promoter Score 	Benchmark Year	Across target markets (AU, BR, CA, CN, FR, DE, IN, JP, KR, MX, RU, UK) the percentage of net promoters is 46%, a 1 percentage point increase compared to 2013. Net promoters are defined as those who selected "I would bring [the USA] up to recommend as a destination" in a quantitative survey conducted by PhoCusWright.
<ul style="list-style-type: none"> Social Sentiment Index 		Benchmark Year	Social sentiment remains positive at 89% across all of Brand USA's digital channels based on informal monitoring. Visible was selected in the RFP process for an advanced social monitoring tool and is currently being configured. Results will be available upon close of FY14.	

	OBJECTIVES	GOALS		STATUS
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 	Benchmark Year	In planning stages to apply for DMAP certification during FY15.
	Define, clarify, and streamline compliance processes	<ul style="list-style-type: none"> • Percentage compliance to policies and procedures 	On Target	YTD September 12, 2014, Brand USA, through its numerous review activities has achieved 100 percent compliance with its policies and procedures with 9% of invoices being returned for additional documentation or signatures required prior to payment (vs 3% YTD 4/30/14).
		<ul style="list-style-type: none"> • Average number of ESTA filing days (cycle time) (from contribution to receipt of funds) 	Benchmark Year	YTD September 10, 2014, the average number of filing days for all ESTAs is 97 (compared to 89 YTD 6/1/14 and 101 days YTD 3/19/14). The average number of ESTA filing days is 86 days for CASH contributions (compared to 57 days YTD 6/1/14) and 110 days for IN-KIND contributions (compared to 94 days YTD 6/1/14 and 149 days YTD 3/19/14).
		<ul style="list-style-type: none"> • Average time to process / pay invoices 	Benchmark Year	YTD September 12, 2014, average time to process and pay invoices is 10 days for invoices valued less than \$100,000 (vs 4 days YTD 5/30/14) and 22 days for invoices above \$100,000 (vs 30 days YTD 5/30/14). Employee expense reports are processed and paid in 6 days (vs 8 days YTD 5/30/14 and YTD 3/19/14).
	Align our programs to ensure ongoing support of the National Travel and Tourism Strategy	<ul style="list-style-type: none"> • Percentage achievement of the Tourism Policy Council shared annual objectives 	On Target	We have a robust plan with the Tourism Policy Council with several action steps across nine Federal agencies, with 100% of objectives on track and on schedule.
Continually optimize technology resources and systems	<ul style="list-style-type: none"> • Percentage of planned technology resources implemented on time and within budget 	On Target	YTD September 12, 2014, 100% of technology resources have been implemented on time and within budget.	

Balanced Score Card

	OBJECTIVES	GOALS		STATUS
PEOPLE	Align and leverage the collective force of the industry	<ul style="list-style-type: none"> Reauthorization* 	In process	Reauthorization has passed in the House and is under consideration in the Senate.
	Build an agile, efficient and committed strategic supplier network of experts	<ul style="list-style-type: none"> Percentage of suppliers Brand USA Certified 	In Process	The Brand USA Supplier Certification program is under development and is scheduled to be fully implemented October 1, 2014 (from its original schedule of June 1, 2014).
		<ul style="list-style-type: none"> Percentage of suppliers meeting or exceeding annual performance goals 	Scheduled	This metric is scheduled to be tracked and reported once the Brand USA Supplier Certification program is fully implemented in October 2014.
	Broaden and deepen our partner base	<ul style="list-style-type: none"> Number of sponsors/partners outside the travel industry 	On Target	Brand USA has increased the number of partnerships outside the direct travel industry. Currently 5 partners, or 2%, are in the sports/entertainment segment (compared to 7 in FY13). 12 partners, or 4.6%, are in retail (compared to 5 partners in FY13).
		<ul style="list-style-type: none"> Percentage share of potential LOA partners 	Exceeding Goal	We have signed 100% of the 50 LOA partners we targeted for FY14 plus an additional 5 for a total of 55 as of September 12, 2014.
		<ul style="list-style-type: none"> Percentage increase in per-partner contribution 	On Target	Based on total contributions (cash and in-kind), per partner contributions YTD are \$440,310 per partner (based on 258 partners contributing a total of \$114 million cash and in-kind). This represents a 13% increase in per partner contributions over FY13 when contributions per partner were \$389,381 (based on 339 partners contributing a total of \$132 million cash and in-kind). Cash contributions per partner are \$244,966 (based on \$36.5 million in cash contributions received from 149 partners YTD. This represents a 55% decrease compared to \$380,316 cash contributions per partner (based on \$32.3 million in cash contributions received from 85 partners in FY13).
	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 	On Target	The Brand USA employee certification process "Roadmap to Success" is under development. 100% of employees have completed the components of the certification process currently available.
		<ul style="list-style-type: none"> Percentage of employees meeting or exceeding annual performance goals 	On Target	The Brand USA Performance Management process was put in place in February 2014. 100% of employees have developed their FY14 performance goals and mid-year performance reviews have been completed, with 100% of employees on target to achieve their annual goals.

Highlights of FY13 Activities & Successes

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

Highlights over the past year include:

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

FY15 Objectives

Objective #1

Continue to drive positive awareness and perceptions of the United States as a travel destination in order to increase international visitation, spend and global market share for the United States.

- Support all 50 states, the District of Columbia and the five territories with a mix of trade and consumer focused initiatives
- Time, target and execute consumer and trade outreach during peak travel planning periods to optimize marketing effectiveness and efficiency
- Encourage return visits by previous travelers who are already holding multi-year validity visas

Objective #2

Focus FY15 campaign activity on the following objectives:

- Protect or improve the image and perceptions of the United States as a destination as measured by independently conducted post-wave campaign research
- Protect or increase intent to travel to the United States as measured by independently conducted post-wave campaign research

Objective #3

Activate consumer marketing in international markets that generate 81% of inbound travel to the United States.

Consumer Brand Campaign Schedule October 2014 through September 2015

By Market	
Australia	January - February 2015
Brazil	March 2015 August - September 2015
Canada	March - April 2015
Chile	March 2015
China	June - October 2014 April - May 2015
France	January - February 2015
Germany	February - March 2015
India	January - February 2015
Japan	September - October 2014 May - June 2015
South Korea	May - June 2015
Mexico	May - June 2015 August - September 2015
Taiwan	April - May 2015
U.K.	January - February 2015

By Date	
August - October 2014	China
September - October 2014	Japan
January - February 2015	Australia, United Kingdom, India, France
February - March 2015	Germany
March 2015	Brazil, Chile
March - April 2015	Canada
April - May 2015	China, Taiwan
May - June 2015	Mexico, South Korea, Japan
August - September 2015	Brazil, Mexico
September - October 2015	Japan

NOTE: Schedule and media mix subject to change to optimize media and market opportunities. Designated markets generated 56.6 million of the 69.8 million international arrivals (81%), and \$121.5 billion of the \$180.7 billion in international visitor spending (67%), in 2013 (Source: NTTO)

Objective #4

Execute against the Brand USA metrics plan to measure performance of all marketing activities, including:

MARKET INTELLIGENCE

- Traveler behaviors, preferences, and perceptions (Measurement Methodology: Online survey in each target market)
- Market share of outbound tourism from target markets (total and by channel) (Measurement Methodology: Actuals as reported by global organizations and reservations distribution systems)
- Competitor advertising monitoring

CREATIVE AND PRODUCT TESTING

- Traveler reaction to advertising and promotional products (Measurement Methodology: Online survey in each target market)

MARKETING MIX OPTIMIZATION

- Geographic distribution of advertising units and cost (Measurement Methodology: Actual values)
- Media channel distribution of advertising units and cost (Measurement Methodology: Actual values)

AWARENESS

- Total brand media impressions (Measurement Methodology: Actual values)
- Consumer destination familiarity (Measurement Methodology: Online survey in each target market)

ENGAGEMENT

- Clicks on digital ads (Measurement Methodology: Actual values)
- Website visitation (Measurement Methodology: Actual values)
- Sentiment (Measurement Methodology: Actual values)

CONSIDERATION/ACTION

- Search volume (Measurement Methodology: Actual values from multiple partner sources)
- Consumer intent to visit (Measurement Methodology: Online survey in each target market)

PURCHASE (VISITATION, SPEND, MARKET SHARE, ECONOMIC IMPACT)

- Total inbound visitation and spend by source market (Measurement Methodology: I-94 data and paper survey of international air travelers reported by NTTO)
- Attributable increase in visitation and spend (Measurement Methodology: Delta between forecast visitation and spend based on historic performance, including confounding variables and actuals reported by NTTO)
- Attributable increase in market share (Measurement Methodology: Calculation based on attributable increase in visitation and global arrivals data from Oxford Economics)
- Attributable increase in economic impact (Measurement Methodology: Calculation based on attributable visitation and spend metrics)

SHARING

- Consumer net promoter score (Measurement Methodology: Online survey in each target market)
- Consumer sentiment index (Measurement Methodology: Volume and semantic analysis of consumer generated content on social networks and travel websites)

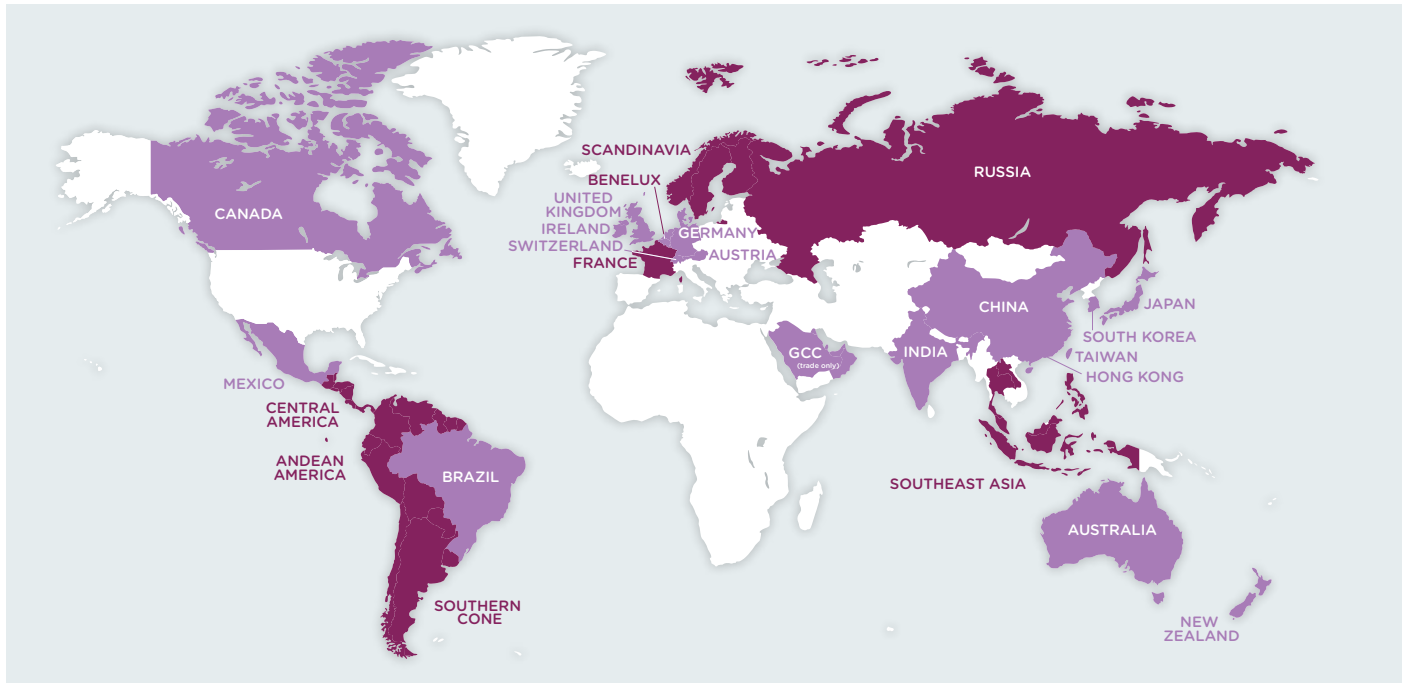
Objective #5

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

- Continue to develop, expand, and implement a range of partnership programs that provide relevant co-operative, publisher, research, and other opportunities for destinations and travel brands
- Continue the development of unique content that promotes travel to the United States and can be repurposed by destinations and travel brands
- Continue the integration of consumer and trade outreach to maximize the opportunities that exist during peak travel planning periods
- Collaborate with the Tourism Policy Council Marketing and Promotion Working Group to develop and conduct joint activities and leverage Federal assets to support Brand USA marketing efforts
- Collaborate with the Tourism Policy Council Ease of Travel Working Group to communicate visa, entry, and other policy information provided by the TPC through multiple channels, including DiscoverAmerica.com, social media, the USA inspiration guide, in-market representation and communications, and other trade and consumer events

Objective #6

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



Current International / Trade Representation (as of 09/30/14)¹

Australia	Germany	Mexico	Taiwan
Austria	Guatemala	New Zealand	United Kingdom
Brazil	Hong Kong	Nicaragua	Gulf Coast Countries (GCC) ²
Canada	India	Panama	
China	Ireland	South Korea	
Costa Rica	Japan	Switzerland	

Expansion Markets

Benelux	Middle East (GCC)
France	Latin America
Russia	• Andean Region
Scandinavia	• Southern Cone
Southeast Asia ³	

[1] As of September 30, 2014, Brand USA has 12 international representation offices covering 20 markets. Three offices support multiple markets as follows:

- Australia & New Zealand (based in Australia)
- Austria, Germany, & Switzerland (based in Germany)
- Costa Rica, Guatemala, Mexico, Nicaragua, & Panama (based in Mexico)

[2] Brand USA currently has a trade representative for the Gulf Coast Countries (GCC) and plans to establish an international representation office to support this market during FY15; GCC includes Bahrain, Kuwait, Oman, Saudi Arabia, and United Arab Emirates

[3] Singapore, Malaysia, Indonesia, Thailand, The Philippines

Objective #7

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

- Increase the number of Brand USA pavilions 24 in FY14 to 29 in FY15
- Further enhance USA Pavilion presence at each show through continuity and quality in content, collateral and exhibitor orientation/education
- Continue to expand the USA Discovery online platform launched in the UK and Ireland in June 2013 as a worldwide travel trade online USA destination-training program
- Continue to host MegaFams, including those originating from the UK, Germany, Australia, and Mexico
- Host sales missions and/or roadshows in each market where Brand USA has established international representation

Tradeshow Schedule October 2014 through September 2015

Tradeshow	Location	Event Dates	Consumer (C) Trade (T)	Number of Visitors
TTG Incontri	Rimini, Italy	October 9-11, 2014	T	T: 50,685 (2012)
FIT	Buenos Aires, Argentina	October 25-28, 2014	T&C	T+C: 92,233 (2012)
International Golf Travel Market	Como, Italy	October 27-30, 2014	T	T: 1,300 (2012)
ITB Asia	Singapore	October 29-31, 2014	T	T: 8,500 (2012)
WTM London	London, England	November 3-6, 2014	T	T: 47,425 (2012)
Taipei ITF	Taipei, Taiwan	November 7-10, 2014	T&C	T+C: 262,590 (2012)
CITM	Shanghai, China	November 14-16, 2014	T&C	T+C: 100,000+ (2012)
EIBTM	Barcelona, Spain	November 18-20, 2014	T	T: 15,200 (2012)
Vakantiebeurs	Utrecht, The Netherlands	January 14-18, 2015	C	C: 103,856 (2013)
FITUR	Madrid, Spain	January 28-31, 2015	T&C	T: 64,473 + C: 91,082 = 155,555 (2013)
SATTE	New Delhi, India	January 29-31, 2015	T	T: 7,419 (2013)

(continued from page 33)

Tradeshow	Location	Event Dates	Consumer (C) Trade (T)	Number of Visitors
BIT	Milan, Italy	February 12-14, 2015	T&C	T: 60,000 + C: 30,000 = 90,000 (2013)
AIME	Melbourne, Australia	February 24-25, 2015	T	T: 3,024 (2014)
ITB Berlin	Berlin, Germany	March 4-8, 2015	T&C	T: 110,000 + C: 60,000 = 170,000
MITT	Moscow, Russia	March 18-21, 2015	T&C	T: 54,586 + C: 19,179 = 73,765 (2013)
WTM Latin America	São Paulo, Brazil	April 22-24, 2015	T	T: 8,000+ (2013)
ATM	Dubai, United Arab Emirates	May 4-7, 2015	T	T: 17,575 (2012)
IMEX	Frankfurt, Germany	May 19-21, 2015	T	T: 8,782 (2012)
HITS	Seoul, South Korea	May 23-25, 2015	T&C	T+C: 71,000 (2012)
NEXT	Mexico City, Mexico	May 27-28, 2015	T	T: (new event)
IPW	Orlando, Florida, USA	May 30-June 3, 2015	T	T: 5,000
Virtuoso Travel Week	TBA	August 2015	T	T: 4,100
La Cita	Miami, Florida	September 2015	T	T: 300
CIBTM	Beijing, China	September 2015	T	T: 3,692 (2013)
FITA	Mexico City, Mexico	September 2015	T&C	T+C: 60,000 (2012)
IFTM Top Resa	Paris, France	September 2015	T	T: 28,788 (2012)
ABAV	São Paulo, Brazil	September 2015	T&C	T: 28,000 (2012)
JATA	Tokyo, Japan	September 2015	T&C	T: 49,485 + C: 76,504 = 125,989 (2012)
World Routes	KwaZulu-Natal Province, South Africa	September 2015	T	T: 3,000

NOTE: Schedule also posted on <http://www.thebrandusa.com/Events/Tradeshows>

Objective #8

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

- Continue to maintain a comprehensive partnership guide detailing program opportunities—working in collaboration with our partners to continually develop and offer programs that help them maximize and achieve their business objectives
- Meet with the Tourism Policy Council and the TPC Working Groups for Marketing and Promotion, Ease of Travel, and Research regularly as needed. Brief the TPC principals at least once per year, or as deemed appropriate by the Department of Commerce and other TPC agencies
- Track progress of programs and results against pre-determined metrics (to be established with the Federal agencies) to measure success of entry-policy communication and other joint promotional efforts—leveraging a combination of KPIs currently tracked by the Federal agencies and Brand USA
- Provide quarterly updates on campaign progress and other initiatives to government and industry stakeholders
- Develop and launch national media site and distribution for destinations
- Create and update a series of toolkits to launch in advance of key events and initiatives to support partners
- Provide monthly updates to the industry via eNewsletter series to include an umbrella newsletter augmented with communications customized for industry, partners, stakeholders, media, and supplier partners
- Produce the organization’s annual report for Department of Commerce transmittal to Congress by May 15 as required by the Travel Promotion Act
- Maintain directionally positive sentiment across social channels of 80% average or higher as measured on a quarterly basis
- Increase active fan community by 15% on a year-over-year basis through targeted promotions, advertising, and relevant content
- Maintain active participation in key government and industry conferences

Objective #9

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

- Meet with the Tourism Policy Council and the TPC Working Groups for Marketing and Promotion, Ease of Travel, and Research regularly as needed. Brief the TPC principals at least once per year, or as deemed appropriate by the Department of Commerce and other TPC agencies to integration with the National Travel and Tourism Strategy
- Collaborate with the Tourism Policy Council Ease of Travel Working Group to communicate visa, entry, and other policy information provided by the TPC through multiple channels, including DiscoverAmerica.com, social media, the USA inspiration guide, in-market representation and communications, and other trade and consumer events
- Collaborate with the Department of Homeland Security to promote and expand trusted traveler programs, such as Global Entry
- Work with the Department of Homeland Security/ Customs and Border Protection and airport authorities to understand and improve the customer experience at our ports of entry, as well as points of departure in the U.S. incorporating the more broad experience to include arrivals and transfers experience at TSA checkpoints. This effort will include but not be limited to the creation of video and OOH collateral for international arrival halls.
- Collaborate with the Tourism Policy Council Marketing and Promotion Working Group to develop and conduct joint activities and leverage Federal assets for Brand USA's campaign
- Collaborate with the U.S. missions abroad to develop new collateral and enhance existing communications materials that can be distributed and displayed at embassies, consulates, key information centers, digital properties, meetings, and high-profile events
- Equip in-market reps with resources to support their collaboration with embassies on the above programs
- Collaborate with the State Department and the Foreign Commercial Service on in-market communications, social media, and embassy events
- Determine with the Tourism Policy Council, and particularly the Research Working Group, the key metrics to track to determine success of entry policy communication and other joint promotional efforts—using a combination of KPIs currently used by the Federal Agencies and Brand USA

Objective #10

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

Target 50% from cash contributions and 50% from in-kind contributions, but no less than 25% cash and no more than 75% in-kind

Goals

- Generate incremental visitation of 1.3 million and incremental spend of \$4 billion (results to be reported in March 2016)
- Support the United States' increase in global market share from 13.2% to 13.4%
- Raise \$47 million in cash and \$70 million in in-kind
- Maintain a 94% partner program retention rate
- Maintain 100% compliance with policies and procedures
- Keep administrative costs to 10% or lower



FY15 Strategies

Build Dynamic Content:

Engage and inspire travelers through storytelling that emphasizes experience (great outdoors & culinary primarily plus niche: retail, ski/golf, cruising, road trips, attractions, hotels).

Expand Market Presence:

Build and expand the USA's marketing efforts in the right markets at the right time.

Leverage Industry Collaboration:

Harness the collective force of our partners to drive demand.

Create Value:

Create strong calls to action through co-op marketing, trade outreach, and public relations.

Market the Welcome:

Work with our federal agency partners to maximize and communicate ease of entry processes, programs, and progress.

Drive Results:

Make market-driven decisions and track results based on sound research and analytics.
Operate efficiently and effectively.

FY15 Initiatives

BUILD DYNAMIC CONTENT

Engage and inspire travelers through storytelling that emphasizes experience (great outdoors and culinary, primarily, plus niche: retail, ski/golf, road trips, attractions, cruising, hotels)

Through this strategy, Brand USA aims to be the USA's primary storyteller and inspirer to international travelers to visit our gateways and beyond. By building, aggregating, and distributing dynamic content through our many proprietary and third-party channels, Brand USA will promote the nearly endless diverse and exciting destinations and experiences our nation offers travelers.

Core Messaging

Throughout FY15, we will utilize the four experience pillars of the Great Outdoors, Urban Excitement, Indulgence, and Culture as the foundation of our messaging.



The majority of our programs and initiatives during FY15 will focus on the Great Outdoors and Urban Excitement with an Indulgence influence to streamline messaging and generate international visitor interest, engagement and activation.

Marquee Programs

Showcasing the National Parks on Giant Screens Worldwide



Through its partnership with MacGillivray Freeman Films, Brand USA is producing a film for giant screen theaters that promotes the USA as a top travel destination by showcasing the country’s great outdoors as a method for bringing travelers beyond the gateways.

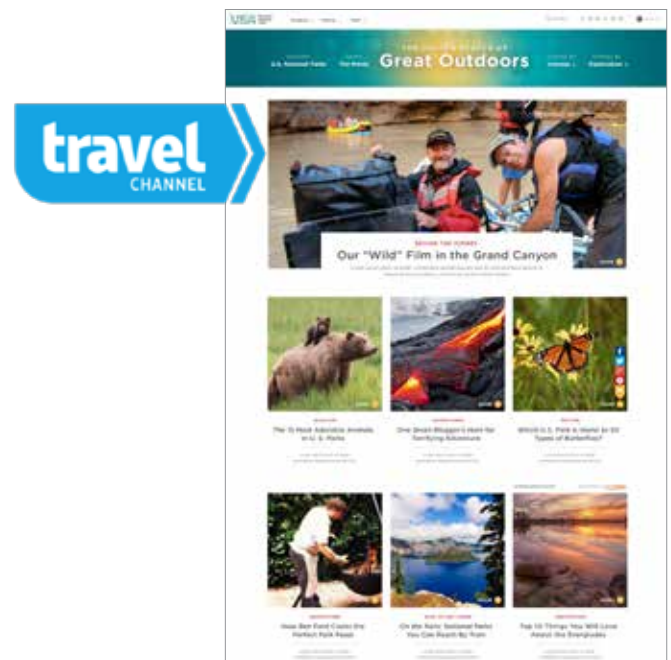
With a planned release in mid-2015 to honor the centennial anniversary of the National Park Service, the film will focus on one of the nation’s most treasured assets—the natural beauty and tourism attractions of U.S. National Parks and Federally managed lands.

The giant-screen film will capture the myriad of experiences available through the nation’s great outdoors, therefore inspiring visitors to discover the beauty and diversity across the United States.

MacGillivray Freeman has been the leading independent producer of films for IMAX® and other giant screen theatres for over 30 years. They have produced five of the top 10 highest grossing giant-screen films of all time, including the first to gross more than \$150 million with the production of the blockbuster hit “Everest.”

The size and immersive nature of the IMAX and giant screen platforms is the perfect canvas to showcase the beauty and wonder of the national parks. With more than 800 giant screen theatres in over 57 countries and growing, giant screen theatres can be found in many of Brand USA’s key target markets. Notably, China, one of the United States’ top 10 countries in both international visitation and spend, has the second largest market with over 75 giant screen theatres located throughout the country.

During production of the film throughout FY15, Brand USA will powerfully promote the development and release of the movie, as well as provide compelling glimpses into the scenic byways and state and district parks, through multi-channel consumer and trade advertising, public relations activities, a 10-part television series with the Travel Channel, and by creating a world-class content strategy.



The content strategy will serve as the hub for all communications and promotions—enabling Brand USA and its partners to reach and engage travelers with stories about the National Parks and the wider aspects of the Great Outdoors to build demand and create activation points for travelers to plan their next trip to the USA.

Supports Objectives:

#1, #3, #5

Goals:

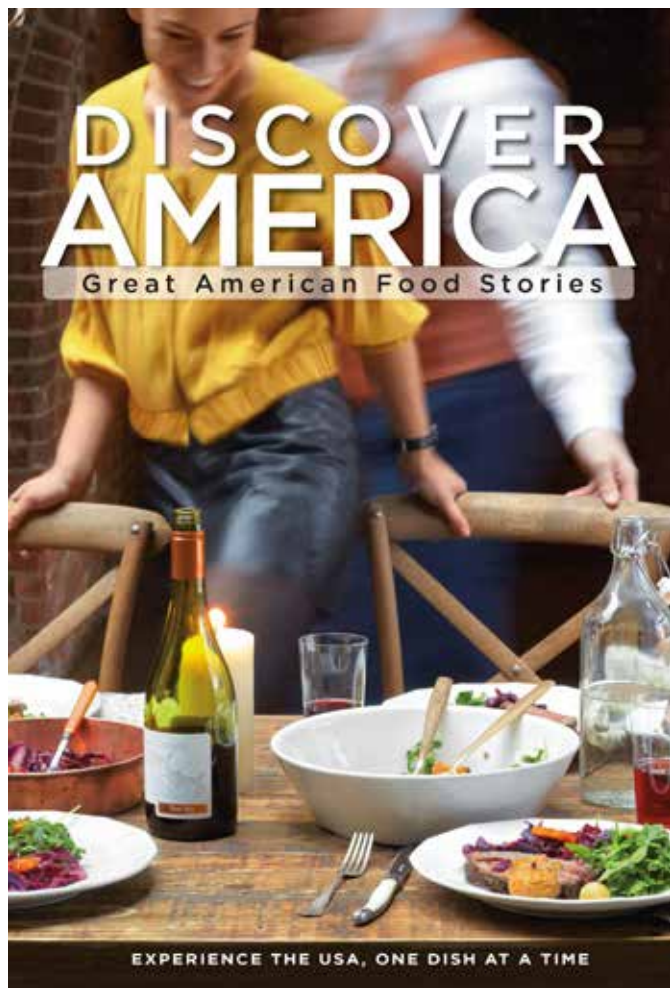
Currently, international travelers account for approximately 20% of all visitation to the National Parks. Through promotion of the film and its release in FY15, Brand USA aims to increase international visitation to the National Parks 15%.

Increasing the World's Appetite for Travel to the USA with Great American Food Stories

Another key theme for FY15 is the combination of Urban Excitement and Indulgence—with culinary as a primary catalyst.

Through our advertising, consumer and trade outreach, public relations activities, programs and platforms during FY15, we will highlight the various culinary experiences and cultures of US destination and regions, along with other experiential attraction based activities (such as shopping, concerts, festivals, spectator sports, etc.).

In many markets, culinary has risen to one of the top five motivations travelers select an international destination. In fact, culinary is a top motivator in seven of the 12 markets Brand USA conducted proprietary research in 2014, including Australia, Brazil, Canada, China, Germany, Japan, and Mexico. (Source: Brand USA 2014 proprietary market profiles research).



This year's focus on culinary is a follow up to the successful launch of the pilot public diplomacy culinary tourism campaign conducted in collaboration with the Tourism Policy Council in five target markets in East Asia (China, Taiwan, Australia, Japan and South Korea) to promote U.S. tourism and agricultural exports around embassies' July 4 festivities.

Promoted through an integrated recipe book with articles and photos highlighting U.S. tourism destinations, public relations activities, events, American chef visits, and digital marketing, the initiative highlighted the vibrant and diverse culinary landscape across the United States.

During FY15, we will expand the promotion of culinary experiences to international travelers around the theme of Great American Food Stories. The effort will be supported by:

- A culinary guide featuring the varied, vibrant, and delicious dishes that define the range of culinary landscapes across the United States
- A social content hub and digital marketing campaign in target markets beginning with an initial roll out in Canada, Japan, and the United Kingdom
- A series of 2-minute video vignettes featuring 30 Chefs, 30 Days airing 10 times a day on the Food Network in July 2015 in South America, the United Kingdom, and the EMEA region (Europe, Middle East, and Africa)
- Expanded episodes and food journeys showcasing regional USA cuisine on the Travel Channel as seen through the eyes of British broadcast personalities and food experts Jeni Barnett and Olly Smith.
- Related complementary content on all DiscoverAmerica.com language sites

Supports Objectives:

#1, #3, #5

Goals:

Measurable increases in awareness, engagement, consideration/action, and sharing (net promoter score and sentiment)

Capturing the World's Attention at the World's Largest Global Consumer Show



From May to October 2015, one of the most exciting world's fairs will be held in Milan, Italy. Drawing some 25 to 30 million visitors from around the world, World's Expo ("the World's Fair") occurs every five years and the world's largest global consumer show.

The United States will be one of the 140-plus countries participating in the Expo Milano 2015, which is themed "Feeding the Planet, Energy for Life." During the six-month event, the United States will present a dynamic pavilion with the complementary theme "American Food 2.0: United to Feed the Planet."

Brand USA will leverage the USA pavilion to deploy its culinary co-op platform and its great outdoors platform, as well as promote and premier the giant screen film celebrating the National Parks.

As the exclusive sponsor of six food trucks, pavilion branding, and access to James Beard Foundation

chefs and event space, Brand USA will offer a variety of programmatic opportunities for its partners to gain exposure at World Expo and engage the Brand USA culinary platform.

The USA Pavilion at World Expo Milano will support the collaboration between Brand USA and the Tourism Policy Council to develop thematic tourism diplomacy campaigns as noted in the May 2014 Presidential Memorandum to improve the entry process and welcome more international travelers to the United States. Of the many actions called for in the Memorandum, three were related to coordinated efforts with Brand USA, including working with Brand USA to develop thematic tourism diplomacy campaigns.

Supports Objectives:

#5, #7

Goals:

- Generate 10 million global travelers and millions more virtual visitors through the USA pavilion
- Engage 8 destinations or travel brands as partners in Food Truck Nation

DISCOVER AMERICA with Peter Greenberg

DISCOVER AMERICA with Peter Greenberg (Discover America) is a groundbreaking special documentary series and a unique tour that celebrates the best that our great nation has to offer.

The show is produced and hosted by Peter Greenberg, a multi-Emmy Award-winning producer and the Travel Editor for CBS News. Discover America is modeled after Greenberg's historic and unprecedented Royal Tour series for public television, where Presidents, Prime Ministers and Kings serve as his personal tour guides to their countries, ranging from the King of Jordan and President of Mexico, to the Prime Minister of New Zealand and most recently Prime Minister Netanyahu of Israel. You can view the promotional video for the Royal Tour at this link.

In Discover America, Greenberg will be guided by America's own set of royalty—our beloved stars of film, television, music and sports. These special co-hosts will give Peter the “royal tour” of their favorite places, journeys and experiences within the states where they were born, raised or live.

Discover America is funded by Brand USA; the public-private partnership established by an act of Congress and tasked with promoting inbound (international visitor) Travel and Tourism to the United States. Travel and tourism is a critical factor in driving the U.S. economy, and is especially important to the health of our smaller towns and cities. Since its launch in 2011, BUSA has been enormously effective in increasing inbound tourism to pre-9/11 levels. They've achieved this through education and powerful and creative marketing campaigns overseas. The Discover America television series is considered a major phase of high profile outreach to the international traveler community.

Discover America will be distributed via Brand USA's overseas media partners. The initial season is comprised of five to ten, 30-minute episodes, each devoted to a single state.



From the natural beauty of the Grand Canyon in Arizona and the Mammoth Caves of Kentucky to the world-renowned music scene in Austin, Texas; through small historic towns across the country as well as many of the lesser-known hidden gem destinations throughout the U.S., Discover America, is more than a traditional travelogue; it is an up-close, personal journey to and inside the towns and cities that hold special significance to our celebrity guides –through their eyes. It gives them an opportunity to give back to communities that have helped to shape their own lives by encouraging travelers around the world to come and see for themselves how truly special these places are.

Most importantly, the Discover America series offers a fantastic and proven platform to help boost our country's economy in direct and tangible ways while credibly promoting a better understanding of America's unique and varied landscape, culture and spirit—and people.

Supports Objectives:

#1, #5

Goals:

Measurable increases in awareness, engagement, consideration/action, and sharing (net promoter score and sentiment)

EXPAND MARKET PRESENCE

Build and expand the USA’s marketing efforts in the right markets at the right time

The Path to 100 Million International Visitors

A driving force for our marketing efforts is the achieve the goal established in the National Travel and Tourism Strategy to welcome 100 million international visitors to the United States in a single year by 2021. The goal is a challenging one. The Department of Commerce’s National Travel and Tourism Office (NTTO) currently forecasts compound annual growth rate in international arrivals of 3.7% from 2014 to 2018, while the required

growth rate to achieve the goal of the National Travel and Tourism Strategy is 4.6%.

In order to accelerate growth in international arrivals, Brand USA must concentrate its marketing efforts in the right markets (those with the strongest indicators of growth) at the right time (when travelers are most motivated to plan and activate travel).

Market Selection

During FY15, Brand USA will target a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

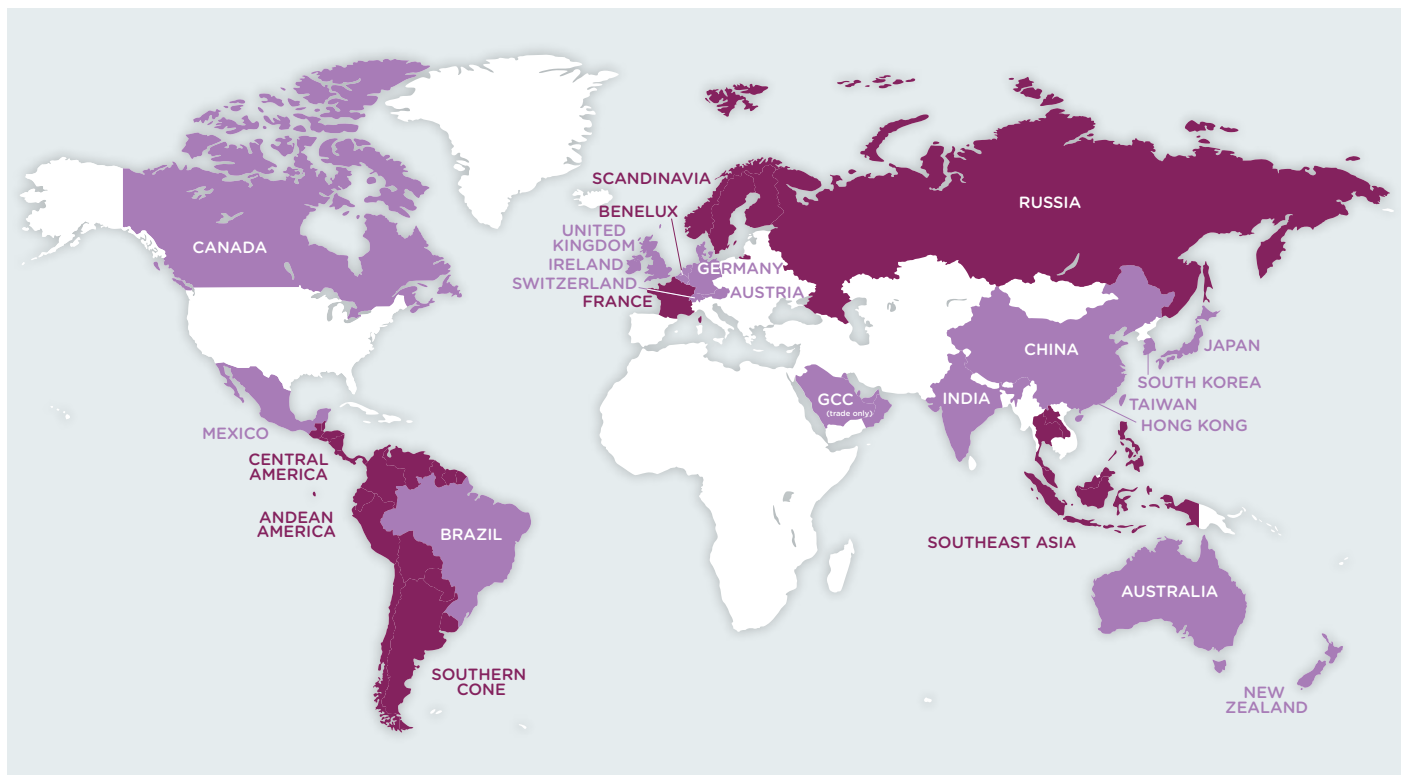
market size) and market opportunity rather than relying solely on past visitation to the USA.

In order to accomplish this, Brand USA utilizes a unique modeling tool that focuses on opportunity (feeder

The following 10 factors contribute at varying weights of importance to the list of high-opportunity target markets where Brand USA will focus its efforts:

Factor	Source
International Travel Expenditure	World Bank Indicators Database
International Departures	World Bank Indicators Database
GDP (PPP)	IMF
GDP (PPP) Growth	IMF
Unemployment	CIA World Factbook
Civil Liberty	Freedom House
Population	CIA World Factbook
Ease of Doing Business	World Bank
GINI (Wealth Distribution)	CIA World Factbook
Special Circumstances	Examples: Inclusion/Added to Visa Waiver, Program, Political Factors, etc.

Based on this criteria, Brand USA currently has marketing initiatives in more than 30 markets that have the highest potential for growth. In total, these markets generate 90% of all inbound travel to the United States.



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

Of these markets, the following 14 are where Brand USA will fully deploy the full range of its marketing activities (consumer, co-op, and trade outreach) during FY15.

	AUSTRALIA		INDIA
	BRAZIL		JAPAN
	CANADA		SOUTH KOREA
	CHILE		MEXICO
	CHINA		NEW ZEALAND
	FRANCE		TAIWAN
	GERMANY		UNITED KINGDOM

These 14 international markets generate 81% of inbound travel to the United States. Every 1% increase in travelers from these markets to the United States results in:

- 570,000 more travelers
- \$1.2 billion more in travel-related spending by international travelers in the United States

Supports Objectives:

#1, #2, #3

Goals:

- Increase incremental visitation and spend to the United States on par or better with the 2013 ROI study
- Protect the United States' share of the international travel marketplace

LEVERAGE INDUSTRY COLLABORATION

Harness the collective force of our partners to drive demand (inspire, engage, activate)

CREATE VALUE

Inspire international travelers to choose the USA for their next trip and create strong calls to action through consumer, co-op marketing, trade outreach, and public relations

Consumer Marketing

Approximately 85% of Brand USA's marketing efforts during FY15 will directly target the consumer through a combination of brand advertising and co-op marketing programs.

Brand Advertising

For FY15 the "Land of Dreams" campaign featuring an original song performed by Rosanne Cash, daughter of American music icon Johnny Cash, will continue to be fundamental to creating awareness and inspiring travel to the United States. Through music, Brand USA is able to convey emotionally what words alone cannot. And by marrying the song to visuals, the campaign showcases the diversity of experiences and places in the USA, including iconic landmarks and beyond the gateway locales.

The creative and messaging featured in the original campaign was informed by consumer research and during FY15 will continue to be enhanced by key learnings based on proprietary research and consumer testing in target markets.

The broadcast component of the campaign will continue to be supported by print and out-of-home campaign elements that captivate the senses ("See It," "Feel It," "Hear It," and "Taste It") and convey personal and experiential possibilities in the USA.



Consumer Target Market

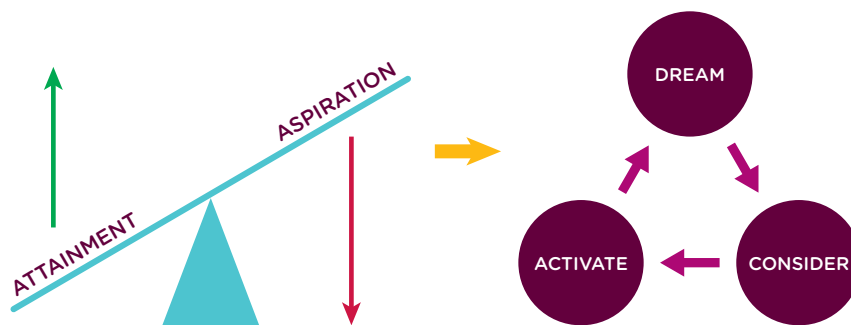
Universally we will target a segment, if not all, of adults aged 25 to 59. In addition to our target consumer generally having the core characteristics of affluent, educated travelers, we will plan media and messaging approaches that speak to any uniquely identified specific local demographic and/or psychographic traits.

It's also important to note that the target markets that will drive the most visitation in the coming years are at different levels of consumer demand and consumer development—requiring a more targeted strategic

approach rather than a blanket approach.

Based on the 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 established markets, such as Canada and the United Kingdom, will concentrate on facilitating and creating strong booking calls to action, while the approach in emerging markets will seek to build awareness and inspire intent to travel.

TARGET TRAVEL CYCLE PHASE



Media Market Strategy

The FY15 plan is to run brand media for the consumer campaign in market during peak travel planning times.

The media mix will include any combination of TV, out-of-home, print, digital and social.

If there is a major change in environment, campaign traction, or other event affecting the campaign, we will re-evaluate and adjust the timing, campaign elements, or media mix accordingly.

NOTE: Schedule and media mix subject to change to optimize media and market opportunities. Designated markets generated 56.6 million of the 69.8 million international arrivals (81%) and \$121.5 billion of the \$180.7 billion in international spending (67%) in 2013. (Source: NTTO)

By Market	
Australia	January - February 2015
Brazil	March 2015 August - September 2015
Canada	March - April 2015
Chile	March 2015
China	June - October 2014 April - May 2015
France	January - February 2015
Germany	February - March 2015
India	January - February 2015
Japan	September - October 2014 May - June 2015
South Korea	May - June 2015
Mexico	May - June 2015 August - September 2015
Taiwan	April - May 2015
U.K.	January - February 2015

Digital and Social Media Strategies

Digital and social media strategies will continue to be an important method to inspire engage, and activate international travelers.

Brand USA has two online identities in the marketplace: Brand USA (www.thebrandusa.com) and Discover America (www.DiscoverAmerica.com).

Brand USA is our industry- and stakeholder-facing name. The name, website and relevant accounts are used to share information with business-related stakeholders, such

as partners, tour operators, travel agents, Federal agency partners, the media, and others.

Discover America is the consumer-facing brand that international travelers associate with travel to the United States. The Discover America website and related social media accounts are used in consumer-facing content and communications. Each market has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

Discover America Current Global Footprint for Social Media Activity

Brand USA through its Discover America brand currently has localized social media efforts in the markets listed below.

In Language Website	Facebook Page Link	Twitter Handle
Canada (English) discoveramerica.ca Canada (French) discoveramerica.ca/fr	Facebook.com/DiscoverAmericaCA	@DiscoverUSAca @DiscoverUSAqc
UK discoveramerica.co.uk	Facebook.com/DiscoverAmericaUK	@DiscoverUSAuk
Japan discoveramerica.jp	Facebook.com/DiscoverAmericaJP	@DiscoverUSAjp
Brazil discoveramerica.br	Facebook.com/DescubraEUA	@DescubraEUA
South Korea discoveramerica.kr	Facebook.com/DiscoverAmericaKR	@DiscoverUSAkr
Mexico discoveramerica.mx	Facebook.com/DescubreeuaMX	@DescubreeuaMX
Australia au.discoveramerica.com	Facebook.com/DiscoverAmericaAUS	@DiscoverusaAUS
Germany de.discoveramerica.com	Facebook.com/EntdeckeAmerika	n/a (not locally relevant)
China GoUSA.cn GoUSA.tw	Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://e.weibo.com/u/3606551013 Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA RenRen: http://page.renren.com/601784091 Youku (YouTube equivalent): http://u.youku.com/美国国家旅游局GoUSA Facebook (Hong Kong & Taiwan): facebook.com/gousa.official	
India discoveramerica.in	Facebook.com/DiscoverAmericaIndia	@DiscoverusaIN
Chile discoveramerica.cl	Facebook.com/descubreusaCL	@DescubreusaCL

DISCOVER AMERICA GLOBAL SOCIAL MEDIA CHANNELS

The following handles are used for global, consumer-facing promotions in English.

Website: discoveramerica.com

Pinterest: pinterest.com/discoveramerica

Twitter: @DiscoverAmerica

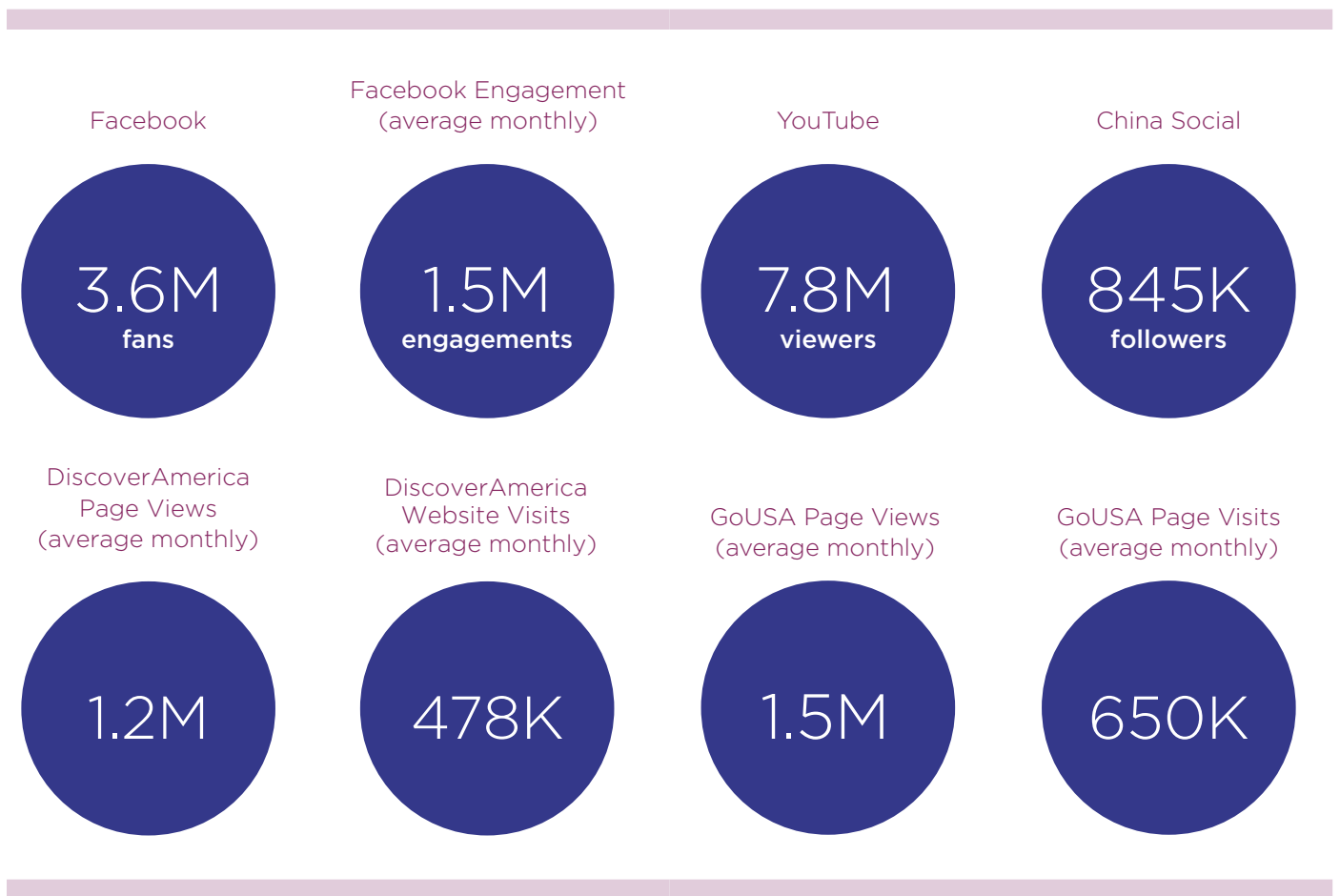
Instagram: DiscoverAmerica

Facebook: Facebook.com/DiscoverAmerica

Google+: google.com/+discoveramerica

YouTube: youtube.com/DiscoverAmerica

While our digital platforms continue to see strong and growing engagement, as well as positive sentiment, there are many opportunities to more fully leverage our digital channels to increase international visitation to the United States.



During FY15, Brand USA will enhance its DiscoverAmerica.com presence in the international marketplace in order to make our primary digital platform the go-to resource for all things travel to the United States. We will accomplish this by:

- Providing original content in as many forms as possible
- Providing valuable, timely information regarding destinations, and experiences, as well as entry policy and processes
- Customizing content to reach targeted international travelers
- Making the site more user friendly and intuitive
- Expanding opportunities for partner content and integration
- Increasing our ability to track key metrics on engagement and activation

CONTENT HUBS

During FY15, Brand USA will build a dynamic and engaging online presence comprised of content hubs themed around its core experience pillars: The Great Outdoors, Urban Excitement, and Culture interspersed with Indulgence (see Core Messaging on page 39)—with the first content hub launching in the Fall of 2014.



This series of content-rich online hubs, strategically integrated within Brand USA's website, will become the trusted go-to source for international travelers. It will target international inbound tourists from each of Brand USA's target markets and serve as a gathering spot for an influential roundup of experts, international and national bloggers, social journalism, and user-generated content.

Our custom-created content hubs will feature a highly engaging, informative, highly visual, always fun and aspirational range of content to support Brand USA campaigns and experience pillars.

Content will include articles, videos, Q&As, blogs, gifs, listicles, quizzes, slide shows, infographics, and other content promoting travel and activities throughout the USA.

Additionally, we will showcase international bloggers' words and images, first-person travelogue tips for both a general and international country-specific context, visuals and music showcasing sights and sounds, and a rich range of original, curated, and crowd-sourced types of content optimized to "speak web." All content will be strategically produced or acquired through co-op promotional campaign, partner or publisher contributions—and optimized to be shareable and influential across the world.

The site's core will encourage exploration of the USA by enabling visitors to plan, consider experiences across the entirety of the USA, and find valuable offers, as well as select or build itineraries that provide a path to book travel.

SOCIAL CAMPAIGNS

Our digital team partners with local experts in each market to apply their global marketing insight to culturally relevant social media content and campaigns. The custom Social campaigns we create provide localized digital and social presence in nine international markets, with one global presence in English.

During FY15, Brand USA will promote global activation campaigns to support The Great Outdoors, Culinary, Travel Like a Local, and Road Trips. After each campaign launch, the category of content created will continue to live across our channels and provide the opportunity to accept additional content from partners on an ongoing basis. Target markets will include: Brazil,

Co-op Marketing

Co-op marketing programs will make up the majority of our consumer marketing efforts in FY15 to increase awareness, engagement, visitation, and spend.

Nearly 90 percent of our co-op marketing activities are directly focused on reaching the international traveling consumer.

This year and going into next year, our co-op programs are more heavily weighted toward delivering compelling content rather than the once-traditional course of advertising in order to connect with travelers in the way they shop today. Content marketing has changed the way people research, consider, and making buying decisions for products and services.

Canada, Chile, Germany, India, Japan, South Korea, Mexico, and the United Kingdom.

Supports Objectives:

#1, #3, #5, #8, #9

Goals:

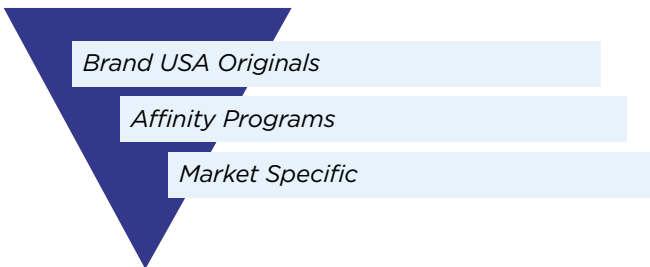
- Increase international video views by 20%
- Increase global website visitors by 20%
- Reduce global bounce rate by 10%
- Double the number of Twitter followers
- Increase YouTube subscriber base by 50%
- Increase time on site by 10%

One of the key benefits of this approach in addition to its effectiveness is that both large and small destinations and organizations can participate cost effectively. Add to that the benefits of leveraging the scale that Brand USA provides, and the value proposition increases exponentially.

There are three paths to value through our co-op marketing platforms and programs:

- Brand USA Originals (programs developed and offered exclusively by Brand USA)
- Brand USA Affinity Programs (marketing platforms developed with media, publishers, and travel booking partners)
- Market-Specific Programs (programs offered in select markets to support market launches or expansion)

THREE PATHS TO VALUE



- Deliver compelling content and valuable activation
- Leverage scale for efficiency
- Foster partnership and collaboration
- Create unique opportunities

Brand USA Originals

Brand USA Originals are marketing programs developed and offered exclusively by Brand USA. They include proprietary programs developed by Brand USA and those created in partnership with influential travel media and major travel and lifestyle brands.

GREAT OUTDOORS

To align with the centennial celebration of the National Parks system, Brand USA will be investing in a multi-million dollar strategy focused on the great outdoors. Initiatives include an internationally released giant-screen film featuring the national parks, a digital content hub, and thematic programs. Details for co-op opportunities will be available in Fall 2014.

Market Reach: Global

CONTENT HUB

Brand USA will create a content hub/website that will promote articles/blogs, photos and videos focusing on the Great Outdoors. It will be Brand USA's main aggregator of content related to all outdoor activities. The beta site will launch in September and the full launch (with partner co-op opportunities) will take place in January.

Market Reach: Global

TRAVEL CHANNEL GREAT OUTDOORS SERIES

Brand USA, in partnership with the Travel Channel, will create an 8-part series highlighting the United States' vast outdoor wonders and experiences. The series will focus on the National Parks and other protected lands.

Target Market: Europe

CULINARY PLATFORMS

In 2014, Brand USA launched the Discover America: Great American Food Stories culinary guide and digital platform to inspire the world to discover the tastes of our nation like never before. Brand USA will continue to develop the culinary strategy to include co-op participation from partners across print, digital, social and other media platforms.

As part of this strategy, Brand USA will produce a second issue of its Great American Food Stories culinary guide in May 2015, which showcases authentic



cuisine across the United States. In the FY15 edition, destination partners will have the opportunity to highlight food traditions and chefs from their region.

Market Reach: Global

TRAVEL CHANNEL ADVENTURES WITH JENI AND OLLY

Last year, Jeni and Olly's West Coast Wine Adventure followed two Travel Channel hosts as they explored the culinary and vineyard delights of California and Oregon. Building on the success of the first series, Brand USA and Travel Channel will partner together to showcase more regions of the United States and the audience will experience them through Jeni and Olly's eyes. The series is scheduled to air in July 2015.

Market Reach: Global

CULINARY SOCIAL MARKETING CAMPAIGN

During FY15, Brand USA will develop a strategic digital & social content platform in conjunction with the print culinary guide to showcase partner destination experiences related to culinary attracting visitors to discover something new & different. Launch scheduled for May 2015.

Target Markets: Initial roll out in Canada, Japan, and the United Kingdom

30 CHEFS, 30 DAYS ON THE FOOD NETWORK

In July 2015, the Food Network will devote much of its schedule to Americana-themed programming. To support this programming block, Brand USA will create vignettes highlighting world-class chefs throughout the United States. The vignettes will air in commercial time throughout the programming block. The series of 2-minute video vignettes featuring 30 Chefs, 30 Days airing 10 times a day during commercial time during the programming block.

Target Markets: South America, the United Kingdom, and the EMEA region (Europe, Middle East, and Africa)

EXPO MILAN (WORLD'S FAIR): FOOD TRUCK NATION

The World's Fair will take place in Milan from May to October 2015, focusing on a theme of feeding the world. The US pavilion will feature James Beard chefs and the Food Truck Nation.

Market Reach: Global

NATIONAL EVENTS CALENDAR

During FY15, Brand USA will build and launch a national calendar tool to promote events, festivals, celebrations and other experiences available in the USA. Partners will have the option to upload information directly into this database, which allows site visitors to search by date, geographic location or type of event. Brand USA will pull events from this database to create themed calendars for use at trade shows and other promotional activities.

CONSUMER MARKET PROFILE REPORTS

Each year, Brand USA prepares proprietary market profile reports, which provide important insight into travelers' perceptions of the USA, as well as general travel behaviors and preferences. A more detailed 100-page deck of research for each of the countries profiled is available with the option of customized tables for a fee.

Information includes desired destinations; criteria for destination selection; perceptions of the USA and competitors; international travel behavior; influence of media channels on destination decisions; and general media consumption.



INSPIRATION GUIDES

Brand USA's official language-specific print and online guides inspire travel by displaying the richness and variety of American experiences to international travelers. Stunning photography and compelling copy are the hallmarks that attract readers. Participating partners also have the opportunity to promote their destination through a featured photo essays. In 2014, more than 550,000 print copies were produced in 10 languages for 18 international audiences. The 2015 guide will be published in the spring of FY15.

MULTI-CHANNEL PROGRAM

Brand USA's market-driven multi-channel programs are created individually for each country and designed to leverage Brand USA's consumer marketing campaigns.



Current Markets:

- Brazil with Ski Focus: Fall 2014
- Brazil: Spring 2015
- Canada: Winter 2015 & Spring 2015
- China: Fall 2014 & Spring 2015
- China with Golf focus: Spring 2015
- Germany: Spring 2015
- Japan: Spring 2015
- Mexico with Ski Focus: Fall 2015
- Mexico: Spring 2015
- United Kingdom: Fall 2014
- United Kingdom with Ski Focus: Fall 2014
- United Kingdom with Golf Focus: Winter 2015

Programs, which are customized based on the channels that are most effective in each country, deliver brand and destination messages through print inserts, digital insert distribution, online advertising, and email marketing. Activation Partners include Thomas Cook, Red Tag Vacations, Gran Plan Aeromexico, HIS Meier's (DERTOUR) and Tam Viagens.

USA DISCOVERY PROGRAM

The USA Discovery Program is a comprehensive online training tool designed specifically for tour operators, travel agents and other travel experts to help them sell the United States as a premier travel destination.

This one-stop shop for everything related to travel to the United States is designed to expand the level of expertise international travel professionals have about the many diverse destinations and experiences available in the United States and inspire them to sell travel to a broad range of destinations. Brand USA launched this innovative platform in the United Kingdom in 2013 and has since expanded the platform to other international markets. The inaugural UK version can be explored by going to USADiscoveryProgram.co.uk. Here, agents can find valuable information on U.S. regions, as well as the 50 states, District of Columbia and five territories that makes up this vast country, as well as experiences and holiday themes that can be found in the USA. The rich content and functionality of this online program provide the travel industry a holistic overview of the USA and offers a variety of cross-selling on all aspects of sales to the USA.

USA Discovery Program Global Rollout:

- United Kingdom and Ireland: Active now
- Australia: August 2014
- India: September 2014
- China and Brazil: December 2014

NATIONAL GEOGRAPHIC ROAD TRIPS

Launched in April 2015, Brand USA partnered with National Geographic to create the Great American Road Trip series comprised of five different journeys to showcase the United States and offer travelers one of the best ways to experience the USA. As part of the series, National Geographic's Digital Nomad journalists spent three to four days in select destinations exploring, blogging and sharing photos and videos of their travels. Brand USA also supported this initiative with a comprehensive digital content and promotion plan. Once the first series of road trips wraps in October 2015, additional road trips will be developed to engage partners interested in leveraging this unique opportunity.

Target Markets: Australia, Brazil, Canada, China, France, Germany, India, Mexico, Russia, Japan, South Korea, Taiwan, and the United Kingdom

STA TRAVEL

Brand USA is extending its multimedia partnership with the Student Travel Association (STA), comprised of online video, email, and social media promotions. STA Travel is a global travel specialist with 30 years' experience advising young people (18-35) on holidays and adventures abroad. With unique offerings on flights, accommodations, and tours, STA Travel services 2 million travelers annually. STA Travel has over 24 million unique visitors, 2 million followers on Facebook and more than 200 retail stores outside the U.S.

For FY15, Brand USA and STA are building on the success of their inaugural 2013 road trip campaign showcasing the United States to the global youth audience. In the next phase of this partnership, Brand USA is developing more engaging content to inspire the international audience to discover America and its vast experiences. Brand USA is launching a campaign to highlight the hidden treasures of America, carefully selecting highly established social media influencers to embark on the "All-American Treasure Hunt," a race to discover hidden and beyond the gateway destinations throughout the United States while sharing their experiences and encouraging participation through their social media channels. The 'Quest' will begin in the Fall of 2014 and run through August 2015.



Target markets include Austria, Australia, France, Germany, South Korea, New Zealand, and the United Kingdom.

DISCOVER AMERICA GLOBAL WEBSITES

The DiscoverAmerica in-language websites are designed to help inspire international visitors and travel influencers to choose U.S. travel destinations, travel providers, and experiences. From sponsoring content on City, State, and Experience Pages, participating organizations can reach international travelers and influence increased visitation and spend to a variety of U.S. destinations, travel brands and attractions.



Target markets currently include Brazil, Canada, Chile, Germany, India, Japan, South Korea, Mexico, and the United Kingdom.

GOUSA WEBSITE - MULTIPLE PLATFORMS

Partners can expand their reach to the fastest growing market of visitors to the U.S. with Brand USA's Chinese-language sites – GoUSA.cn and GoUSA.tw – which have generated more than 2 million visitors to date. Three different package levels are available—each customizable to support the promotion of destinations and travel brands. Features include:

- A unique landing page with activities based on Brand USA's six distinct categories: Art, Shopping, Entertainment, History, Outdoors and Food
- A partner-specific URL within GoUSA.cn and GoUSA.tw to more easily drive traffic through destination-specific campaigns
- Tailored social media posts that push your activities to over 1.1 million followers on China's #1 social platform, Sina Weibo
- Homepage promotions and more

Target markets include China, Hong Kong, and Taiwan.



IN-LANGUAGE VIDEOS

Brand USA's In-Language Video Program creates and distributes in-language multimedia content to help U.S. destinations promote their experiences to international travelers. Video content is customized to the specific international audience's point of view and targeted to interest based on the Brand USA experience pillars (Great Outdoors, Urban Excitement, Culture, and Indulgence) and country.

Specialty in-language videos have recently been launched to specifically promote attractions and culinary.

Participating destinations can distribute video content through their own marketing channels. Additionally, Brand USA will distribute the content for one year through its digital channels:

- On a dedicated content page on the appropriate language site on Discover America
- Through a featured Trip Ideas tile on the in-language State page on Discover America
- On Discover America's YouTube channel
- Additional options for enhanced video distribution platforms are also available for this program, which are powered by Rocket Fuel, Outbrain, Facebook, and Orbitz using themed platforms designed to drive online traffic

These videos are also included in our Multi-Channel Campaigns—which have driven tremendous results—well above industry average results:

- Germany Winter 2013: Tripled industry average for CTR: 22% (industry average 8%)
- Canada West Winter 2014: More than doubled industry average CTR: 19% (industry average 8%)

- Mexico Spring 2014: Surpassed industry average CTR: 10.66% (industry average 6%)
- UK Winter 2014: More than tripled industry average CTR: 25% (industry average 8%)
- UK Winter 2014 Virgin Holidays Activation Partner: 441 packages booked, representing a 14% in booking during campaign timing

Target markets include Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, Italy, Japan, South Korea, Mexico, Netherlands, Russia, Taiwan, and the United Kingdom

TRIPTUNER

This interactive, patent-pending online platform helps travelers discover destination experiences based on their tastes. A unique design delivers tailored destination, hotel and activity options – with no typing, text links or lists. Brand USA offers this dynamic, interactive tool across all Brand USA digital channels to promote experiences “tuned” specifically to travelers' interests.

Target markets include Brazil, Canada, Germany, Japan, South Korea, Mexico, and the United Kingdom

SOCIAL CAMPAIGNS

Custom Social campaigns provide localized digital and social presence in 13 international markets, with one global presence in English. Currently, there are three global activation campaigns. After each campaign launch, the category of content created will continue to live across Brand USA's channels and provide the opportunity to accept additional content from partners on an ongoing basis.

Target markets include Brazil, Canada, Chile, Germany, India, Japan, South Korea, Mexico, and the United Kingdom [need to list the other four]

INTERNATIONAL SEM PROGRAM

Search Engine Marketing is a key component of Brand USA's international marketing efforts, focusing on bringing millions of visitors to the United States. By participating in the Brand USA International SEM program, you can extend your destination's current search budget, drive more traffic directly to your website and attract more international visitors.

MEDIA AND PUBLIC RELATIONS: BRAND USA MEDIA NETWORK POWERED BY TRAVMEDIA

By working with the leading travel news service, TravMedia.com, Brand USA has the tools to reach more than 25,000 journalists worldwide. This interactive online newsroom includes a live feed of news and published stories, and the capability to post news releases and other announcements with photos, captions and related resources, as well as have conversations with journalists within the platform.

BRAND USA UNITED STATES OF SPORTS WITH ESPN

Brand USA is partnering with ESPN to promote the USA sporting experience to travelers around the world. The multimedia campaign with ESPN will highlight the diversity of sporting experiences available in the United States in a fresh and unexpected light. The partnership will include a global media campaign consisting of digital and television media as well as interactive content features that will live on the brand new “United States of Sports” hub on DiscoverAmerica.com. This hub will be the center of all sports entertainment content on the website, giving partners an opportunity to showcase their individual sporting offerings. Partners will be able to create city and state pages that will be supported by Brand USA marketing initiatives. The program is scheduled to run through April 2017.



Target markets include Africa, Australia, Europe, and Latin America.

TRAVELZOO

With over 26 million subscribers, Travelzoo has the largest offering of travel deals online. Through this Brand USA Originals co-op program, partners can expand their reach from a selection of seven key international markets with Travelzoo’s custom 360-degree turn-key marketing solution reaching their highly engaged and responsive subscribers. Each Brand USA co-branded Newsflash email can be a stand-alone promotion or a co-op solution for states and regions.

Target markets include Australia, Canada, China, France, Germany, Japan, and the United Kingdom.

PPTV

Top 3 IPTV platform in China and will feature 12 part video series across their platform. PPTV is a very popular app in China. Includes video content and media promotion.

Target Market: China

KANKAN

A video sharing site that will feature GoUSA video content on 3 different channels: film, lifestyle and gaming. Includes video content syndication and media buy.

Target Market: China

QUANAR

Top 2 travel destination website in China to look at flight deals and information about traveling locally and abroad. GoUSA will receive a site-wide feature. Agreement includes mini-site, content syndication and media buy.

Target Market: China

BREADTRIP

With over 20 million downloads and 1 million active daily users, Breadtrip is currently the most popular travel companion for Chinese travelers. Includes content syndication and media buy.

Target Market: China

LETV

LETV sponsoring a celebrity trip to NY, CA and LA through 6 part mini-series and feature in a book written by the celebrity. Includes celeb trip plus media buy.

Target Market: China

SINA

The biggest web portal for users in China. Agreement includes unique content syndication and media buy.

Affinity Programs

Affinity Programs are co-op programs that Brand USA has developed with media, online travel agencies (OTAs) or other travel-related publishers. By utilizing these programs to advertise and promote destinations, experiences, attractions and other travel opportunities, they are a particularly valuable way to inspire travelers to book their next experience in the USA.

EXPEDIA

Expedia Media Solutions has more than 150 travel branded sites across 70 countries. A leader in Canada, Asia, Europe, the Middle East, Africa and Latin America, Expedia reaches nearly 80 million unique users.

Target markets include Argentina, Austria, Australia, Belgium, Brazil, Canada, Chile, China, Denmark, Finland, France, Germany, India, Ireland, Italy, Japan, South Korea, Mexico, Netherlands, New Zealand, Norway, Russia, Singapore, Spain, Sweden, Switzerland, Taiwan, and the United Kingdom.

ORBITZ WORLDWIDE

Orbitz Worldwide delivers a broad range of online marketing and advertising opportunities across a global portfolio of leading consumer and business travel brands. The Orbitz suite of OTA brands includes CheapTickets, ebookers, Mr. Jet, HotelClub, and RatesToGo and reaches nearly 30 million unique visitors monthly in target markets.

Target markets include Australia, Brazil, Canada, China, France, Germany, India, Japan, South Korea, Mexico, Taiwan, and the United Kingdom.

Target Market: China

MAFENGWO

Known for its great content and itineraries, Mafengwo will build a dedicated page within their platform for GoUSA. Currently the #1 go-to travel website for people to find more information from actual travelers. Includes mini-site for GoUSA.

Target Market: China

TRIPADVISOR

As the largest online travel site in the world with 17 travel brands, TripAdvisor delivers a significant opportunity to generate a global presence in 33 countries and 21 languages. TripAdvisor reaches 103 million travelers monthly who are actively researching and planning travel.

Target markets include Argentina, Australia, Brazil, Canada, Chile, China, Denmark, France, Germany, Italy, India, Japan, Mexico, Netherlands, Norway, Russia, Sweden, Singapore, South Korea, Taiwan, the United Kingdom and Ireland.

ESSENTIALLY AMERICA

Essentially America is a leading international consumer travel magazine about the USA, and is printed and distributed in multiple languages.

*Current target markets and roll out include:
United Kingdom: November 2014 and February 2015
Germany: January 2015
Canada: March 2015*

Market-Specific Programs

Market Specific Programs are launched in individual markets and focus on attracting international travelers from specific markets. Over time many of these programs will evolve and be offered in other markets — but always customized to speak to the international traveler of that market.

MARKET ENTRY PROGRAM

Partners are now able to focus their co-op marketing efforts with programs that have been designed to reach specific markets. By working directly with our in-country experts, and with just a small contribution into this program, you'll be able to launch or expand your marketing efforts in a variety of growth markets. Turnkey programs developed by our in-country representatives will provide essential services to reach the travel trade industry; launch products; create awareness; participate in key in-market trade shows; introduce the destination or brand; participate in missions, roadshows and training seminars; and receive one-on-one consulting support to support your sales and marketing teams.

Market entry programs are currently available for Australia, Canada, China, India, Japan, Mexico, and the United Kingdom.

VIRGIN HOLIDAYS

Virgin Holidays is the largest, most successful transatlantic tour operator, and market leader for travel to the USA. Brand USA and Virgin Holidays are partnering with MSN to create a bespoke USA digital campaign across multiple platforms: mobile, tablet and desktop. MSN will create an interactive map broken out by region, viewable as a map, image or list. Each destination will have an opening 30 second video, showcasing the three “must do’s.” The map will then be layered with an itinerary builder, pins, content and an ability to search vertically by categories such as food or entertainment. This program is currently available through August 2015.

Target Market: United Kingdom

AMERICAN JOURNAL

America Journal is a leading German lifestyle and travel magazine published bi-monthly. It offers travel inspiration, practical information and unique stories about the U.S. Brand USA is offering limited opportunities to be included in 2 sponsored issues focusing on skiing and winter sports and golf. This program will run in January and March 2015.

Target Market: Germany



MEIER'S

Meier's Weltreisen is a leading tour operator in Germany with over 30 years' experience in the German market. Brand USA is offering limited opportunities for OOH media, direct consumer emails and travel trade promotions. This program will run from November 2014 through February 2015.

Target Market: Germany

TOUR OPERATOR PROGRAMS

Brand USA will develop two tour operator programs per market over the next year.

Target Market and Activation Period: TBD

CONSUMER PROGRAMS

Brand USA will develop one to two consumer co-op programs per market over the next year.

Target Market and Activation Period: TBD

Supports Objectives:

#1, #5

Goals:

- Increase partner program participation by 20%
- Maintain partner retention of 94% or better
- Achieve 90% of program performance goals (the aggregate of all programs)

Trade Outreach

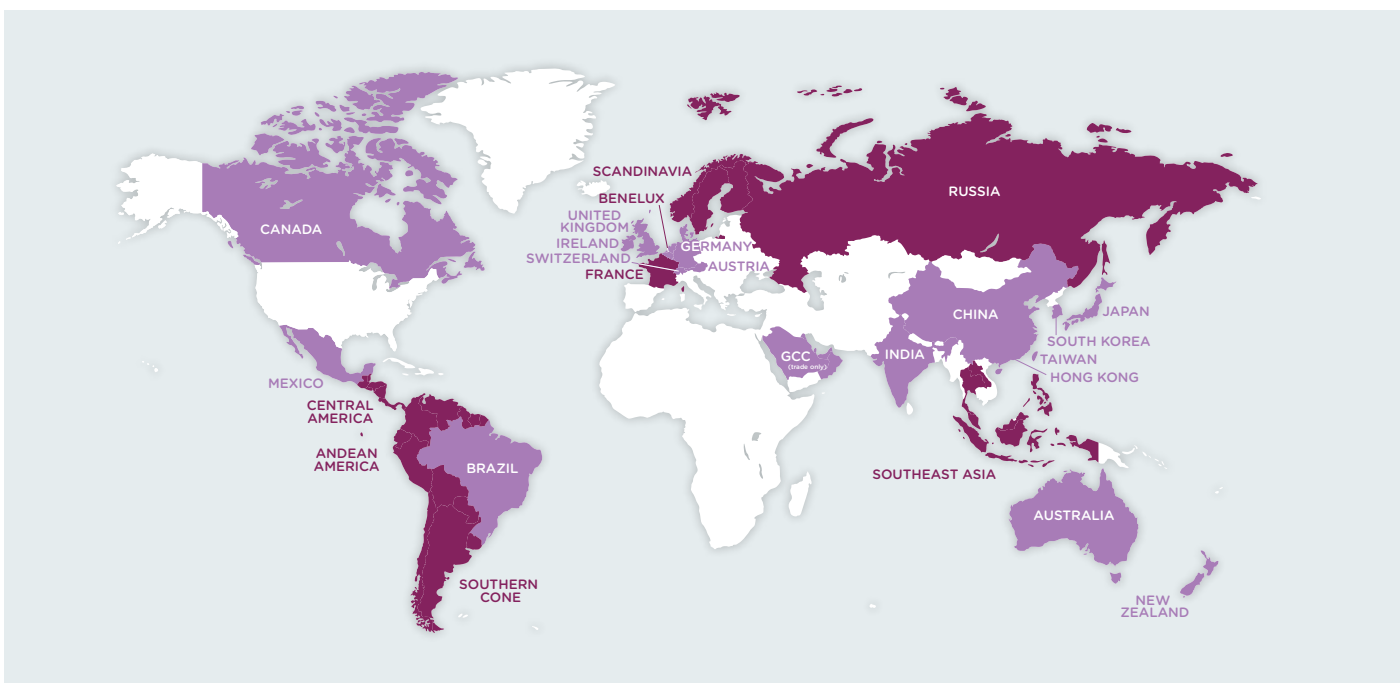
During FY15, Brand USA will work with its expanding network of international representatives, Visit USA committees, and travel and tourism advisory boards to support participation in numerous trade activities, including:

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

International Representation Network

During FY15, Brand USA will increase its international representation network from 20 to 25 markets—opening offices to represent the USA’s interests in Southeast Asia (Singapore, Malaysia, Indonesia, Thailand, and the Philippines), the Benelux Region, France, Russia, Scandinavia, the Andean Region and Southern Cone of Latin America, and the Gulf Coast Countries of the Middle East (Bahrain, Kuwait, Oman, Saudi Arabia, and United Arab Emirates).

This expansion will take Brand USA’s international network to the markets that generate 90 percent of all inbound travel to the USA.





Trade Shows

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

Brand USA will serve as the unifying element at these shows, representing U.S. travel and tourism interests on a global scale, with destinations, travel brands, and other organizations of all shapes and sizes participating as exhibitors. Participating organizations retain their own identity yet benefit from being part of a more visible, collaborative United States effort.

To further amplify the USA's and participating partners' presence, Brand USA will also organize related events before, during, and after many of these shows.

Unified Brand USA pavilions provide exhibitors:

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

Sales Missions

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

Building on the success of Brand USA's sales missions to India in 2012, 2013, and 2014, we have expanded our reach into other key markets and currently have sales missions scheduled as follows:

- Hong Kong: November 11-12, 2014
- Australia and New Zealand: February 2015
- India: September 2015

Road Shows

Our outreach will also include taking participants directly to the travel trade in international markets via Road Show events. Brand USA and partner organizations are able to connect directly with tour operators, travel agents, and other travel buyers through a series of seminars, receptions and events where participating partners acquire the knowledge and information needed to better promote the United States as a travel destination. The FY15 Road Show schedule includes:

- Australia: Spring 2015
- Canada: Fall 2015
- Nordic Region: Fall 2015



Themed Events

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

Training Initiatives

Two distinct Brand USA travel trade training initiatives provide the tools and information our international travel buyers need in order to sell, up-sell and cross-sell U.S. travel destinations and experiences: Training Seminars and the USA Discovery Online Training Platform.

TRAINING SEMINARS

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

USA DISCOVERY ONLINE TRAINING PLATFORM

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

Modules focus on certain states or areas, and travel agents and tour operators can earn specialist badges as they complete each section. Having already successfully launched the training platform in the United Kingdom, we are now introducing the platform into new markets during FY15, including:

- Australia: August 2014
- India: September 2014
- Canada: October 2014
- China and Brazil: December 2014

MegaFams

Launched by Brand USA in 2013, familiarization tours, or “fams,” are an integral part of the organization’s marketing strategies to create awareness of the diverse destinations and travel experiences that are available throughout the United States. The Brand USA fam tours are called “MegaFams” because they are the largest multi-itinerary simultaneous familiarization tours conducted in the United States.

Brand USA organizes and coordinates these diverse U.S. travel experiences in order to more fully promote multiple destinations. They are especially effective in driving awareness of and motivating the travel trade to sell beyond-the-gateway experiences to their clients, because the itineraries include a broad range of travel experiences, attractions and brands from the popular gateway cities to off-the-beaten path encounters. Through Brand USA MegaFam experiences, travel agents and tour operators are better informed, empowered, and inspired to sell a multitude of U.S. destinations.

- Australia and New Zealand with Qantas Airlines: November 2014
- Australia and New Zealand with Hawaiian Airlines: March 2015
- Canada with Air Canada: Dates TBD
- Germany with Lufthansa: Spring 2015
- South Korea: Dates TBD
- United Kingdom: Dates TBD

Supports Objectives:

#7

Goals:

- Maximize partner participation in trade shows, road shows, and sales missions
- Increase bookings to the USA by MegaFam travel trade participants by 10%



MARKET THE WELCOME

Work with our federal government partners to maximize and communicate ease of entry processes, programs, and progress



A very important part of our mission involves “marketing the welcome”—presenting a welcoming message to international travelers, communicating travel policies and building a program for destination and airport partners.

Two key opportunities for rolling out our efforts in this area are at the various trade shows where we host USA pavilions—and by creating an arrival hall package for airports, embassies, and destinations.

There are two elements to the plug-and-play plan: out-of-home and video.

The gist of the out-of-home element is a plug-and-play template that Brand USA would put together for airports, mainly various types of out of home that airports and their destinations could “order” with localized imagery and their destination call-to-action.

On the video side, we’d also look to create a “shell” video that is inviting and informational. The “modular” video would be made of interchangeable, customizable components that can include:

- Inspirational (inspiring imagery, Brand USA content)
- Inviting (call-to-action with specific destination experiences; customizable)
- Welcoming and Thanking (specific to target destination, with a “welcome to” message)
- Educational (covering the entire spectrum of travel policy information)

Different cuts of the modules can be used in different places, and there can be both Brand USA and partner tags.

- The inviting and welcoming segments would largely be footage supplied from destination partners.
- The educational components would be developed and shot in conjunction with the Departments of State and Homeland Security.

Distribution of different modules will include Brand USA and embassy websites, partner websites, consular waiting areas, in-flight, in arrival halls, etc. Here again, there will be opportunities for partner tags.

Supports Objectives:

#5, #9

Goals:

- Deploy international arrival hall program in 5 of the 17 target airports in FY15
- Increase customer satisfaction by 10% (based on Federal partner satisfaction surveys)
- Maintain partner retention of 94% or better
- Achieve 90% of program performance goals (the aggregate of all programs)

DRIVE RESULTS

Make market-driven decisions and track results based on sound research and analytics

Brand USA has established a robust research and analytics plan to provide both market intelligence and track the performance of the overall marketing strategy.

Comprised of a combination of performance tracking and market insights, the information collected through this process enables Brand USA to plan its marketing intelligently, efficiently, and effectively.

MEASURING SUCCESS BRAND USA RESEARCH ANALYTICS SUMMARY APPROACH

Research Type	Marketing Objective	Metrics Category	Metric	Methodology	Source(s)	Reporting Frequency	Launch Date (Calendar Year)
Intelligence	Marketing Strategy	Market Intelligence	Traveler behaviors, Preferences and perceptions	Online survey, 1,500 completes per campaign/test market	PhoCusWright	Annual	Fall 2013
			Market share of outbound tourism from target markets, total and by channel	Actuals as reported by global government organizations and tourism boards, reservation distribution systems	UNWTO plus others TBD	Annual (plus subset potentially monthly)	Winter 2013
			Competitor advertising monitoring	Actual values	Media vendors	Annual	Currently in Place
	Advertising Development	Creative Testing	Traveler reaction to ad creative	Online survey, 1,500 completes per campaign/test market	Ipsos	Semi-Annual	Currently in Place
Performance	Advertising Efficiency	Marketing Mix Optimization	Geographic distribution of ad units and cost	Actual values	Brand USA internal data plus media vendors	Monthly	Q3 2013
			Media channel distribution of ad units and cost	Actual values	Brand USA internal data plus media vendors	Monthly	Q3 2013
	Advertising Effectiveness	Awareness	Total brand media Impressions	Actual values	Brand USA internal data plus media vendors	Monthly	Currently in Place
			Consumer destination familiarity	Online survey, 1,500 completes per campaign market	Ipsos	Semi-Annual	Currently in Place
		Engagement	Clicks on digital ads	Actual values	Brand USA internal data plus media vendors	Monthly	Currently in Place
			Website visitation	Actual values	Brand USA internal data	Monthly	Currently in Place
		Consideration & Action	Search volume	Actual values	Data partner and general search engines	Monthly	Q4 2013
			Consumer intent to visit	Online survey, 1500 completes per campaign market	Ipsos	Semi-Annual	Currently in Place
	Sharing	Purchase	Total inbound visitation and expenditure by source market	Paper survey sampling 0.2% of all international passengers	OTTI Dept. of Commerce	Annual	Currently in Place
			Attributable increase in visitation and expenditure	Calculated as the delta between forecasted visitation and spend based on historical performance (including confounding factors) and actuals reported by OTTI	TBD RFP to be issued Q3 2013	Annual	Q4 2013*
			Attributable increase in economic impact	Calculated based on attributable visitation and expenditure metrics	TBD RFP to be issued Q3 2014	Annual	Q4 2013*
		Consumer sentiment index	Consumer net promoter score	Online survey, 1,500 completes per campaign market	Ipsos	Semi-Annual	Currently in Place
	Consumer sentiment index		Volume and semantic analysis of consumer generated content on social networks and travel websites	TBD RFP to be issued Q3 2013 unless received as in-kind contribution	Monthly	Q4 2013*	

*Subject to vendor availability and timing

Performance metrics are key for us to not only report on our progress to stakeholders, but also for internal day to day activities. We utilize a broad range of performance metrics for continual improvement and optimization of media buys and messaging. Market and media prioritization drives the budget allocation to insure we place investments in the right places at the right times for maximum global impact. We strive to create balance between established and emerging markets, utilizing our cultural and commercial insights to drive media choices.

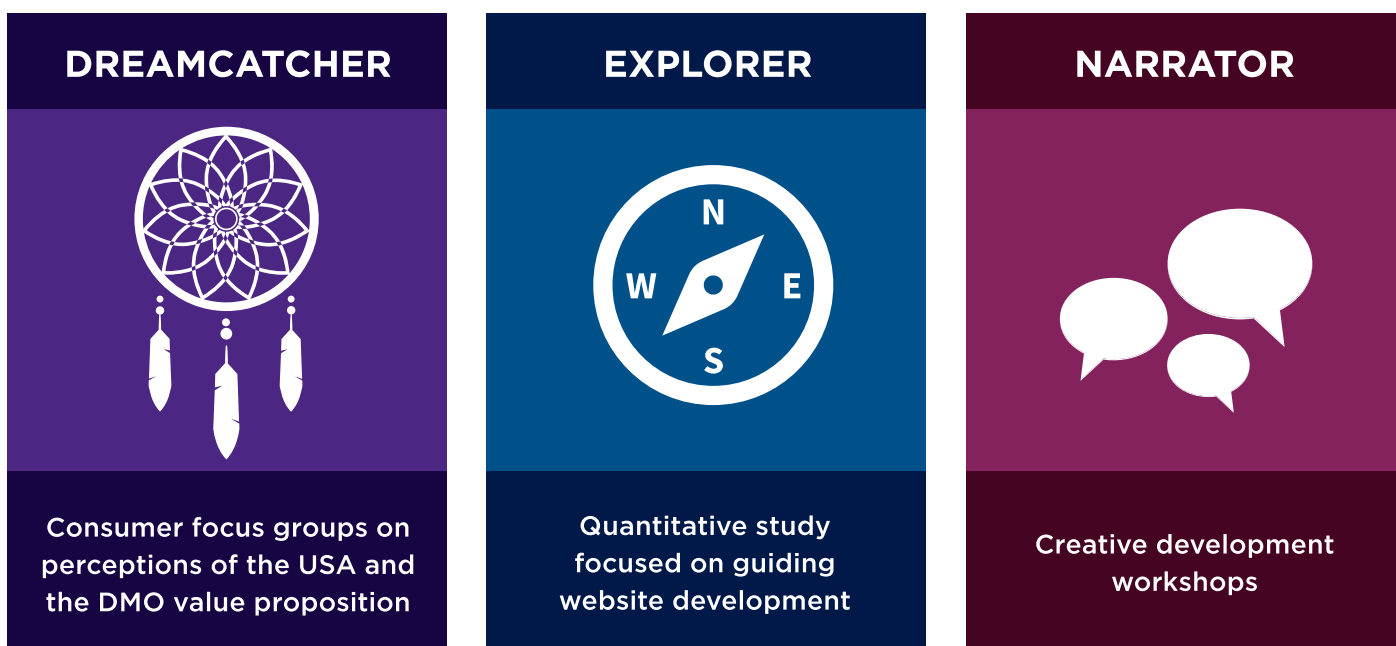
Market Intelligence is essentially the library from which we draw insights on an ongoing basis. In addition to fueling our own activities, we share information with our partners to make the entire Brand USA partner ecosystem more effective. Ad and creative testing is used to make sure our media is reaching the intended audience and that our creative and messaging is hitting the mark.

Project Phoenix

After several years, we believe it's time for a fresh campaign fueled by the many things we've learned from "Land of Dreams." Project Phoenix is a multifaceted research project designed to yield insights that will drive new creative and website. Dreamcatcher is the first phase of research and is designed to help us understand holistically what travelers think about the US and how they make a decision to travel to a particular destination.

The second phase of research in this project, Explorer, will launch in the fall of 2014 and will be focused entirely on driving insights for the DiscoverAmerica.com website. This research will help us enhance the current consumer website--its content, interactivity, features, and functionality, as well as its overall design.

The objective of the final stage of this research, Narrator, is to support new creative messaging and imagery for all of our consumer-targeted marketing initiatives.





MARKET PROFILES

About Brand USA Proprietary Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCusWright, Inc. to initially conduct proprietary consumer research in 10 markets around the world (Australia, Canada, China, France, Germany, India, South Korea, Japan, Russia and the UK). Two additional markets were added in 2014 (Brazil and Mexico). Respondents were recruited

from an online panel. For markets outside of North America, the results reflect responses from adults who travel outside of their continent for leisure. The objective of the Global Market Intelligence program is to gain insight into travelers' perceptions of the USA its competitors, as well as general travel behaviors and preferences.



Australia

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Local Lifestyle	49%
Cultural Historical Attractions	48%
Beaches/Seaside Attractions	40%
Shopping	35%
Dining/Gastronomy	34%

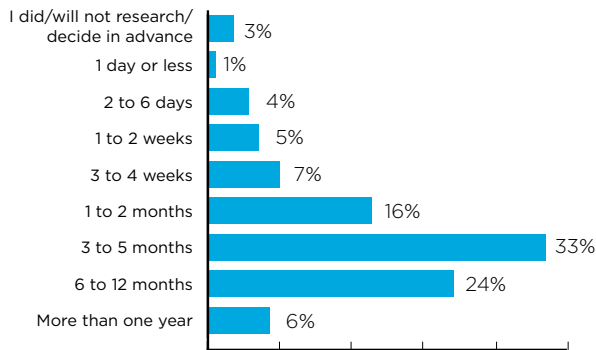
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	42%
Energetic	38%
Friendly	38%
Adventurous	37%
Trendy	23%

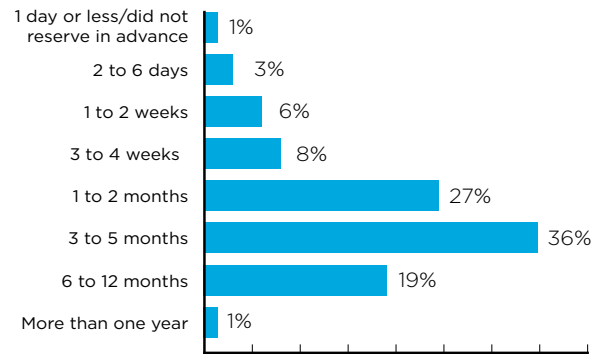
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Australia Intercontinental travelers (Weighted N=1,056) Source: Brand USA Custom Study

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. Base: Australia Intercontinental travelers (Weighted N=1,056) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	61%
Personal recommendations from family and friends	33%
Websites/applications via tablet	23%
Information in printed travel guidebooks	23%
Printed publications, articles and brochures	19%

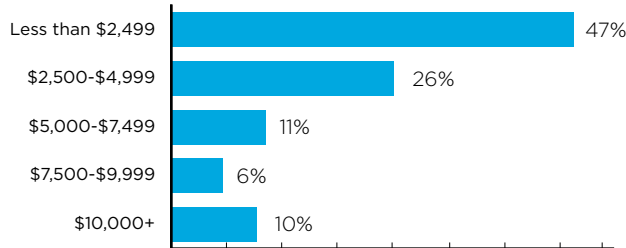
Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Australia Intercontinental travelers (Weighted N=1,056) Source: Brand USA Custom Study

Countries travelers from Australia would most like to visit



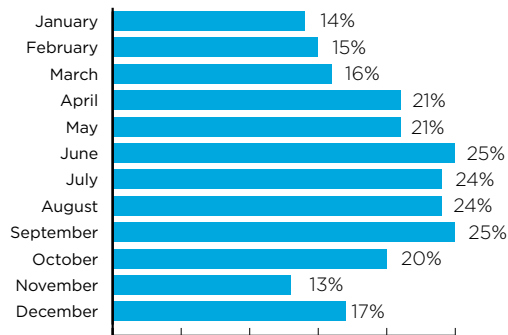
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,581	\$2,805



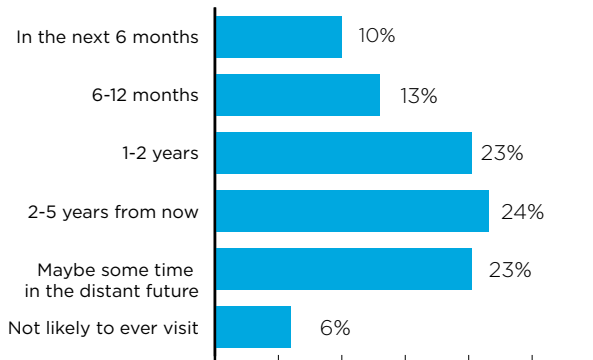
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Australia Intercontinental travelers (Weighted N=1,056) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion AUD to USD=0.935)

Months Traveled (April 2012 - April 2014)



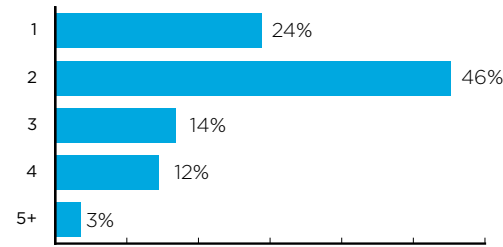
Question: During what month(s) did you take your N holiday(s)? Base: Australia Intercontinental travelers (Weighted N=1,056) Source: Brand USA Custom Study

Likelihood of Travel to USA



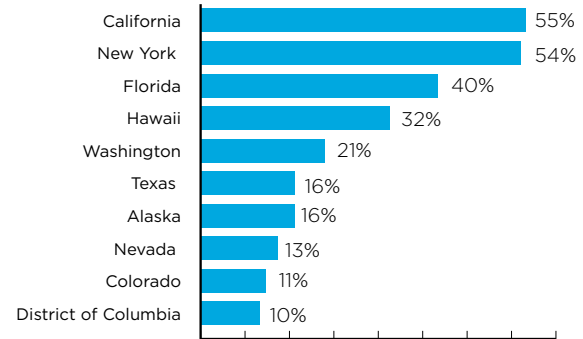
Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Australia Intercontinental travelers (Weighted =1,056) Source: Brand USA Custom Study

Expected Travel Party Size of Next Intercontinental Trip



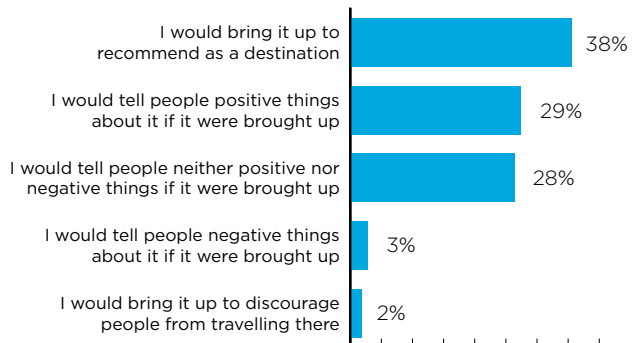
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Australia Intercontinental travelers (Weighted N=1,056) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Destination Interest - Top 10 States



Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Australia Intercontinental travelers with interest in visiting the United States (Weighted N=988) Source: Brand USA Custom Study

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? Base: Australia Intercontinental travelers (Weighted N=1,056) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	63%
Shopping	62%
Local Lifestyle	57%
Dining/Gastronomy	56%
Urban Attractions/Nightlife	56%

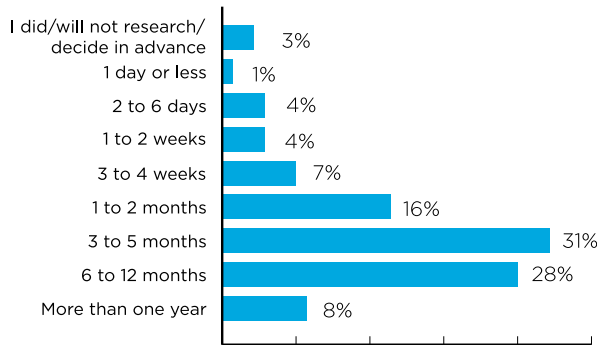
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	45%
Down-to-earth	38%
Sophisticated	37%
Energetic	33%
Creative	32%

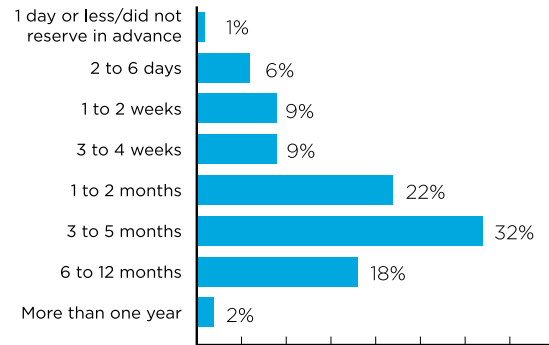
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Brazil Intercontinental travelers (N=1,003) Source: Brand USA Custom Study.

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. Base: Brazil Intercontinental travelers (N=1,003) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer	64%
Personal recommendations from friends/family	51%
Information in printed travel guidebooks	35%
Websites/applications via tablet	34%
Online advertising/email	32%

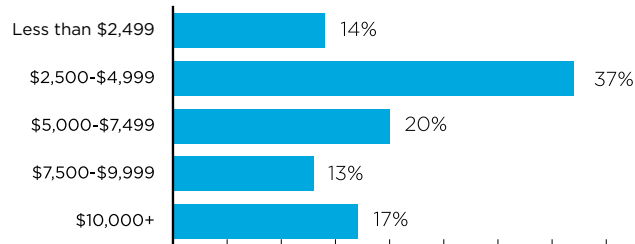
Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Brazil Intercontinental travelers (N=1,003) Source: Brand USA Custom Study

Countries travelers from Brazil would most like to visit



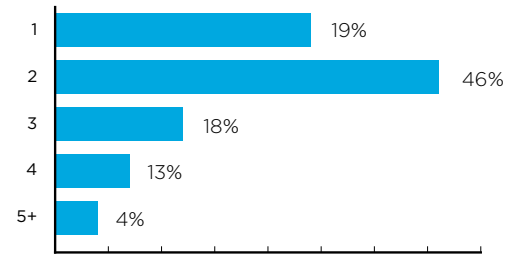
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$7,360	\$4,969



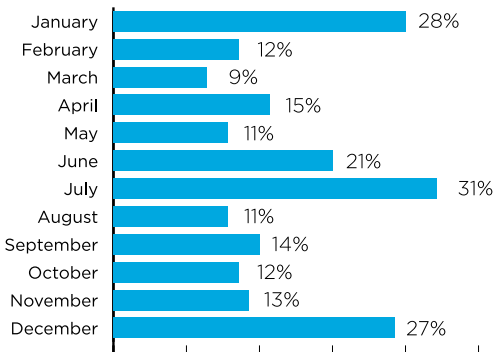
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Brazil Intercontinental travelers (N=1,003) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion BRL to USD=0.452)

Expected Travel Party Size of Next Intercontinental Trip



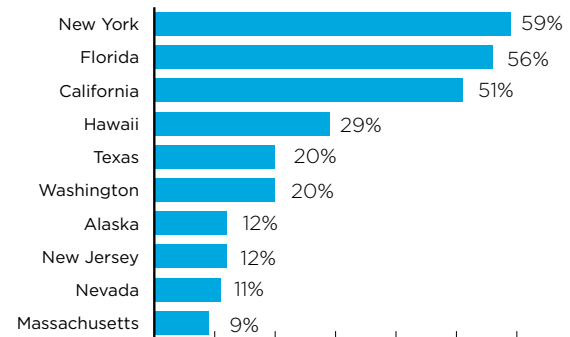
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Brazil Intercontinental travelers (N=1,003) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



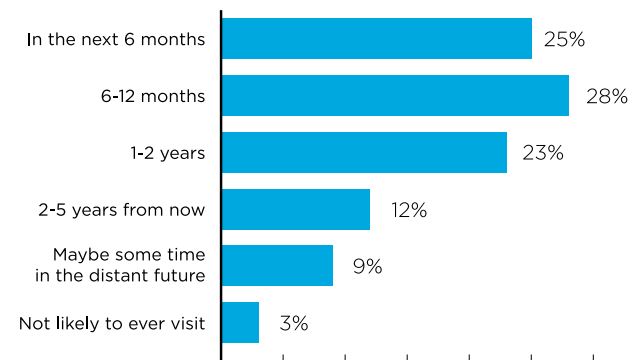
Question: During what month(s) did you take your N holiday(s)? Base: Brazil Intercontinental travelers (N=1,003) Source: Brand USA Custom Study

Destination Interest - Top 10 States



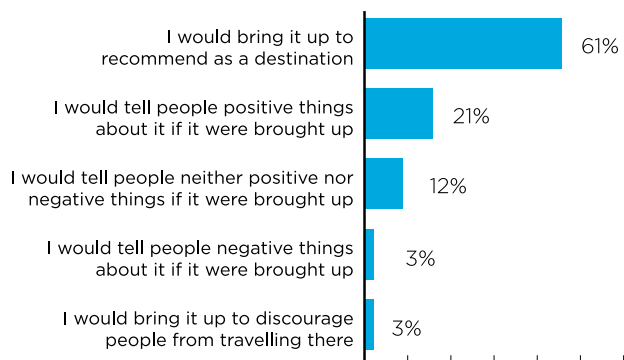
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Brazil Intercontinental travelers with interest in visiting the United States (N=973) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Brazil Intercontinental travelers (N=1,003) Source: Brand USA Custom Study

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? Base: Brazil Intercontinental travelers (N=1,003) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Beaches/Seaside Attractions	54%
Cultural Historical Attractions	48%
Local Lifestyle	44%
Dining/Gastronomy	38%
Urban Attractions/Nightlife	34%

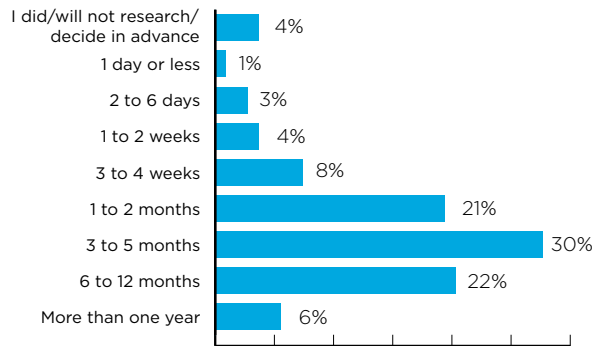
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	45%
Friendly	37%
Adventurous	30%
Energetic	28%
Trendy	25%

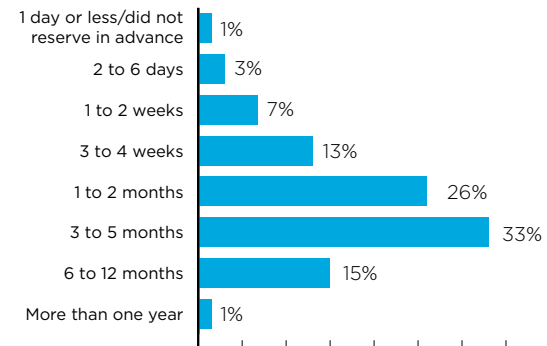
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Canada Intercontinental travelers (N=1,016) Source: Brand USA Custom Study

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. Base: Canada Intercontinental travelers (N=1,016) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	64%
Personal recommendations from family and friends	45%
Information in printed travel guidebooks	24%
Personal advice from travel professionals/travel agents	24%
Websites/applications via tablet	22%

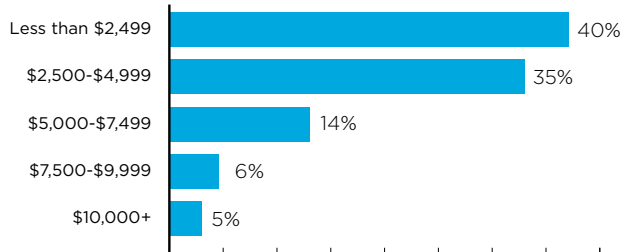
Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Canada Intercontinental travelers (N=1,016) Source: Brand USA Custom Study

Countries travelers from Canada would most like to visit



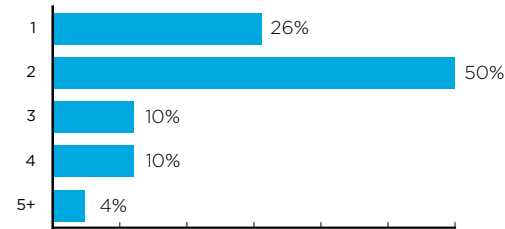
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,072	\$3,055



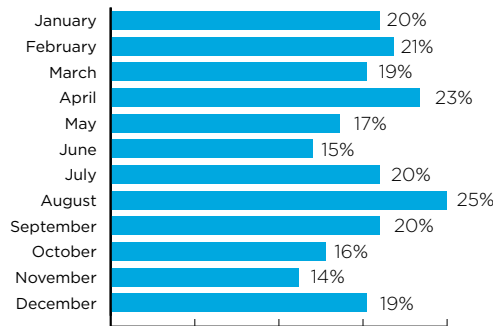
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Canada Intercontinental travelers (N=1,016) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion CAD to USD=0.955)

Expected Travel Party Size of Next Intercontinental Trip



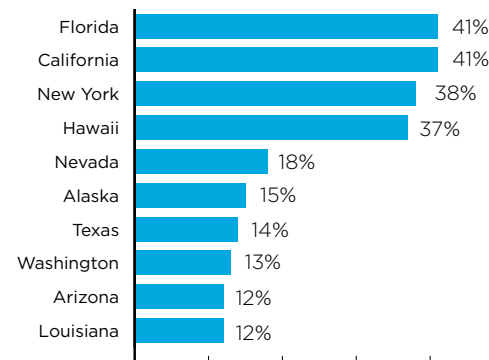
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Canada Intercontinental travelers (N=1,016) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



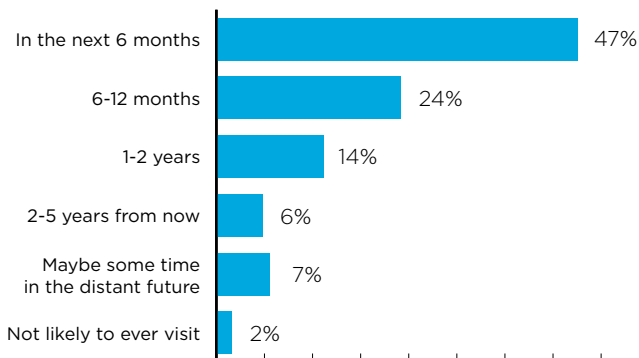
Question: During what month(s) did you take your N holiday(s)? Base: Canada Intercontinental travelers (N=1,016) Source: Brand USA Custom Study

Destination Interest - Top 10 States



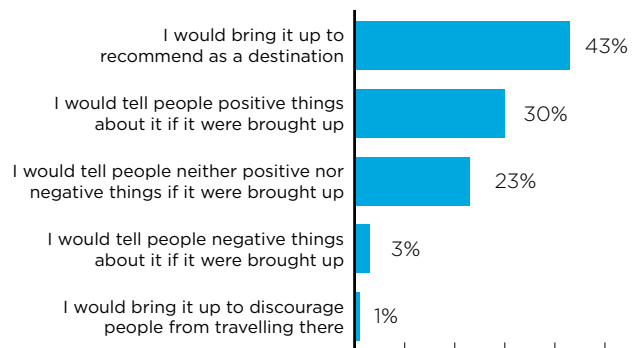
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Canada Intercontinental travelers with interest in visiting the United States (N=999) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Canada Intercontinental travelers (N=1,016) Source: Brand USA Custom Study

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? Base: Canada Intercontinental travelers (N=1,016) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Ecotourism and Nature	73%
Cultural Historical Attractions	67%
Beaches/Seaside Attractions	61%
Urban Attractions/Nightlife	59%
Dining/Gastronomy	54%

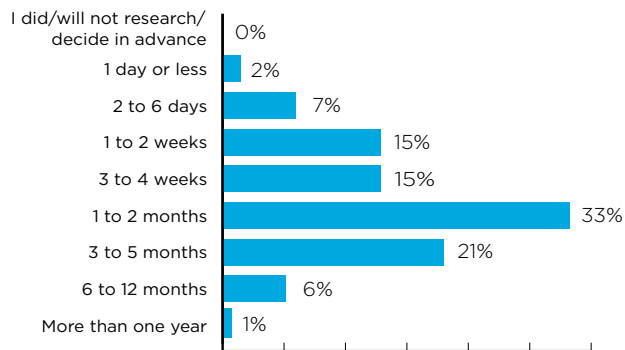
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	51%
Energetic	51%
Open-minded	49%
Creative	44%
Optimistic	35%

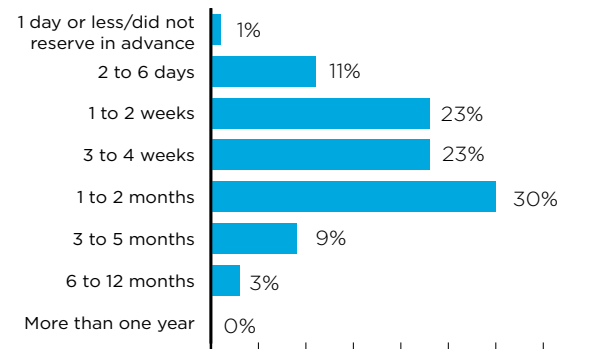
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: China Intercontinental travelers (N=1,002) Source: Brand USA Custom Study

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. Base: China Intercontinental travelers (N=1,002) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	64%
Personal recommendations from family and friends	55%
Personal advice from travel professionals/travel agents	47%
Websites/applications via tablet	42%
Websites or applications via mobile phone	36%

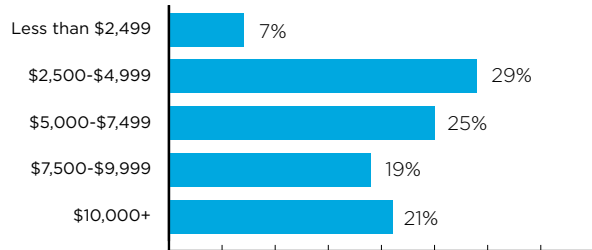
Countries travelers from China would most like to visit



Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: China Intercontinental travelers (N=1,002) Source: Brand USA Custom Study

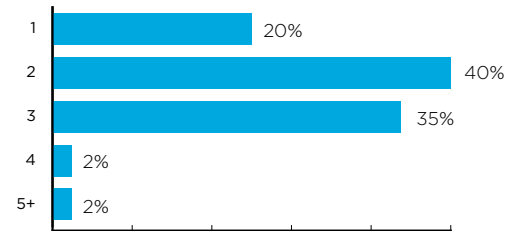
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$7,486	\$6,496



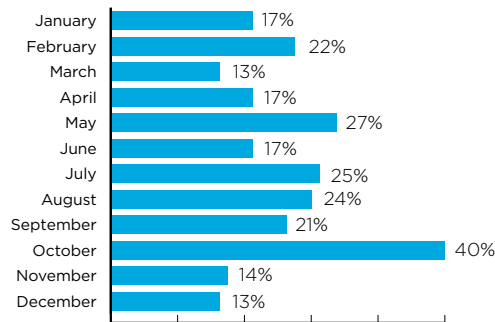
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: China Intercontinental travelers (N=1,002) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion CNY to USD=0.1624)

Expected Travel Party Size of Next Intercontinental Trip



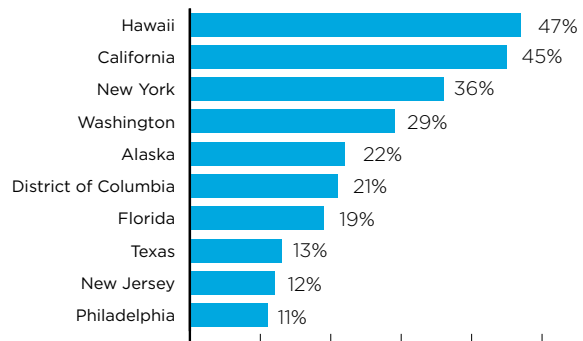
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: China Intercontinental travelers (N=1,002) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



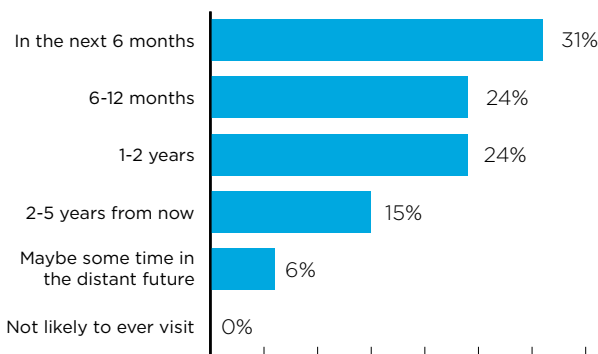
Question: During what month(s) did you take your N holiday(s)? Base: China Intercontinental travelers (N=1,002) Source: Brand USA Custom Study

Destination Interest - Top 10 States



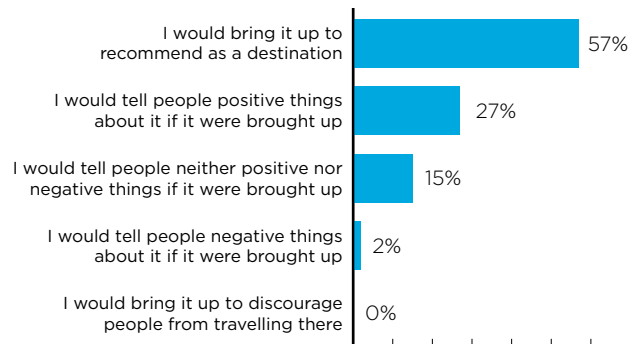
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: China Intercontinental travelers with interest in visiting the United States (N=997) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: China Intercontinental travelers (N=1,002) Source: Brand USA Custom Study

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? Base: China Intercontinental travelers (N=1,002) Note: Totals may not add up to 100% due to rounding Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Local Lifestyle	63%
Cultural Historical Attractions	56%
Beaches/Seaside Attractions	40%
Ecotourism and Nature	36%
Urban Attractions/Nightlife	36%

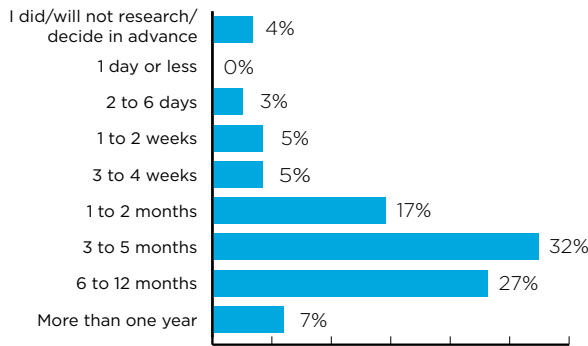
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	54%
Adventurous	33%
Forward-thinking	30%
Open-minded	28%
Trendy	26%

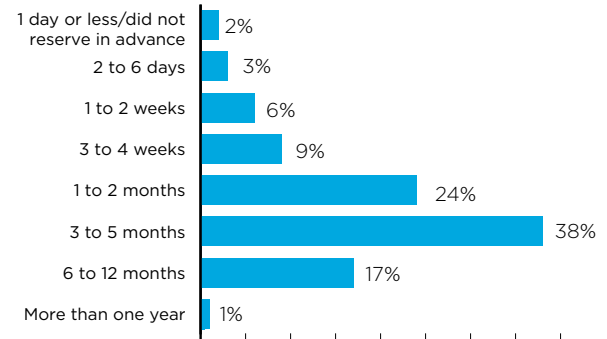
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: France Intercontinental travelers (N=1,015) Source: Brand USA Custom Study

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. Base: France Intercontinental travelers (N=1,015) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last International Trip

Channels	% Selected
Websites via computer or laptop	64%
Information in printed travel guidebooks	37%
Personal recommendations from friends/family	36%
Websites/applications via tablet	27%
Personal advice from travel professionals/travel agents	26%

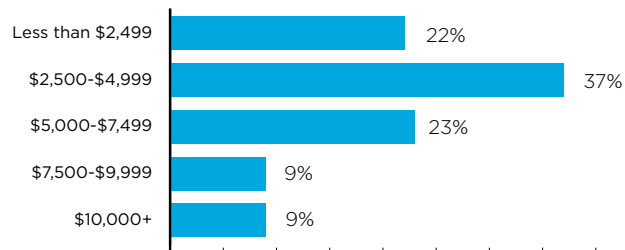
Countries travelers from France would most like to visit



Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: France Intercontinental travelers (N=1,015) Source: Brand USA Custom Study

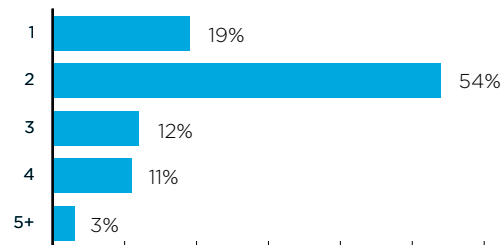
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$5,150	\$4,009



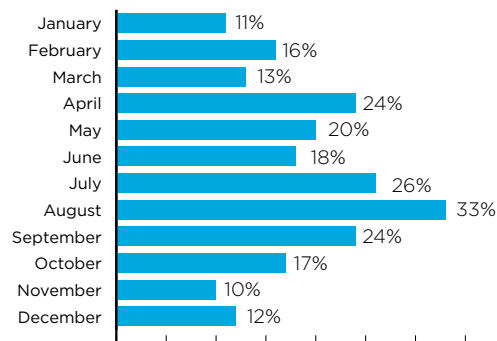
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: France Intercontinental travelers (N=1,015) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion EUR to USD=1.336)

Expected Travel Party Size of Next Intercontinental Trip



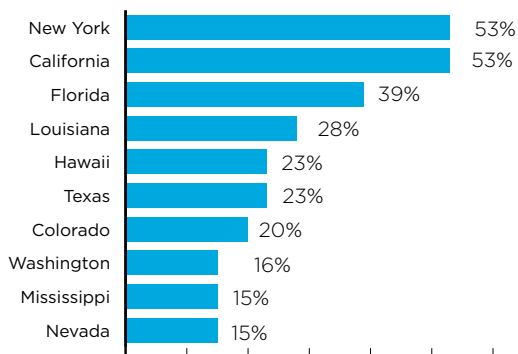
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: France Intercontinental travelers (N=1,015) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



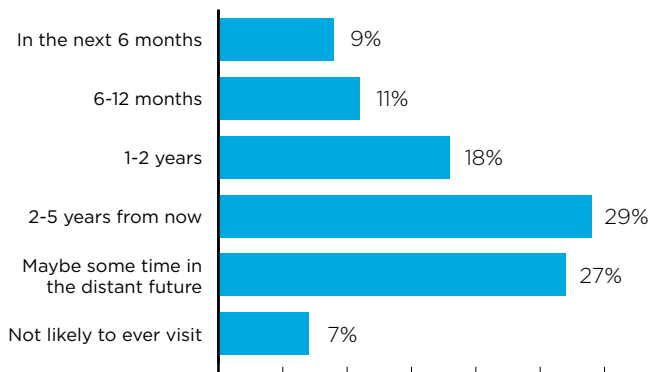
Question: During what month(s) did you take your N holiday(s)? Base: France Intercontinental travelers (N=1,015) Source: Brand USA Custom Study

Destination Interest - Top 10 States



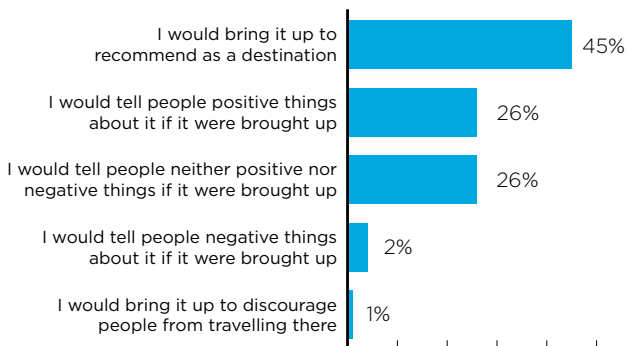
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: France Intercontinental travelers with interest in visiting the United States (N=948) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: France Intercontinental travelers (N=1,015) Source: Brand USA Custom Study

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? Base: France Intercontinental travelers (N=1,018) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	42%
Shopping	40%
Dining/Gastronomy	38%
Ecotourism and Nature	35%
Urban Attractions/Nightlife	34%

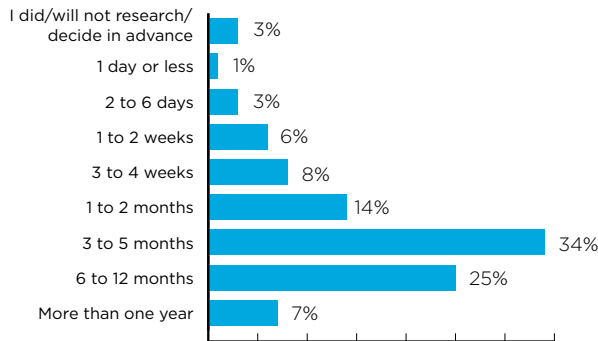
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	61%
Adventurous	47%
Forward-thinking	37%
Trendy	34%
Energetic	33%

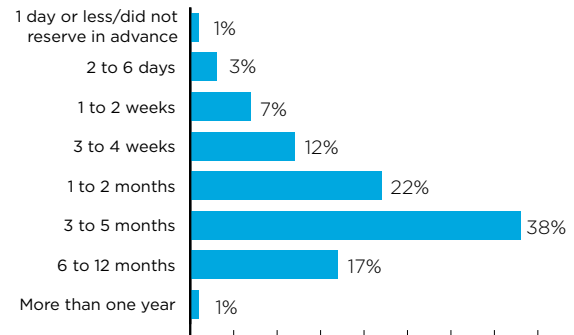
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Germany Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

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. Base: Germany Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	60%
Personal recommendations from family and friends	45%
Information in printed travel guidebooks	37%
Personal advice from travel professionals/travel agents	27%
Printed publications, articles or brochures	21%

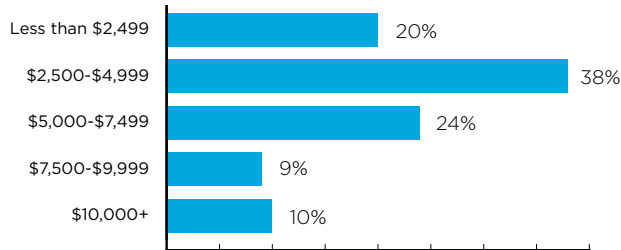
Countries travelers from Germany would most like to visit



Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Germany Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

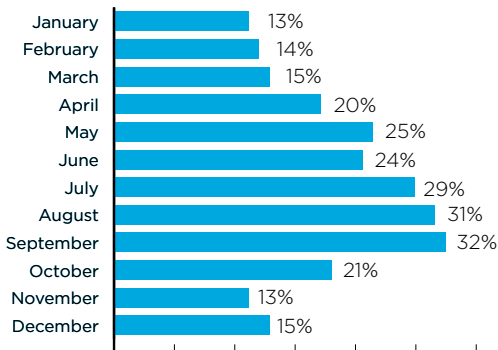
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$5,407	\$4,410



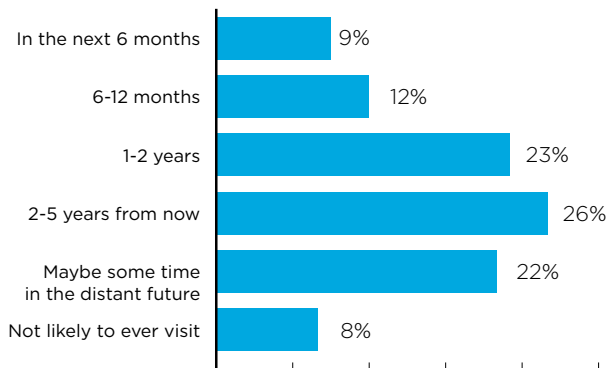
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Germany Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion EUR to USD=1.336)

Months Traveled (April 2012 - April 2014)



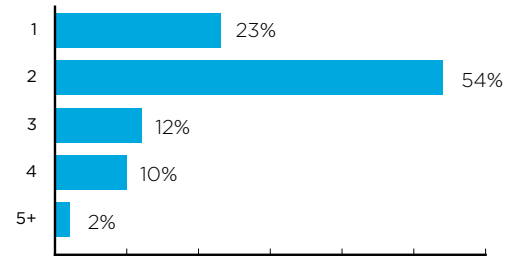
Question: During what month(s) did you take your N holiday(s)? Base: Germany Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

Likelihood of Travel to USA



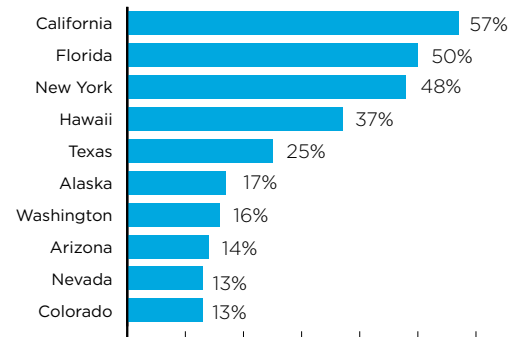
Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Germany Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

Expected Travel Party Size of Next Intercontinental Trip



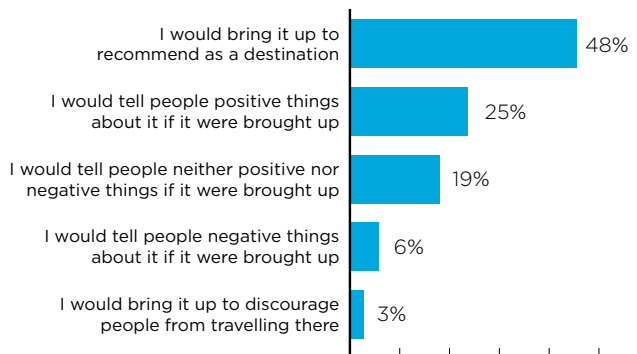
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Germany Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Destination Interest - Top 10 States



Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Germany Intercontinental travelers with interest in visiting the United States (N=928) Source: Brand USA Custom Study

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? Base: Germany Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Beaches/Seaside Attractions	60%
Shopping	58%
Theme Parks	47%
Local Lifestyle	47%
Cultural Historical Attractions	46%

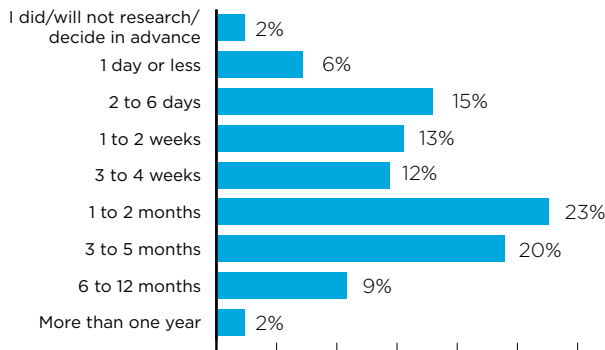
Top 5 Strongest Impressions of the USA

Impression	% Selected
Friendly	45%
Open-minded	44%
Energetic	39%
Adventurous	37%
Creative	37%

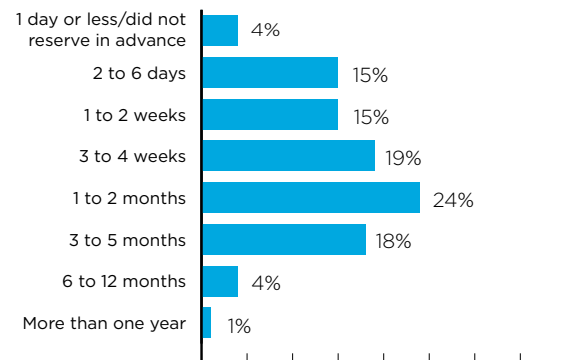
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: India Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

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. Base: India Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	56%
Personal recommendations from family and friends	44%
Personal advice from travel professionals/travel agents	42%
Websites/applications via tablet	40%
Information in printed travel guidebooks	37%

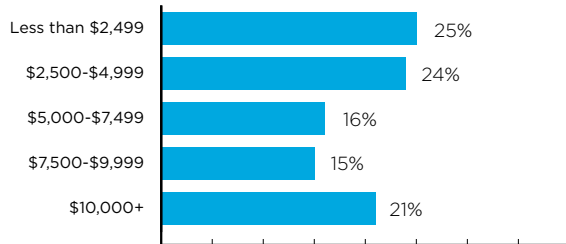
Countries travelers from India would most like to visit



Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: India Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

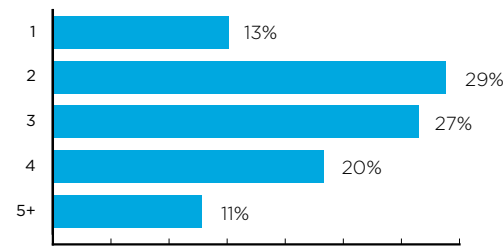
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$7,013	\$5,395



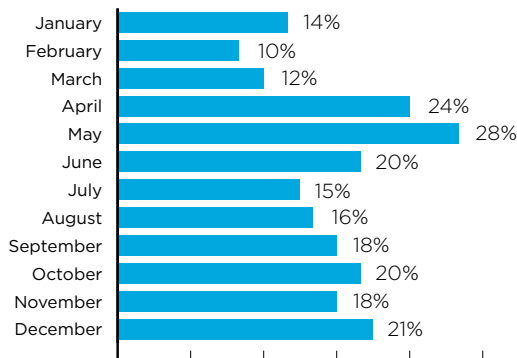
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: India Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion INR to USD=.0166)

Expected Travel Party Size of Next Intercontinental Trip



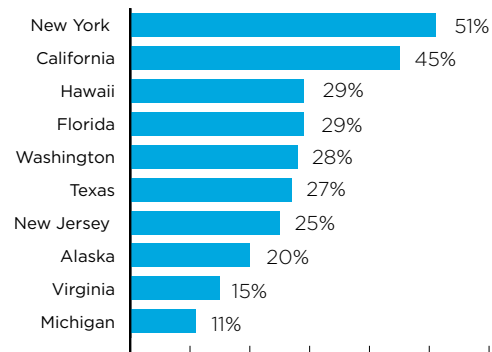
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: India Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



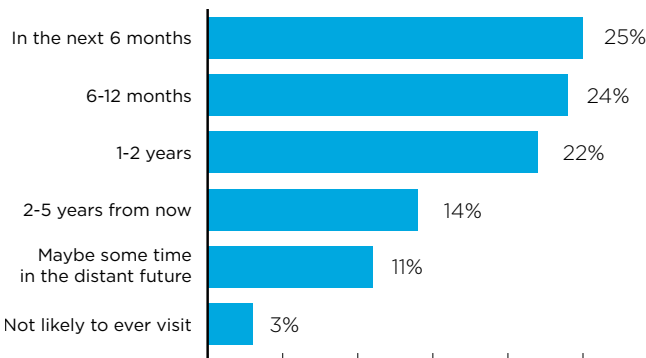
Question: During what month(s) did you take your N holiday(s)? Base: India Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

Destination Interest - Top 10 States



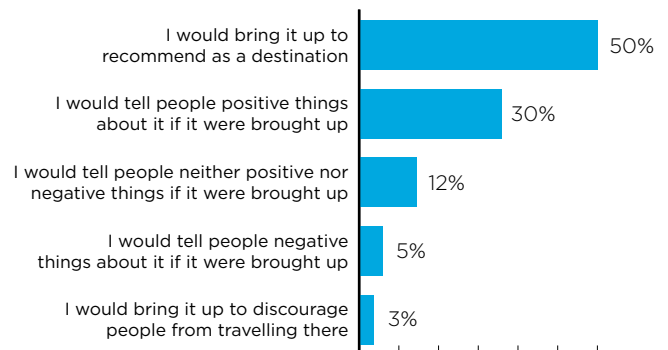
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: India Intercontinental travelers with interest in visiting the United States (N=973) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: India Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

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? Base: India Intercontinental travelers (N=1,006) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Dining/Gastronomy	59%
Cultural Historical Attractions	57%
Shopping	38%
Local Lifestyle	30%
Beaches/Seaside Attractions	26%

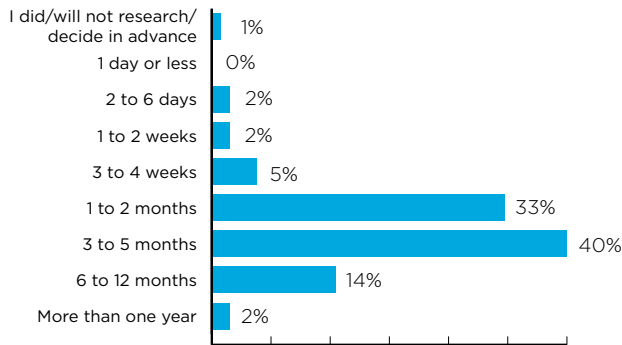
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	45%
Energetic	44%
Friendly	31%
Optimistic	23%
Open-minded	22%

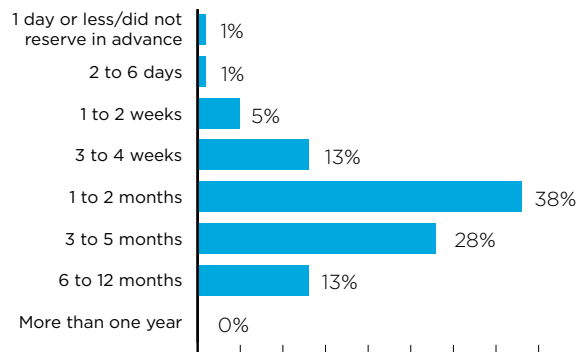
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Japan Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

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 Base: Japan Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	69%
Information in printed travel guidebooks	42%
Print publications, articles and brochures	33%
Personal recommendations from friends/family	24%
Websites/applications via tablet	19%

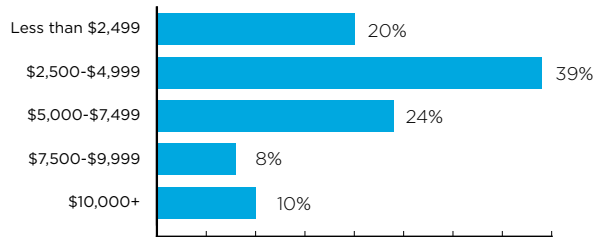
Countries travelers from Japan would most like to visit



Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Japan Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

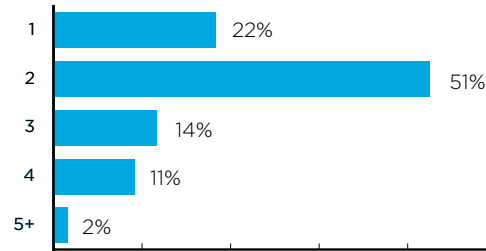
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$5,035	\$4,000



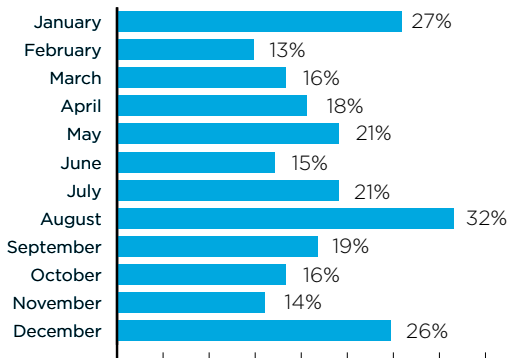
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Japan Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion JPY to USD=.010)

Expected Travel Party Size of Next Intercontinental Trip



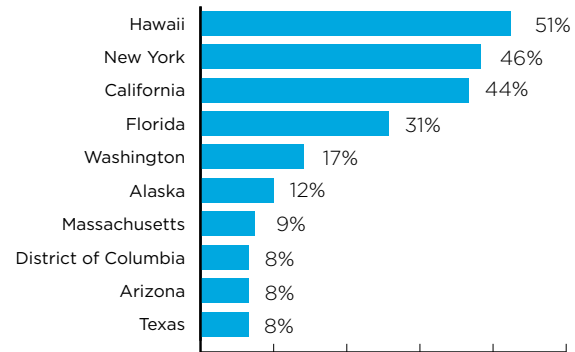
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Japan Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



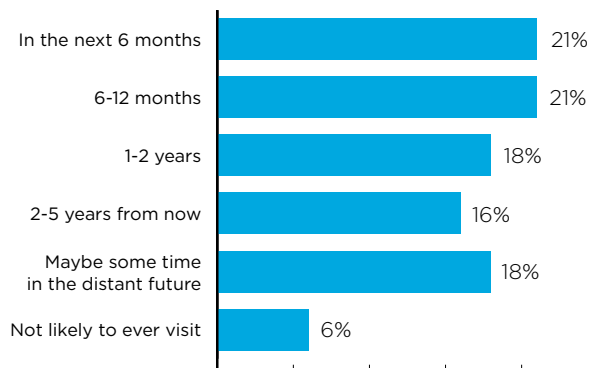
Question: During what month(s) did you take your N holiday(s)? Base: Japan Intercontinental travelers (N=1,036) Source: Brand USA Custom Study

Destination Interest - Top 10 States



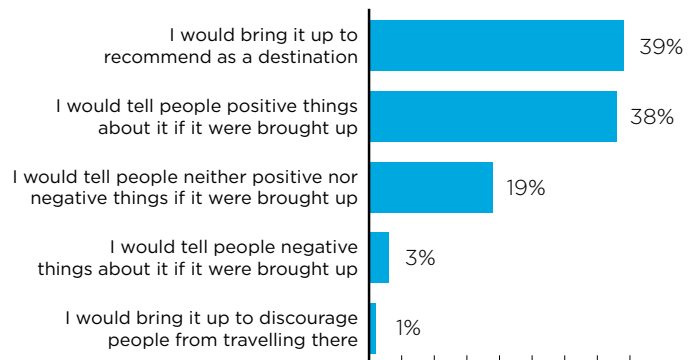
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Japan Intercontinental travelers with interest in visiting the United States (N=944) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Japan Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

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? Base: Japan Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	61%
Dining/Gastronomy	52%
Urban Attractions/Nightlife	51%
Shopping	48%
Beaches/Seaside Attractions	44%

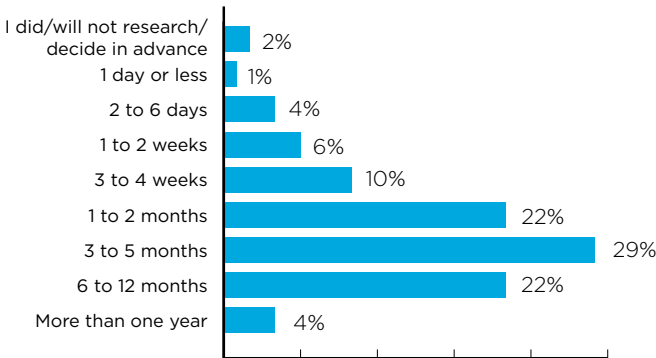
Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	48%
Trendy	42%
Down-to-earth	39%
Open-minded	39%
Forward-thinking	34%

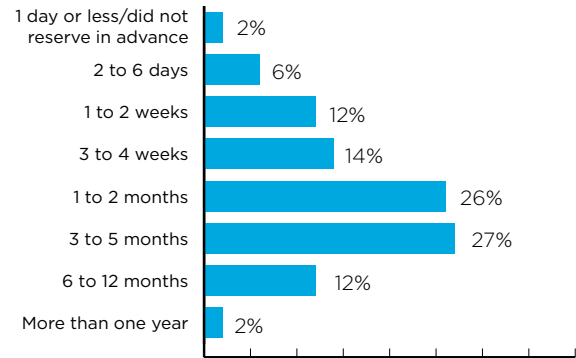
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Mexico Intercontinental travelers (N=1,009) Source: Brand USA Custom Study

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. Base: Mexico Intercontinental travelers (N=1,009) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

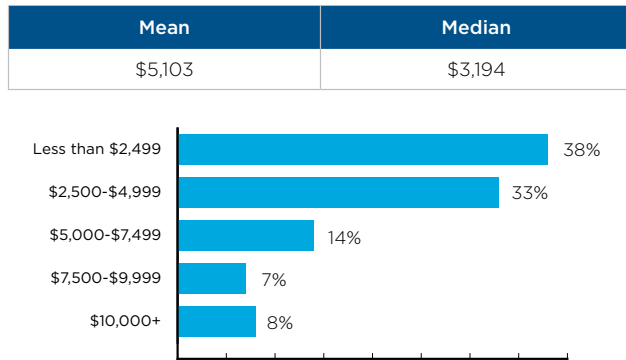
Channels	% Selected
Websites via computer or laptop	63%
Personal recommendations from friends/family	44%
Websites/applications via tablet	34%
Personal advice from travel professionals/travel agents	30%
Websites or applications via mobile phone	29%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Mexico Intercontinental travelers (N=1,009) Source: Brand USA Custom Study

Countries travelers from Mexico would most like to visit

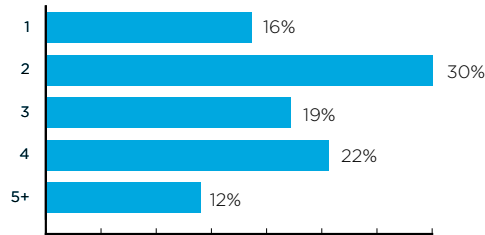


Expected Household Travel Spend for Next Intercontinental Trip



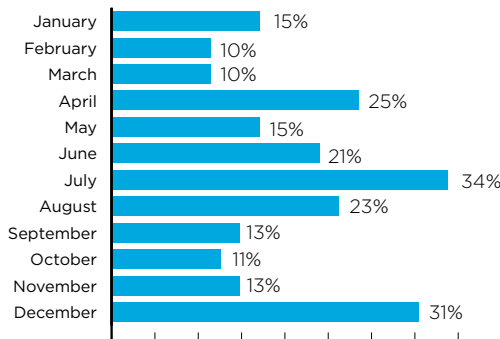
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Mexico Intercontinental travelers (N=1,009) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion MXN to USD=.078)

Expected Travel Party Size of Next Intercontinental Trip



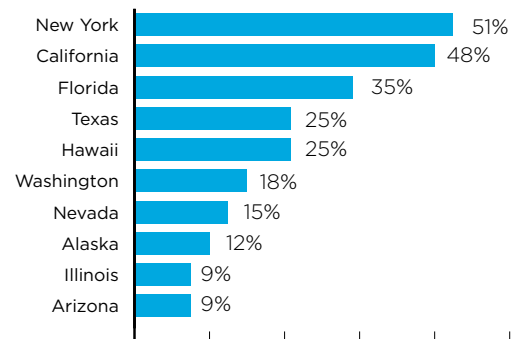
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Mexico Intercontinental travelers (N=1,009) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



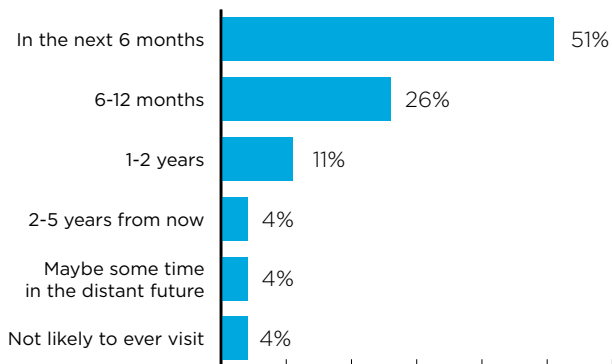
Question: During what month(s) did you take your N holiday(s)? Base: Mexico Intercontinental travelers (N=1,009) Source: Brand USA Custom Study

Destination Interest - Top 10 States



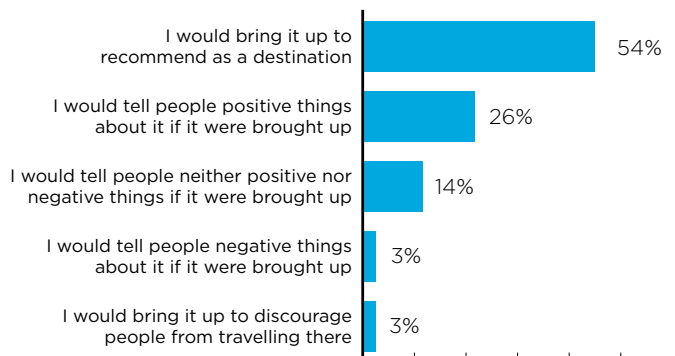
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Mexico Intercontinental travelers with interest in visiting the United States (N=970) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Mexico Intercontinental travelers (N=1,009) Source: Brand USA Custom Study

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? Base: Mexico Intercontinental travelers (N=1,009) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Beaches/Seaside Attractions	70%
Cultural Historical Attractions	60%
Local Lifestyle	48%
Ecotourism and Nature	48%
Sport and Adventure Activities	47%

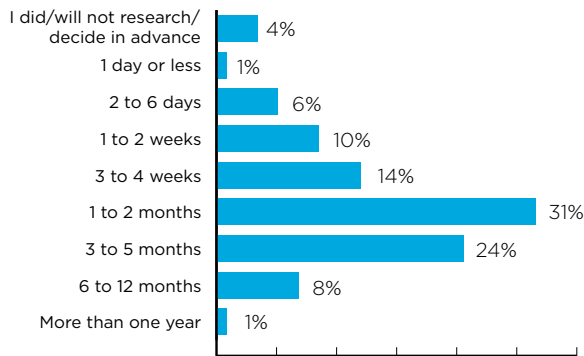
Top 5 Strongest Impressions of the USA

Impression	% Selected
Arrogant	43%
Diverse	41%
Energetic	36%
Forward-thinking	29%
Fresh	21%

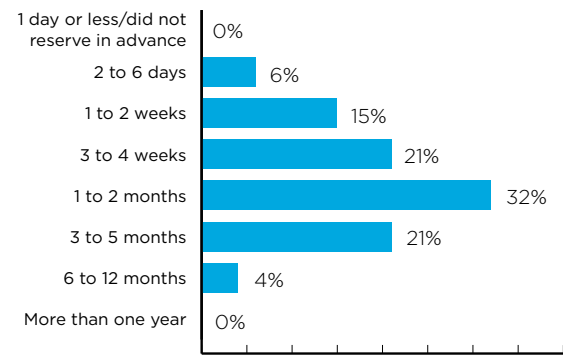
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Russia Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

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. Base: Russia Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	74%
Personal recommendations from friends/family	57%
Personal advice from travel professionals/travel agents	41%
Calls/visits to city/state destination travel bureaus/tourist offices	34%
Websites/applications via tablet	32%

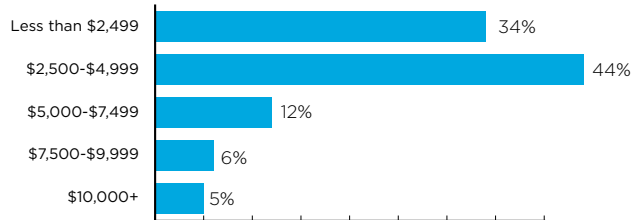
Countries travelers from Russia would most like to visit



Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Russia Intercontinental travelers (N=1,007) Source: Brand USA Custom Study.

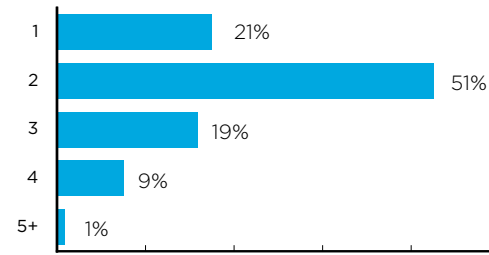
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$4,116	\$3,366



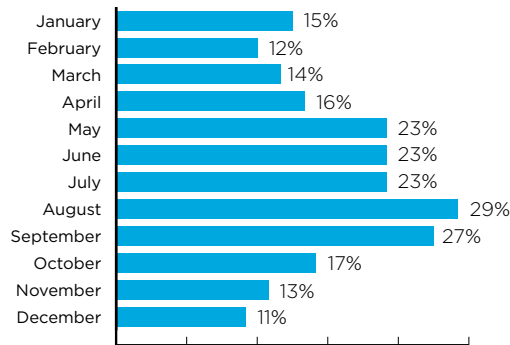
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Russia Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion RUB to USD=.030)

Expected Travel Party Size of Next Intercontinental Trip



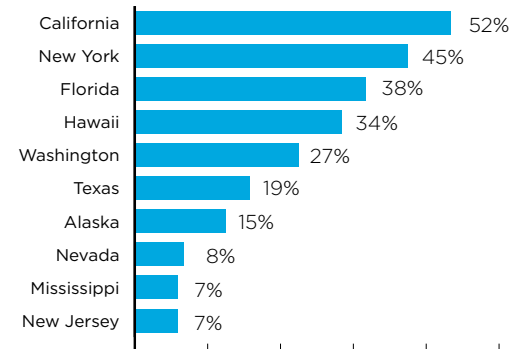
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Russia Intercontinental travelers (N=1,007) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



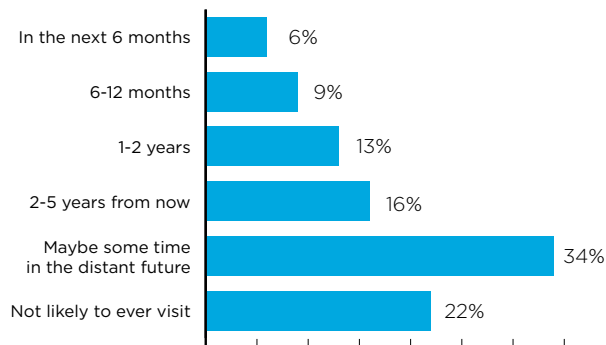
Question: During what month(s) did you take your N holiday(s)? Base: Russia Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

Destination Interest - Top 10 States



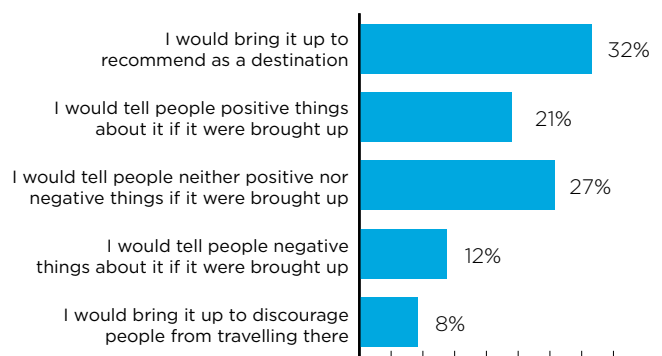
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Russia Intercontinental travelers with interest in visiting the United States (N=1,007) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Russia Intercontinental travelers (N=1,007) Source: Brand USA Custom Study

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? Base: Russia Intercontinental travelers (N=1,015) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



South Korea

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions	62%
Beaches/Seaside Attractions	51%
Ecotourism/Nature	49%
Urban Attractions/Nightlife	47%
Local Lifestyle	41%

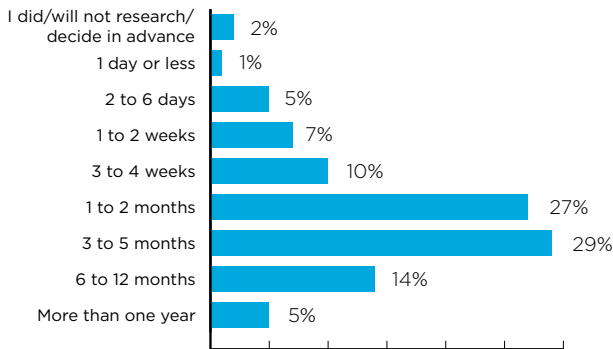
Top 5 Strongest Impressions of the USA

Impression	% Selected
Open-minded	62%
Diverse	56%
Energetic	52%
Sophisticated	30%
Down-to-earth	27%

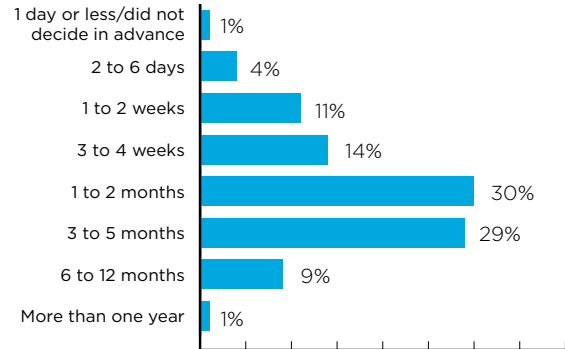
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Korea Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

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. Base: Korea Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

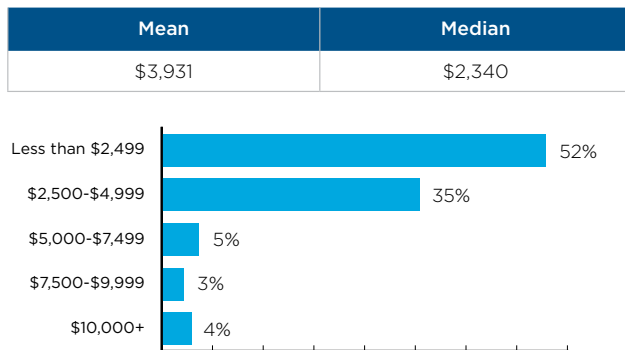
Channels	% Selected
Websites via computer or laptop	68%
Personal recommendations from friends/family	49%
Personal advice from travel professionals/travel agents	31%
Websites or applications via mobile phone	29%
Information in printed travel guidebooks	28%

Countries travelers from South Korea would most like to visit



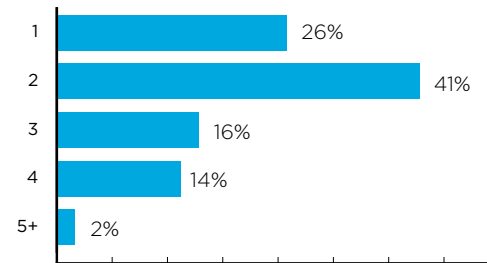
Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Korea Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

Expected Household Travel Spend for Next Intercontinental Trip



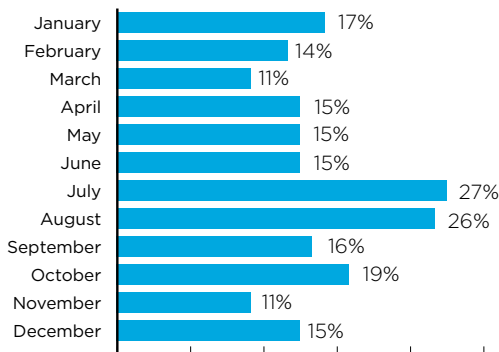
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Korea Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion KRW to USD=9)

Expected Travel Party Size of Next Intercontinental Trip



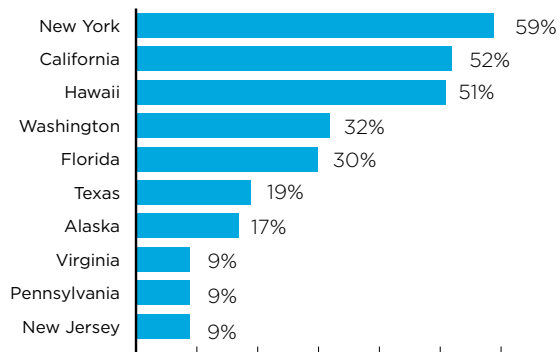
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Korea Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



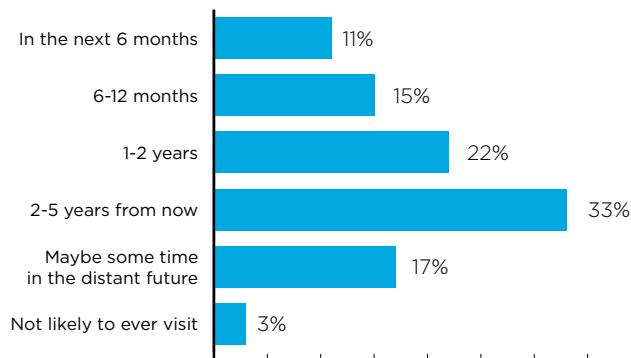
Question: During what month(s) did you take your N holiday(s)? Base: Korea Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

Destination Interest - Top 10 States



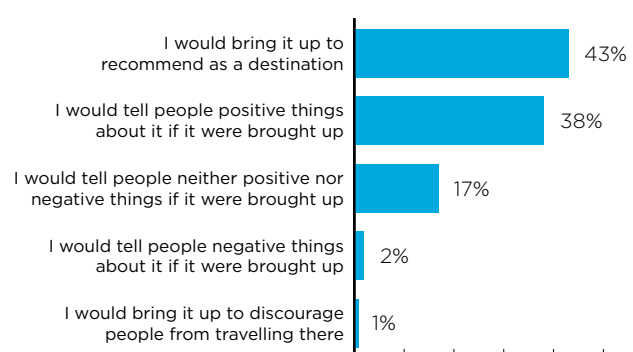
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: Korea Intercontinental travelers with interest in visiting the United States (N=986) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: Korea Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

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? Base: Korea Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study



United Kingdom

Top 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Local Lifestyle	46%
Cultural/Historical Attractions	46%
Beaches/Seaside Attractions	45%
Dining/Gastronomy	31%
Shopping	31%

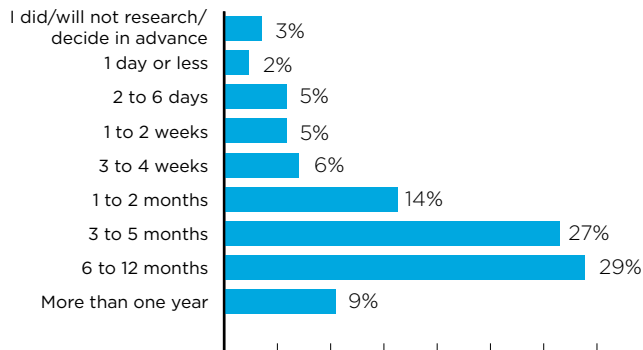
Top 5 Strongest Impressions of the USA

Impression	% Selected
Friendly	48%
Diverse	41%
Energetic	40%
Adventurous	38%
Open-minded	25%

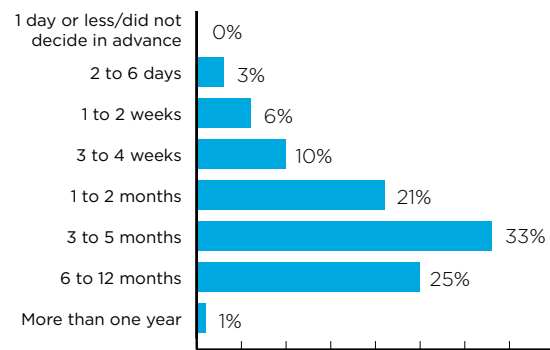
Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: U.K. Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

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. Base: U.K. Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	61%
Personal recommendations from friends/family	33%
Information in printed travel guidebooks	26%
Websites/applications via tablet	24%
Printed publications articles and brochures	21%

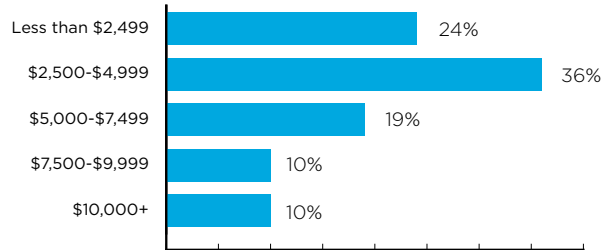
Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: U.K. Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

Countries travelers from the United Kingdom would most like to visit



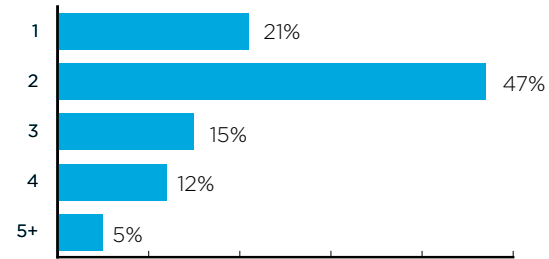
Expected Household Travel Spend for Next Intercontinental Trip

Mean	Median
\$5,256	\$4,274



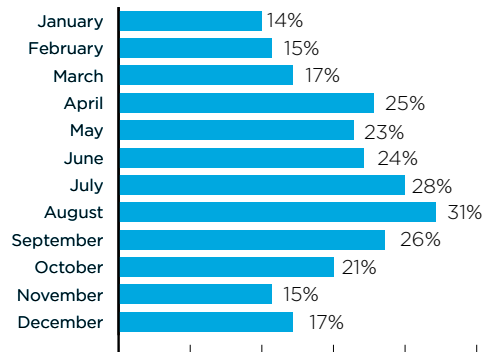
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: U.K. Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study (Conversion GBP to USD=1.583)

Expected Travel Party Size of Next Intercontinental Trip



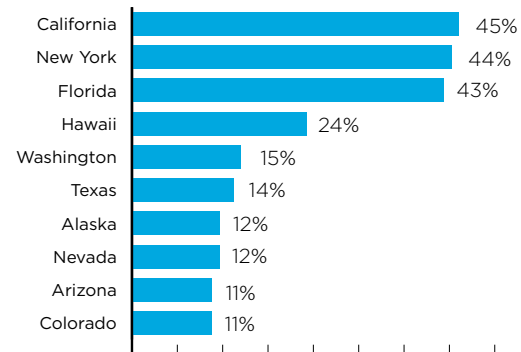
Question: How many people in your household will go on this trip? Please count yourself as 1. Base: U.K. Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

Months Traveled (April 2012 - April 2014)



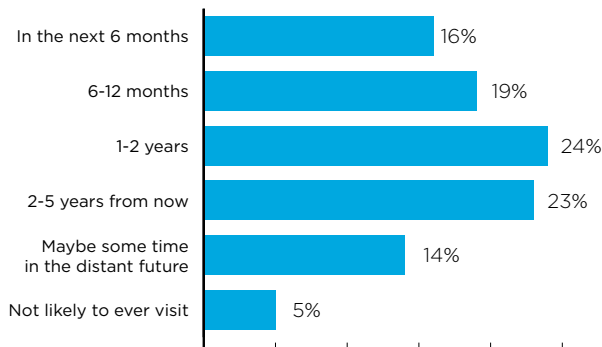
Question: During what month(s) did you take your N holiday(s)? Base: U.K. Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

Destination Interest - Top 10 States



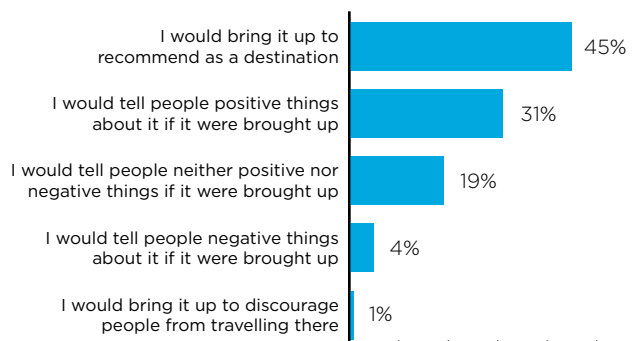
Question: You indicated in a previous question that you have interest in visiting the US sometime in the future. Which US state(s) are you interested in visiting? Base: U.K. Intercontinental travelers with interest in visiting the United States (N=966) Source: Brand USA Custom Study

Likelihood of Travel to USA



Question: When, if ever, are you likely to visit the following countries? United States of America. Base: U.K. Intercontinental travelers (N=1,013) Source: Brand USA Custom Study

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? Base: U.K. Intercontinental travelers (N=1,013) Note: Totals may not add up to 100% due to rounding. Source: Brand USA Custom Study

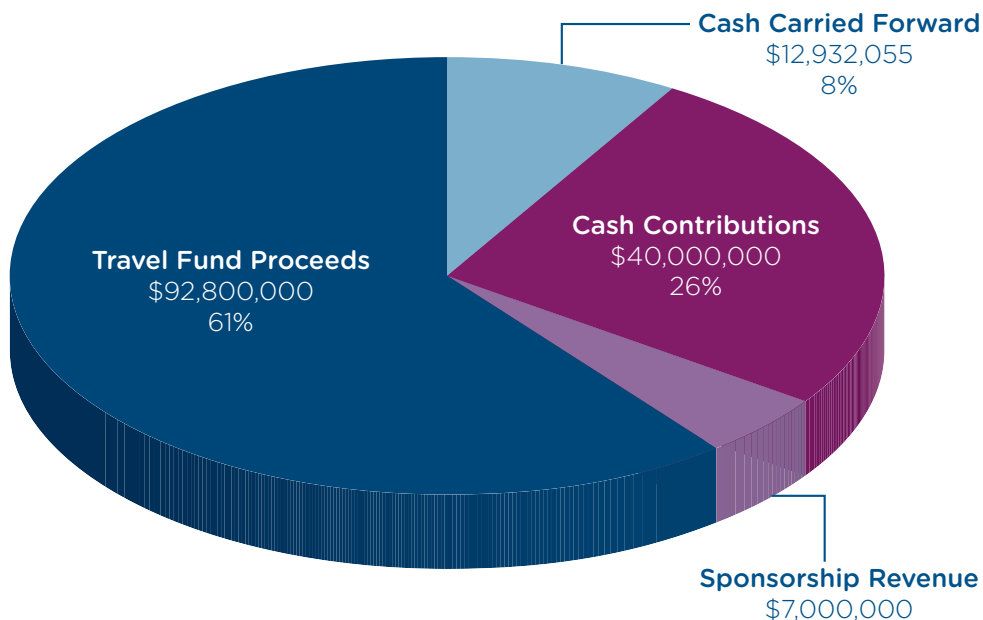


FY15 BUDGET

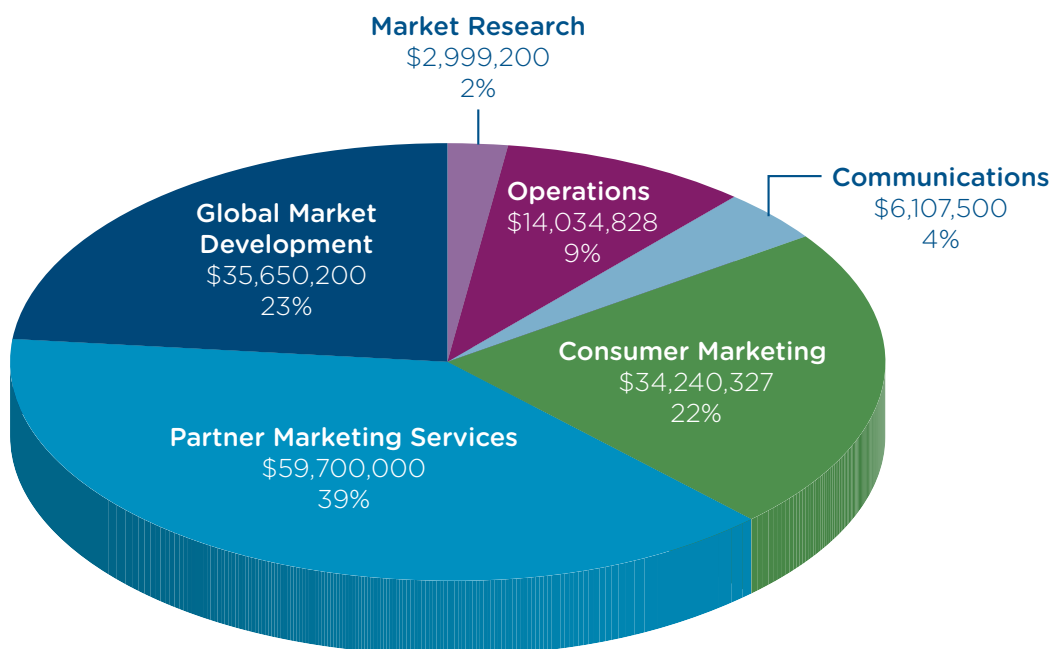


Budget

REVENUES \$152,732,055



EXPENSES \$152,732,055





THE BRAND USA TEAM



Staff

Christopher L. Thompson

President & Chief Executive Officer

Operations

Donald Richardson
Chief Financial Officer

Stanley Mattos
Vice President

Jake Conte
Director and In-House Counsel

Narciso Torrente
Director, Finance

Blanca Romero
Office Manager

Brian Watkins
Manager, Information Technology

Odette Alvarez
ESTA Coordinator and Payroll Specialist

Marc Brooks
Legal Assistant

Ericka Gibson
Accounts Payable Coordinator

Maria Kafarakis
Marketing Billing Coordinator

James Velasquez
Compliance Coordinator

Robyn Jordan
Executive Assistant to the CFO

Rachael Pinguelo
Receptionist

Communications and Public Policy

Anne Madison
Chief Communications Officer

Camila Clark
Director, Marketing Communications

Michael Fullerton
Director, Public Affairs

Aaron Wodin-Schwartz
Director, Public Policy

Jason Aul
Manager, Public Policy

Bridgett Krider
Project Manager, Marketing
Communications

Tiwana Perry
Project Manager, Communications
and Events

Allison Schneider
Project Manager, Communications
and Events

Judie Macalino
Executive Assistant to the CEO and CCO

Marketing

Thomas Garzilli
Senior Vice President,
Global Partner Marketing

Amir Eylon
Vice President, Partner Engagement

Karyn Gruenberg
Vice President, Marketing and
Partner Programs

Carroll Rheem
Vice President, Research and Analytics

Sarah Dickson
Director, Partnership Development

Roberta Hatchett
Director, Advertising and Media

Renee Mason
Director, Partner Programs

Mark Lapidus
Director, Digital

Jeanne Liu
Director, Consumer Research

Patricia McNally
Director, Partner Services

Cassady Bailey
Manager, Partner Services

Devon Dow
Manager, Partner Programs

Philip Joseph
Regional Sales Manager (Northeast)

James Namude
Manager, Partner Advertising and
Sponsorships

Jennifer Ross
Manager, Partner Programs

Talia Salem
Manager, Social Media

Dianne Turner
Regional Sales Manager (Southeast)

Carol Billingsley
Coordinator, Partner Programs

Bret Peterson
Analyst, Digital Marketing

Daniel Brunner
Partner Services Representative

Luke Hening
In-Kind Coordinator

Michael Parra
Partner Services Representative

Brian Screptock
Partner Services Representative

Alexis Adelson
Executive Assistant to the SVP, Global
Partner Marketing

Lauren Williams
Executive Assistant, Partner Engagement

Global Market Development

Alfredo Gonzalez
Senior Vice President
Global Market Development

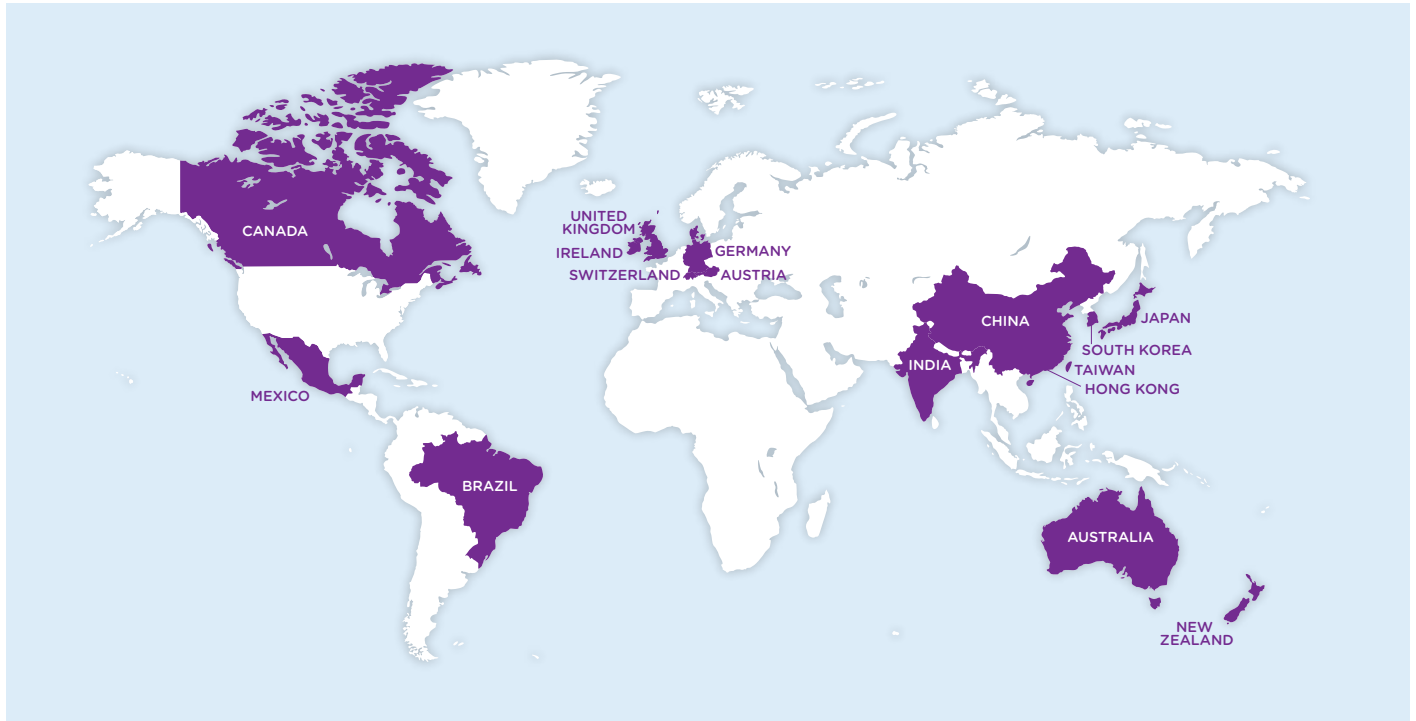
Jay Gray
Vice President, Global Market Development

Anna Klapper
Manager, Global Development

Suzana Shepard
Manager, Global Development

Nina Toth
Executive Assistant to the SVP, Global
Market Development

International Representation Offices



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Managing Director

Ollie Philpot
Director, Australia and New Zealand

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Wayne Mitcham
Account Manager

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Account Manager, Trade

Carolina Cordioli
Account Director

Karen Almeida
Account Manager, Public Relations

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Travel Trade Partnerships

Sana Keller
Director, Media & Public Relations

Marissa Maheu
Administration

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Jenny Guan
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Sunday Wang
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Spring Zheng
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Anita Jia
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AND SWITZERLAND

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Rita Hille
Director of Events, Promotions and Shows

Gabi Romberg
Director of Public Relations

Albert Jennings
Director of Research and Social Media

Christian Zerbian
Country Manager

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ConnectWorldwide BRANDSTORY
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Sam Chen
Manager, Trade Relations

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2nd Floor, Sishan House, 119, Shahpur Jat
New Delhi -110049, India

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Sunil Puri
Executive Director

Namrata Bansal
Account Director, Public Relations

Aneeta Shah
Account Manager

Anindita Lal
Marketing Assistant

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AVIAREPS Marketing Garden
International Place
26-3 Sanei-cho, Shinjuku
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Yoichi Hayase
Japan & Asia Strategy Director

Mitsuteru Hada
Travel Trade Director

Reiko Mizutani
Public Relations/Promotions Director

Mika White
Public Relations/Promotions Manager

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CENTRAL AMERICA

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Delegación Miguel Hidalgo
México D.F., Mexico 11590

Benjamin Diaz
President

Adriana de la Torre
Vice President

Marcela Carmona
Account Manager, Trade

Gloria Herrera
Account Manager, Public Relations

Roman Diaz
Webmaster & Multimedia Producer/
Digital Service Executive

Vanessa Sanchez
Administrative Manager

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Emily Kim
Marketing Director

Irene Lee
Public Relations Director

Gina Choi
Marketing & Public Relations
Account Manager

Justin Jung
Marketing & Public Relations
Account Executive

Ellie Shong
Marketing Assistant

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Shin Kong Manhattan Building
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Taipei 11049, Taiwan

Sophia Guan
Manager

UNITED KINGDOM AND IRELAND

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Guy Chambers
Managing Director

Jonah Whitaker
Strategy Director

Gerry Boyle
Travel Trade Director

Arabella Arthy
Senior Account Manager

Sarah Barnett
Public Relations & Communications
Director

Jennifer Byles
Public Relations Junior Account Manager

Jennifer Guiver
Events Coordinator

Board of Directors

Brand USA is governed by an 11-member Board of Directors appointed by the U.S. Secretary of Commerce in consultation with the Secretary of State and the Secretary of Homeland Security. Each brings expertise in diverse regions and the sectors of the travel industry designated by the Travel Promotion Act. As of May 15, 2014, the following business leaders serve on the board of directors of Brand USA:

Daniel Halpern

Chair of the Board

President & CEO, Jackmont Hospitality, Inc.

Member: Finance Committee

Member: Governance and Nominating Committee

Tom Klein

Vice Chair

President & CEO, Sabre Holdings

Chair: Nominating & Governance Committee

Member: Finance Committee

Barbara J. Richardson

Vice Chair

Chief of Staff, Washington Metropolitan

Area Transit Authority (WMATA)

Chair: Marketing Committee

Member: Finance Committee

Arne Sorenson

Treasurer

President & CEO, Marriott International, Inc.

Chair: Finance Committee

Andrew Greenfield

Secretary

Partner, Fragomen, Del Rey, Bernsen and

Loewy, LLP

Member: Finance Committee

Member: Governance and Nominating Committee

Caroline Beteta

President and CEO, Visit California

Member: Marketing Committee

George Fertitta

CEO, Bloomberg Associates

Member: Marketing Committee

Randy A. Garfield

**Retired/Former Executive Vice President,*

Worldwide Sales & Travel Operations,

Disney Destinations, & President, Walt

Disney Travel Co.

Member: Audit Committee

Member: Marketing Committee

Mark Schwab

CEO, Star Alliance Services GmbH

Member: Audit Committee

Diane Shober

State Tourism Director, Wyoming Office

of Tourism

Member: Marketing Committee

Chef Roy Yamaguchi

Owner & Founder, Roy's Restaurant

Chair: Audit Committee



OUR PARTNERS



Founding

(recognized in perpetuity for contributions of \$1 million or more made during Brand USA's founding year)

Best Western International, Inc.
 Disney Parks and Resorts Worldwide
 Enterprise Holdings, LLC
 Hilton Worldwide
 Illinois Office of Tourism
 (Discover Illinois)

Las Vegas Convention and Visitors
 Authority (Visit Las Vegas)
 Marriott International, Inc.
 Massachusetts Office of Travel
 and Tourism
 NYC and Company

U.S. Travel Association
 Universal Studios Orlando
 Visit California
 Visit Florida
 Visit Orlando

Diamond *(contributions of \$1 million and higher)*

Air Berlin
 Air Canada
 APN NZ Media
 Asiana Airline Inflight TRIAD IBS
 BBC Worldwide
 Best Western International, Inc.
 British Airways
 BS Fuji
 California Travel and Tourism
 Commission (Visit California)
 Choose Chicago
 Disney
 Enterprise Holdings, LLC
 ESPN
 Expedia
 Grupo Companhia
 Hilton Worldwide
 Illinois Office of Tourism
 (Discover Illinois)

Las Vegas Convention and Visitors
 Authority (Visit Las Vegas)
 Los Angeles Tourism and Convention
 Board (Discover Los Angeles; LA Inc.)
 Louisiana Office of Tourism
 MacGillivray Freeman Films
 Mainichi Newspaper Co. Ltd.
 Marriott International, Inc.
 Massachusetts Office of Travel
 and Tourism
 National Geographic
 NBC Universal (Universal Orlando)
 NYC and Company
 Orbitz Worldwide
 Osceola County DTD/Kissimmee (Visit
 Kissimmee; Experience Kissimmee)
 Porter Airlines
 Scripps Networks International Limited
 SeaWorld Parks and Entertainment, Inc.

STA Travel
 State of Texas, Office of the Governor,
 Economic Development and Tourism
 (Texas Tourism)
 The Guardian
 The Telegraph
 Thomas Cook
 Travel Brands
 Travel Zoo
 TripAdvisor
 TTG Media
 United Airlines
 Universal City Development Partners
 Ltd. (NBC Universal Hollywood)
 US Travel Association
 Virgin Holidays
 Visit Florida
 Visit Orlando

Platinum *(contributions of \$500,000 to \$999,999)*

Arizona Office of Tourism
 Brazil Travel News USA
 Communication
 Caesars Entertainment
 Como Street Travel
 ESI Media (The Independent;
 The Evening Standard)
 Greater Miami Convention
 and Visitors Bureau

Hankyu Travel International Co., Ltd.
 Ignite Travel Group
 Myrtle Beach Area Convention and
 Visitors Bureau (Visit Myrtle Beach)
 National Football League
 National Parks Promotion Council
 Ocean USA
 Oregon Tourism Commission
 (Travel Oregon)

Preferred Hotel Group
 SAG/AFTRA (Screen Actors Guild)
 Seattle Convention and Visitors Bureau
 Starwood Hotels and Resorts Worldwide
 Travel Portland
 Washington Convention and Visitors
 Bureau (Destination DC)
 West Jet

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

Buffalo Niagara Convention and Visitors Bureau (Visit Buffalo Niagara)	Lee County Convention and Visitors Bureau (The Beaches of Fort Myers and Sanibel)	Qantas Airways
Cirque du Soleil	LimeTree Media	Readers Digest
CityPass, Inc.	Michigan Economic Development Corporation (Pure Michigan; Travel Michigan)	San Antonio Convention and Visitors Bureau (Visit San Antonio)
Conde Nast Traveller	MOAC Mall Holdings LLC (Mall of America)	Scenic Tours
Deutsche Lufthansa AG	Philadelphia Convention and Visitors Bureau (PHL CVB)	Seven Network
Diamond Resorts International	PhoCusWright	Smart Destinations, Inc.
FTI Touristik		South Carolina Dept. of Parks, Recreation and Tourism
Georgia Department of Economic Development (Explore Georgia)		South Hall Travel Limited
International Media Organizations (IMO)		Travelocity
		Where Are You Now

Silver *(contributions of \$100,000 to \$249,999)*

American Express International	Greater Philadelphia Tourism Marketing Corporation (Visit Philly; GPTMC)	Outrigger Hotels and Resorts
American Sky	Guam Visitors Bureau	PM Publishing Solutions
Auckland International Airport	Hawaii Tourism Authority	Qatar Airways
Austin Convention and Visitors Bureau	Hawaiian Airlines	ROAD ABC Media
Australian Pacific Touring (The APT Group)	Idaho Department of Commerce (Visit Idaho)	Routes Online
Balfour Global LLP	Japan Airlines Co. Inc. (JAL)	Sabre Holdings
Baxter Travel Media	Las Vegas Sands Corp.	San Francisco Travel Association
Bay Area Houston Convention and Visitors Bureau (Houston Convention and Visitors Bureau)	Meier's Weltreisen	Ski Vermont
Black Diamond	Memphis Convention and Visitors Bureau	Societa Geografica Italiana
Capital Region USA	Miles Media	South Dakota Department of Tourism (Travel South Dakota)
Carlson Hotels	Minnesota Convention and Visitors Bureau (Explore Minnesota)	Southern State Tourism Offices (Travel South USA)
Charleston Area Convention and Visitors Bureau (Explore Charleston)	Missouri Division of Tourism, Department of Economic Development	Tennessee Department of Tourist Development
Choice Hotels International	Montana Office of Tourism (Visit Montana)	Travel Market Insights
CISg (IT Services)	Myrtle Beach Golf Holiday	TravMedia
Cleverdis	Nevada Department of Tourism and Cultural Affairs (Travel Nevada)	Turistampa
DER Touristik GmbH and Co. KG	New Orleans Convention and Visitors Bureau	Turner Japan
Discover New England	New York State Department of Economic Development	U.S. Virgin Islands Department of Tourism
FVW Mediengruppe		USAirtours Ltd.
General Growth Services (General Growth Properties)		Utah Office of Tourism
Great Lakes USA		VOS Media Ltd.
Greater Fort Lauderdale Convention and Visitors Bureau		Wyoming Office of Tourism (Forever West)

Bronze *(contributions of \$10,000 to \$99,000)*

Air New Zealand	Dupage Convention and Visitor's Bureau (Discover Dupage; Illinois Consortium)	Jalpak Co., Ltd.
Alabama Tourism Department	Durango Area Tourism Office	Jetline Travel
Alton Regional Convention and Visitors Bureau (Visit Alton)	Embassy Suites Waikiki Beach Walk	JTB World Vacations
Amelia Island Convention and Visitors Bureau	Enfoque del Café	Kansas Department of Wildlife, Parks and Tourism
America Unlimited GmbH	ES Tour	Katten Muchin Rosenman, LLP
Amtrak	Experience Arlington	Kentucky Department of Travel and Tourism
Anaheim Orange County Visitor and Convention Bureau	Explorer Fernreisen GmbH and Co. KG	Kiawah Island Golf Resort
Andar de Viaje	Fairmont Hotels and Resorts	Kinki Nippon Tourist Co., Ltd.
Annapolis and Anne Arundel County Conference and Visitors Bureau (Visit Annapolis)	Federal Realty	KLM Royal Dutch Airlines (Finland)
Arkansas Parks and Tourism	FelCor Lodging Trust Inc.	Knecht Reisen AG
Asheville CVB (Explore Asheville)	Finger Lakes Regional Tourism Alliance	Knoxville Convention and Visitors Bureau (Visit Knoxville)
Ashford Hospitality Trust LP	Finger Lakes Visitors Connection (Visit Finger Lakes)	Kuoni Reisen AG
Aspen Snowmass	Flexible Trips	La Cita de las Americas
Atlanta Convention and Visitors Bureau	Flight Centre UK Limited	Lafayette Convention and Visitors Commission
Atlantic City Convention and Visitors Authority	Fort Worth Convention and Visitors Bureau	Lake Charles Convention and Visitors Bureau (Visit Lake Charles)
Aurora Area Convention and Visitors Bureau (Enjoy Aurora)	Gap Outlet	Lake County Illinois CVB (Visit Lake County)
Boise Convention and Visitors Bureau	Great River Road Illinois (Macomb)	Landmark Hotel Group
Branson Convention and Visitors Bureau	Great Rivers Country	LEDTV
Breckenridge Resort Chamber (GoBreck; Breckenridge Central Reservations)	Greater Phoenix Convention and Visitors Bureau (Visit Phoenix)	Let's Travel Magazine
Canusa Touristik GmbH and Co	H.I.S. Co., LTD.	Liftopia
Cape Cod Chamber of Commerce	Hanjin Travel Service Co., Ltd.	Little Rock
Chicago Northwest (Meet Chicago Northwest)	Harrisonburg TVS	Loews
Chickasaw Nation	Hawaii Visitors and Convention Bureau	LVH Hotel Las Vegas
Cinespace Chicago Film Studios	Hayes and Jarvis	Macerich
Clackamas County Tourism and Cultural Affairs (Oregon Mt. Hood's Territory)	Heritage Corridor Convention and Visitors Bureau	Macy's
Coastal South Carolina	Hersha Hospitality	Maine Office of Tourism
Colorado Ski Country	High Lantern Group	Mammoth Lakes Tourism (Visit Mammoth)
Colorado Tourism Office	Hilton Head CVB	Marianas Visitors Authority
Convention News Television	Holiday Specialists	Marriott Vacations Worldwide
Cosmopolitan Las Vegas	Hollywood Community Redevelopment Agency (Florida's Hollywood Community Development Agency)	Maryland Office of Tourism (Visit Maryland)
Delaware Economic Development Office (Visit Delaware; Delaware Tourism Office)	Hoot Holidays	Meltwater
Denver Convention and Visitors Bureau (Visit Denver)	Horizon Travel Magazine	MGM Mirage Las Vegas
Destination Marketing Association International (DMAI)	Host Hotels and Resorts, Inc.	MGM Resorts
Detroit Metro Convention and Visitors Bureau (Meet Detroit)	Houma Area Convention and Visitors Bureau	Miami Seaquarium
Diversity Tourism	House and Garden	Monroe-West Monroe CVB (Louisiana)
	Iceland Air Scandinavia	Nashville Convention and Visitors Corp. (Visit Music City)
	Illinois Consortium	Natchitoches Parish Tourist Commission and Cane River National Heritage Area
	Intercontinental The Barclay New York	National Parks Council
	Interstate Hotels and Resorts, Inc.	New Hampshire Division of Travel and Tourism Development
	Iowa Tourism Office (Travel Iowa)	New Orleans Plantation Country
	Irvine Company Retail Properties	North Carolina Division of Tourism (Visit NC)
	Jackson Hole Mountain Resort	
	Jackson Hole Travel and Tourism (Joint Powers Board)	

North Dakota Department
of Commerce
Northern Virginia Visitors Consortium
Northwood Investors
(Northwood Hospitality)
Novak Birch
Ohio Office of Tourism
Oklahoma Tourism and Recreation
Oneida County Tourism
Outdoor Revolution Ltd.
Palm Beach County Cultural Council
Papillon
Pasco County Board of
County Commissioners
Patton Boggs, LLP
Pocono Mountains Visitors Bureau
Prince William County and Manassas
Convention and Visitors Bureau
Raleigh CVB
Red Roof Inns, Inc
Redding, CA
Reservationsystem.com/Bookit.com
RLJ Lodging Trust
Roy's Restaurant
San Diego International Airport
San Diego Tourism Authority
San Diego Zoo
San Francisco Cruises

San Marcos Convention
and Visitors Bureau
Santa Cruz County Conference and
Visitors Council
Santa Monica Convention and
Visitors Bureau
Shenandoah Valley Travel Association
Shop America Alliance
St. Augustine, Ponte Vedre and the
Beaches Visitors and Convention
Bureau (St. Augustine Ponte Verde,
Florida's Historic Coast)
St. Petersburg/Clearwater CVB
St. Tammany Tourist and Convention
Commission (Louisiana Northshore)
Station Casinos
Sterling Jewelers, Inc.
Sunwing Vacations Inc.
Syracuse Convention and Visitors
Bureau (Visit Syracuse)
Telluride Tourism Board and Telluride
Ski Resort
The Broadmoor
The Official Tourism Marketing
Corporation for The Palm Beaches
(Discover Palm Beach County)
The Taubman Company LLC
Travel Weekly Group
Travelbag Ltd.

Travelbiz
US Chamber of Commerce
Vail Resorts Management Co.
Veolia Transportation
Virginia Beach CVB
Virginia Tourism Corporation
Visit Anchorage
Visit Baton Rouge
Visit Cheyenne (Laramie County
Convention and Visitors Bureau)
Visit Jacksonville (Visit Jacksonville
and the Beaches)
Visit Napa Valley
Visit Savannah
Visit USA Russia
Visit USA Spain
Warner Brothers (Warner Brothers
Studio Tour)
Washington Tourism Alliance
Watkins Glen International
West Hollywood Marketing and
Visitor's Bureau
West Virginia Department of
Commerce (West Virginia Tourism)
White Mountains Attractions
(Visit White Mountains,
New Hampshire)
Wynn Las Vegas

Supporting *(contributions up to \$10,000)*

Accor North America
Alaska Travel Industry Association
Amalfi Hotel Chicago
(a Hostmark Hotel)
America As You Like It
Archers Direct/CosmosAir
AviaReps Marketing Garden
Bloomington CVB
Bowling Green, KY
California Academy of Sciences
Canada Reise Dienst
Cavallo Point Lodge
Central Oregon Visitors Association
(Visit Central Oregon)
Champaign County Convention
and Visitors Bureau (Visit
Champaign County)
Chicago's North Shore CVB
Cincinnati Convention and Visitors
Bureau (Cincy USA)
Cleveland Convention and Visitors
Bureau (Positively Cleveland)
Visit Colorado Springs
Connect Worldwide International Inc.

Cruisenation.com
Dallas Convention and Visitors Bureau
(Visit Dallas)
Donohoe Hospitality
Econo Lodge Times Square
Empire Hotel
enVision Hotel
Fairbanks Convention and Visitors
Bureau (Explore Fairbanks)
Flagler County Chamber of Commerce
Visitor's Center (Palm Coast and the
Flagler Beaches)
Florida's Space Coast
(Visit Space Coast)
Visit Fredericksburg, VA
G Adventures
Galleria Dallas
Gettysburg Travel
Grand Canyon Railway
Greater Columbus Convention
and Visitors Bureau
(Experience Columbus)
Greater Palm Springs Convention and
Visitors Bureau (Visit Palm Springs)

Greater Pittsburgh Convention and
Visitors Bureau (Visit Pittsburgh)
Hana Tour
Hertz Global Holdings, Inc.
Indiana Office of Tourism
(Visit Indiana)
Intrepid Travel
Jay Peak Resort
Jekyll Island Authority (Jekyll
Island Convention Center;
Jekyll Island Foundation)
Kansas City Convention
and Visitors Association
Kwik Travel
Lake Havasu Tourism Bureau
(Lake Havasu City Convention and
Visitors Bureau)
Lakes Region Tourism Association
Land of Lincoln Regional Tourism
Development Office
Lynda Zengerle
Macon-Bibb County Convention and
Visitors Bureau (Macon Convention
and Visitors Bureau)

OUR PARTNERS

Martin County
Maui Convention and Visitors Bureau
Michigan Lodging and
Tourism Association
Mississippi River Country USA
Mode Tour
Modern Management Services, LLC
Mundo Turistico
National Tour Association
New England Inns and
Resorts Association
Nippon Travel Agency Co., LTD
North America Travel
Orlando Flex Ticket
Pasadena Convention and Visitors
Bureau (Visit Pasadena)
Pennsylvania Tourism Office
Phoenix International Publishing, LLC
Plymouth County CVB (See Plymouth)
Pontiac, IL
Premium Outlets
Puerto Rico Tourism Company
Quad Cities CVB (Illinois Consortium)
RandC Tours Co. Ltd.

Red Lion Anaheim Maingate
Richmond CVB
Rockford Area CVB (Go Rockford)
San Juan Islands Visitors Bureau (Visit
San Juans)
Santa Barbara Conference and
Visitor's Bureau and Film Commission
(Visit Santa Barbara)
Scottsdale Convention and
Visitors Bureau
Sonoma County
Source Communications
South Street Seaport and Museum
Sports Travel Magazine
State of Alaska Division of Economic
Development (Alaska Department
of Commerce, Community and
Economic Development)
TAP PORTUGAL
The Holiday Place
Tour America Inc.
Tour Magazine
Trump International Hotel and Tower
Las Vegas

US Traveler Magazine
Visit Akron-Summit
Visit Indy
Visit Loudoun County
Visit Mendocino County Inc.
Visit Nebraska
Visit New Haven
Visit Newport Beach Inc.
Visit Oakland
Visit Sarasota
Visit Spokane
Warren County, OH
White Pass Scenic Byway - WA
Wiechmann Tourism Service
Williams-Grand Canyon Chamber of
Commerce (AZ)
Yosemite National Park
Yosemite Sierra Visitors Bureau



OUR SHARED COMMITMENT

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.

Christopher L. Thompson

President & CEO



Thomas Garzilli

Senior Vice President,
Global Partner Marketing



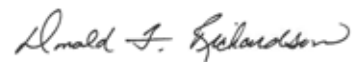
Anne Madison

Chief Communications Officer



Donald Richardson

Chief Financial Officer



Connect With Us

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

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

Website: www.thebrandusa.com

Twitter: @BrandUSA

YouTube: <http://www.youtube.com/user/BrandUSATV>

Tumblr: <http://brandusa.tumblr.com/>

LinkedIn: <http://www.linkedin.com/company/brandusa>

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

Website: www.discoveramerica.com

Twitter: @DiscoverAmerica

Facebook: [Facebook.com/DiscoverAmerica](https://www.facebook.com/DiscoverAmerica)

YouTube: <http://www.youtube.com/user/YourDiscoverAmerica>

Pinterest: <http://pinterest.com/discoveramerica/>

Instagram: DiscoverAmerica



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