



Fiscal Year 2020 Business Plan

October 15, 2019



ABOUT THIS PLAN



As required by U.S. Code § 2131, the Travel Promotion Act, and as amended by the Travel Promotion, Enhancement, and Modernization Act of 2014, Brand USA submitted a summary version of this plan to the Secretary of Commerce on August 1, 2019. It covers the fiscal year 2020 (FY2020) from October 1, 2019 through September 30, 2020.

The sections submitted to the Secretary of Commerce included:

- The annual objectives Brand USA has established for FY2020.
- The FY2020 summary marketing plan in support of the achievement of these objectives.
- The FY2020 budget, including an explanation of any expenditure provided for by the budget in excess of \$500,000.

TABLE OF CONTENTS

Letter from Christopher L. Thompson4

About Brand USA6

Statement of Purpose, Mission, and Vision7

Situation Analysis8

FY2020 Objectives..... 16

FY2020 Summary Marketing Plan.....22

Market Profiles..... 42

FY2020 Budget.....88

The Brand USA Team 91

Board of Directors93

Connect with Us..... 98

LETTER FROM THE PRESIDENT AND CEO



Dear Partners and Colleagues,

I am proud to share with you Brand USA's FY2020 business plan, which outlines our objectives, goals, and initiatives for the period from October 1, 2019 through September 30, 2020.

As many of you know, this fiscal year marks the 10th anniversary of the signing of the Travel Promotion Act, which established us as the nation's destination marketing organization. When I was honored to be selected as Brand USA's president and CEO in November 2012, we knew we would need to a long-term plan to accomplish what Brand USA was created to do. That year not only did we prepare our first annual business plan, we also built the strategic foundation that would set the course for Brand USA to successfully achieve its mission of increasing incremental international visitation to the United States in order to fuel the nation's economy and enhance the image of the USA worldwide.

We designed our strategic foundation around five key pillars: Create Innovative Marketing, Market the Welcome, Build and Maintain Trust, Add and Create Value, and Drive Results. These are the principles upon which we have been able to drive strong incremental international visitation to the United States and, as such, continue to be the basis of our plan this year.

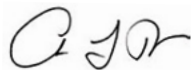
Of course, while our strategic focus remains constant, the challenges we face often differ from year to year — and we must adapt the business plan accordingly. For FY2020, the challenges we face include global economic pressures, a substantial variation in growth trends in Asia and Western Europe, continued tensions driven by trade and political developments across key markets, and even more aggressive competition among destinations for the world's travelers. The details of our FY2020 business plan take these factors fully into account and will enable us to continue to maximize the return on investment of Brand USA's marketing efforts.

FY2020 is also the final year of our current authorization for federal matching funding. Given the unique nature of this plan year, over the last several months we appropriately established plans to ensure we are prepared for an array of potential reauthorization scenarios, and that we have the financial strength to meet our ongoing commitments to partners, as well as the agility to adjust our plans as conditions warrant. While it is outside our purview to participate in the legislative process, we know there are many champions of our work who are actively advocating for our reauthorization. Moreover, we are confident Brand USA's results demonstrate the positive impact we are having on the nation's economy. As in the past, we believe this support will make itself known during the current reauthorization process. This allows us to remain singularly focused on marketing the United States to international travelers.

In closing, I want to thank you for your continued support of Brand USA. Since our founding in 2010, we've worked together to successfully increase incremental visitation to the United States by approximately 1 million visitors a year, which has infused nearly \$48 billion into the U.S. economy over the past six years and benefited communities of all shapes and sizes. Today there is more recognition than ever before of the importance of travel and tourism as our nation's top services export in creating jobs, as well as helping to connect people and cultures for greater understanding.

We look forward to working with you to fuel our nation's economy by welcoming millions more international visitors to the USA in FY2020 and beyond.

Together, we are marketing the USA!



Christopher L. Thompson,
President and CEO
Brand USA

ABOUT BRAND USA



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

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

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.2 million American jobs* and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked in close partnership with more than 900 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

According to studies by Oxford Economics, over the past six years Brand USA's marketing initiatives have helped welcome 6.6 million incremental visitors to the USA, benefiting the U.S. economy with \$47.7 billion in total economic impact, and supporting, on average, nearly 52,000 incremental jobs each year.

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

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

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

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

STATEMENT OF PURPOSE

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

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

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

Build and Maintain Trust

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

Create Innovative Marketing

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

Add and Create Value

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

Market the Welcome

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

Drive Results

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

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





Situation Analysis

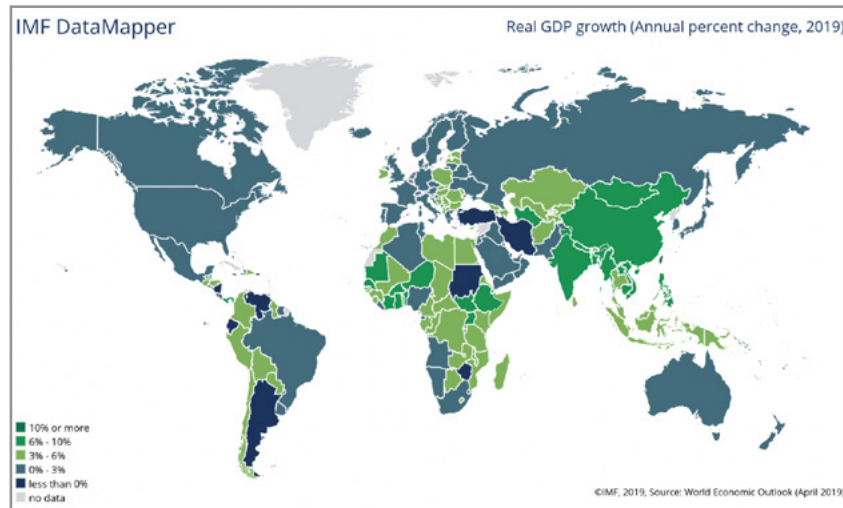
GLOBAL ECONOMIC GROWTH

The International Monetary Fund (IMF) revised down global growth projections for 2019 from 3.9 percent to 3.3 percent, as of April of 2019, due to the economic activity deceleration in the second half of 2018 and the first half of 2019 due to several factors:

- General weakening of financial conditions
- Normalization of monetary policy in the larger advanced countries
- Escalation of the US-China trade tension
- Tightening of the credit policies in China
- Upheavals in the automotive industry in Germany
- Macroeconomic tensions in Argentina and Turkey

Real GDP Growth

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



INTERNATIONAL TRAVELERS TO THE USA

In 2018, the USA welcomed more visitors than ever before - 79.6 million, reflecting 3.5 percent growth compared to the previous year. Growing markets outnumbered declining markets by 3-to-1 and were led by Brazil (+16 percent), Colombia (+12 percent), Chile (+10 percent), Ireland (+10 percent) and India (+7 percent). Both Canada (4.9 percent) and Mexico (3.9 percent) grew in 2018, but neither market has reached previous highs achieved in 2013 and 2016, respectively.

From a regional perspective, 2018 reflects substantial variations from previous trends. Asia, which had been on a growth trajectory since 2010, declined by 2.2 percent. Each of the three largest Asian markets declined, but as a result of differing factors. Japan's static growth has been longstanding - it has maintained a volume close to an average of 3.5 million visitors over the past 15 years. Korea's domestic economic challenges related to high household debt/housing crisis contributed to its decline of 5.3 percent. China's overall economic deceleration (particularly with regard to private sector businesses and the spread of middle class income levels) as well as trade tensions with the USA drove a 5.7 percent decline, ending a remarkable growth streak that began in 2004.

Western Europe, in contrast, grew by 3.3 percent in 2018 as it continued to recover momentum from a steep 6.7 percent decline in 2016. The record year for Western Europe as a region was 2015, however France, Italy and Spain each drove record visitor volume in 2018.

2018 Rank	I-94 Arrivals based on Country of Residence (COR)	2016 Volume (P)	2017 Volume (P)	2018 Volume (P)	2016	2017	2018
	TOTAL INTERNATIONAL (Overseas, Mexico, and Canada)	76,407,488	76,941,365	79,617,625	-1.8%	0.7%	3.5%
	TOTAL OVERSEAS	38,129,404	38,905,524	39,888,361	-1.5%	2.0%	2.5%
1	Total Canada (Source: Stats Canada)	19,287,499	20,212,332	21,211,109	-6.8%	4.8%	4.9%
	Canada Air (Source: Stats Canada)	7,810,277	8,522,139	9,321,625	-2.0%	9.1%	9.4%
2	Total Mexico (Source: Banco de Mexico)	18,990,585	17,823,509	18,523,155	3.4%	-6.1%	3.9%
	Mexico Air (Source: I-94)	2,584,674	2,516,015	2,757,591	-3.4%	-2.7%	9.6%
	9 Major World Regions						
	Western Europe	13,830,360	13,883,744	14,335,789	-6.7%	0.4%	3.3%
	Asia	11,537,906	12,317,018	11,874,014	5.4%	5.2%	-2.2%
	South America	5,406,909	5,556,041	6,026,916	-5.1%	2.8%	8.5%
	Caribbean	1,586,882	1,670,632	1,793,081	7.3%	5.3%	7.3%
	Oceania	1,661,486	1,632,394	1,686,879	-6.0%	-1.8%	3.3%
	Central America	1,187,209	1,167,986	1,283,374	10.3%	-1.6%	9.9%
	Middle East	1,342,230	1,181,644	1,197,387	-1.9%	-12.0%	1.3%
	Eastern Europe	1,000,807	1,089,981	1,088,101	3.5%	8.9%	-2.0%
	Africa	575,615	586,084	597,820	0.5%	1.8%	2.0%
	Top 50 Overseas Countries						
3	United Kingdom	4,587,092	4,482,707	4,659,178	-6.7%	-2.3%	3.9%
4	Japan	3,603,786	3,595,607	3,493,313	-5.0%	-0.2%	-2.8%
5	China, PRC	3,049,942	3,173,915	2,991,813	16.0%	4.1%	-5.7%
6	South Korea	1,982,516	2,334,839	2,210,597	11.7%	17.8%	-5.3%
7	Brazil	1,725,479	1,912,447	2,209,372	-22.6%	10.8%	15.5%
8	Germany	2,046,288	2,080,425	2,062,462	-10.4%	1.7%	-0.9%
9	France	1,641,152	1,667,506	1,767,467	-7.1%	1.6%	6.0%
10	India	1,206,771	1,285,466	1,378,035	5.1%	6.5%	7.2%
11	Australia	1,350,508	1,323,703	1,362,431	-7.1%	-2.0%	2.9%
12	Italy	988,860	1,032,107	1,073,383	-5.4%	4.4%	4.0%
13	Argentina	926,321	1,018,177	994,035	16.0%	9.9%	-2.4%
14	Colombia	852,618	841,931	942,617	-1.1%	-1.3%	12.0%
15	Spain	807,447	826,818	876,248	6.2%	2.4%	6.0%
16	Netherlands	674,544	700,872	725,283	-7.4%	3.9%	3.5%
17	Ireland	443,005	483,615	530,802	-1.9%	9.2%	9.8%
18	Sweden	560,581	522,211	506,323	-4.7%	-6.8%	-3.0%
19	Venezuela	589,848	500,247	501,572	-1.2%	-15.2%	0.3%
20	Taiwan	466,267	474,699	478,001	5.0%	1.8%	0.7%
21	Switzerland	471,070	441,270	463,139	-12.5%	-6.3%	5.0%

Source: U.S. Department of Commerce, ITA, I&A, National Travel and Tourism Office (NTTO) I-94 Program, Statistics Canada, and Instituto Nacional de Estadística y Geografía/INEGI (Banco de Mexico)

F= Final data

R=Revised data

P=Preliminary data

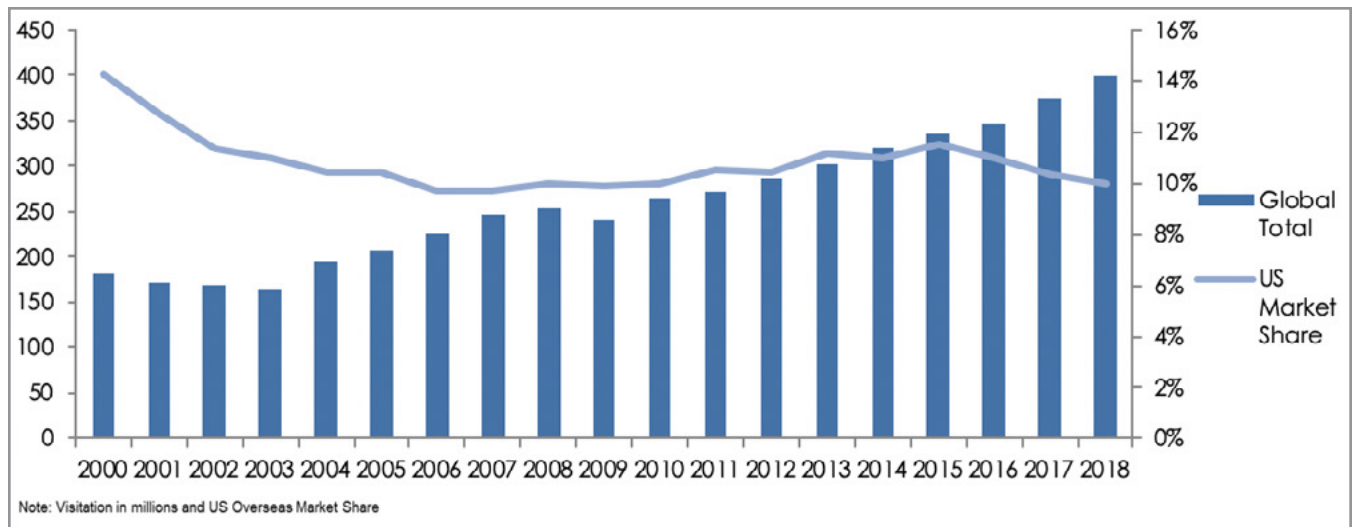
Released: May 2019

International visitors collectively spent a record \$255.5 billion in 2018, a nearly 2 percent increase when compared to 2017. Spending on personal travel including leisure, education and health-related travel increased 2.5 percent. This increase more than offset the decline in business travel (down 1.6 percent), which has been decreasing since 2014.

MARKET SHARE

Although a 3.5 percent increase in international visitation in 2018 is significant, it is not keeping pace with growth in global travel. The USA lost market share for the third consecutive year due to a number of challenges including a strong dollar, international trade tensions and the popularity of competitive destinations.

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



Source: NTTO/Oxford Economics, as of June 2019

The United States in 2018, as shown in the graph above, continued to lose market share of the world’s global long-haul trips. Total global long-haul trips grew by 7 percent in 2018, which was double the pace of the USA (3.5 percent). The table below shows, on a region by region basis, against which markets the USA is losing market share. South & Central America/Caribbean is the only region from which growth in visitation to the USA (8 percent) outpaced the rest of the world (6 percent).

Origin	Top Destination Share Winners	2018 Growth
Europe	Middle East & Africa	14%
	South & Central America, Caribbean	9%
North America	Asia	12%
	Europe	10%
Asia	Oceania	6%
	Europe	6%
Middle East & Africa	South & Central America, Caribbean	9%
	Europe	7%
Oceania	Asia	11%
	South & Central America, Caribbean	10%
South & Central America, Caribbean	Middle East & Africa	8%

Source: NTTO/Oxford Economics, as of July 2019

Based on the expected continued strength of the dollar and continued tensions across key markets based on trade and political dynamics, Brand USA anticipates that 2019 and 2020 will present a challenging environment for increasing demand and reversing U.S. market share loss.

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

Overall modest growth in arrivals to the United States is projected for 2019 and 2020, maintaining the trend seen in 2018, according to the latest forecast from NTTO released in October of 2018; however, this forecast is subject to change to reflect 2017 revised volumes and 2018 preliminary figures released in May of 2019.

According to monthly arrivals to the USA, from January through May 2019, high- to mid-single digit growth has been reported from the United Kingdom (+8.2 percent), Japan (+6.5 percent), France (+4.1 percent), India (+4.0 percent), and Spain (+8.2 percent). Arrivals from China and South Korea, on the other hand, remain on the negative side, displaying similar growth rates seen in 2018. Brazil (-2.1 percent) and Argentina (-23.3 percent) have dropped substantially from their 2018 growth levels as their domestic economic challenges dampen near term prospects.

YTD May 2019 Rank	I-94 Arrivals based on Country of Residence (COR)	YTD May 2019 Volume (P)	YTD May 2019 Percent Change
	TOTAL OVERSEAS	15,457,563	2.0%
1	Total Canada (Source: Stats Canada)		
	Canada Air (Source: Stats Canada)		
2	Mexico Total (Source: Banco de Mexico)		
	Mexico Air (Source: I-94)	1,100,198	9.7%
	9 Major World Regions		
	Western Europe	5,494,937	3.7%
	Asia	4,823,903	1.3%
	South America	2,361,901	-2.9%
	Caribbean	620,002	11.2%
	Oceania	597,232	-1.8%
	Central America	499,340	12.7%
	Eastern Europe	439,963	4.2%
	Middle East	426,925	1.9%
	Africa	193,360	-8.9%
	Top 50 Overseas Countries		
3	United Kingdom	1,829,854	8.2%
4	Japan	1,466,240	6.5%
5	China, PRC	1,179,812	-3.1%
6	Brazil	898,435	-2.1%
7	South Korea	868,306	-4.4%
8	Germany	763,861	-0.9%
9	France	711,538	4.1%
10	India	606,841	4.0%
11	Australia	486,556	-1.9%
12	Italy	373,900	1.4%
13	Argentina	370,038	-23.3%

YTD May 2019 Rank	I-94 Arrivals based on Country of Residence (COR)	YTD May 2019 Volume (P)	YTD May 2019 Percent Change
14	Colombia	352,728	12.5%
15	Spain	315,494	8.2%
16	Netherlands	279,574	1.4%
17	Taiwan	200,734	6.1%
18	Ireland	195,377	-1.3%
19	Ecuador	186,863	6.5%
20	Sweden	185,554	-11.4%
21	Switzerland	177,726	9.2%

Sources: U.S. Department of Commerce, ITA, I&A, National Travel and Tourism Office (NTTO) I-94 Program, Statistics Canada, and Instituto Nacional del Estadística y Geografía/INEGI (Banco de Mexico)

P= preliminary data
Released: June 2019

Forecast of International Travelers to the United States by Top Origin Countries																		
Estimates in thousands																		
Rank	Visitor	%		%		%		%		%		%		%		% CAGR		
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	Change
2018	Country	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	2024	24/23	24/18	24/18	24/18
	Grand Total	79,882	3.4%	79,101	-1.0%	80,660	2.0%	82,887	2.8%	85,341	3.0%	88,005	3.1%	90,807	3.2%	10,925	13.7%	2.2%
1	Canada	21,475	4.8%	20,831	-3%	21,456	3%	21,885	2%	22,541	3%	23,443	4%	24,381	4%	2,906	14%	2.1%
2	Mexico	18,523	3.9%	17,782	-4%	17,960	1%	18,499	3%	19,054	3%	19,625	3%	20,214	3%	1,691	9%	1.5%
	Overseas	39,883	2.5%	40,487	1.5%	41,245	1.9%	42,503	3.1%	43,745	2.9%	44,936	2.7%	46,211	2.8%	6,328	15.9%	2.5%
3	United Kingdom	4,659	3.9%	4,846	4%	4,942	2%	5,091	3%	5,193	2%	5,296	2%	5,402	2%	743	16%	2.5%
4	Japan	3,493	-2.8%	3,668	5%	3,705	1%	3,779	2%	3,817	1%	3,855	1%	3,893	1%	400	11%	1.8%
5	China	2,992	-5.7%	2,842	-5%	2,871	1%	2,985	4%	3,135	5%	3,323	6%	3,522	6%	530	18%	2.8%
6	South Korea	2,211	-5.3%	2,188	-1%	2,210	1%	2,255	2%	2,300	2%	2,346	2%	2,393	2%	182	8%	1.3%
7	Brazil	2,209	15.5%	2,209	0%	2,254	2%	2,344	4%	2,437	4%	2,511	3%	2,611	4%	402	18%	2.8%
8	Germany	2,062	-0.9%	2,062	0%	2,083	1%	2,125	2%	2,167	2%	2,211	2%	2,255	2%	192	9%	1.5%
9	France	1,767	6.0%	1,856	5%	1,930	4%	2,007	4%	2,067	3%	2,130	3%	2,215	4%	447	25%	3.8%
10	India	1,378	7.2%	1,433	4%	1,533	7%	1,625	6%	1,707	5%	1,792	5%	1,882	5%	504	37%	5.3%
11	Australia	1,362	2.9%	1,349	-1%	1,376	2%	1,431	4%	1,488	4%	1,548	4%	1,594	3%	232	17%	2.7%
12	Italy	1,073	4.0%	1,095	2%	1,117	2%	1,139	2%	1,162	2%	1,185	2%	1,209	2%	135	13%	2.0%
13	Argentina	994	-2.4%	835	-16%	768	-8%	768	0%	791	3%	831	5%	881	6%	-113	-11%	-2.0%
14	Colombia	943	12.0%	980	4%	1,020	4%	1,060	4%	1,092	3%	1,125	3%	1,159	3%	216	23%	3.5%
15	Spain	876	6.0%	929	6%	947	2%	966	2%	986	2%	996	1%	1,005	1%	129	15%	2.3%
16	Netherlands	725	3.5%	725	0%	740	2%	755	2%	770	2%	785	2%	801	2%	75	10%	1.7%
17	Ireland	531	9.8%	531	0%	547	3%	563	3%	580	3%	592	2%	603	2%	73	14%	2.2%
18	Sweden	506	-3.0%	441	-13%	436	-1%	436	0%	440	1%	445	1%	454	2%	-53	-10%	-1.8%
19	Venezuela	502	0.3%	421	-16%	396	-6%	388	-2%	384	-1%	377	-2%	369	-2%	-133	-26%	-5.0%
20	Taiwan	478	0.7%	502	5%	522	4%	543	4%	559	3%	576	3%	587	2%	109	23%	3.5%
21	Switzerland	463	5.0%	482	4%	496	3%	511	3%	526	3%	537	2%	548	2%	84	18%	2.8%

CAGR = Compound Annual Growth Rate--the average annual rate of growth over the forecast period from the base year, including compounded growth.

Overseas includes all countries except Canada and Mexico.

Sources: U.S. Department of Commerce, International Trade Administration, Industry & Analysis, National Travel and Tourism Office; Statistics Canada; INEGI. October 2019

BRAND USA RETURN ON INVESTMENT

Since 2013, Brand USA has commissioned Oxford Economics to conduct an analysis of our key performance indicators and calculate the return on investment for the marketing investments made as well as the entire organization's expenditures each year. 2018 results show strong performance overall, and record highs for incremental visitor spending, total sales impact and tax receipts. The strength of 2018 results was driven by several factors:

Effective Market Selection and Prioritization

- Brand USA allocated more of its spending to stronger ROI markets. France had the highest ROI – it was prioritized at a higher level for the first time in 2018 due to the market intelligence indicators (both behavioral and cultural) pointing to a strong opportunity to increase market share. Beyond France's exception, the emerging markets generally drove higher ROI than mature markets – India and Brazil at the high end and Canada and UK at the low end.
- Because emerging markets generally deliver a stronger ROI, Brand USA set a target for the ratio of marketing budget spent in emerging markets (Latin America and Asia Pacific) versus mature markets (North America and Europe). The emerging market target was 45% for 2018, and we were able to exceed that target at 46% in 2018, up from 40% in 2017.

Above average ratio of media to non-media (creative production, translations, agency fees, etc.) spending

- Improved media spend ratio from 55% of all marketing expenditure in 2017 to 63% in 2018. According to a cross-industry marketing spend study produced by Percolate, the industry average is 60%, and the best performers achieve 76% on average.

Non-endemic consumer targeting yielded stronger advertising lift

- Data show that while the "Hear the Music" campaign had lower post-exposure arrival rates overall, the lift (variance between exposed consumers and a control group) was substantially stronger when tested against our 2017 campaign "See How Far You Can Go" in nearly all the target markets. "Hear the Music" incorporated music affinity in its targeting, while "See How Far You Can Go" focused on travel affinity targeting.

Over the past six years, Brand USA's marketing efforts have generated...

900+
partners



6.6 million
incremental visitors



\$21.8 billion
incremental spending



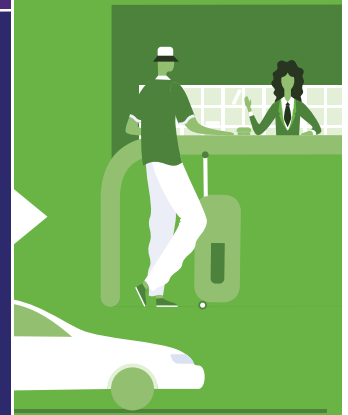
51,000+
incremental jobs
supported
each year

HOTEL

\$6.2 billion
federal, state &
local taxes



\$47.7 billion
total economic
impact



Source: Oxford Economics

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



FY2020 Objectives

FY2020 OBJECTIVES, GOALS, AND CORE STRATEGIES



DRIVE RESULTS

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

Goals:

- 1.39 million incremental international visitors (+7 percent vs FY2019 target).
- \$5.5 billion in incremental international spend (+10 percent vs FY2019 target).
- \$9.79 billion in total economic impact (+3 percent vs FY2019 target).
- Marketing ROI 32:1; overall ROI 29:1 (vs FY2019 targets of 30:1 and 27:1).
- Overhead below 15 percent.

FY2020 Strategies:

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



CREATE INNOVATIVE MARKETING

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

Goals:

- Ensure equal marketing of rural and urban areas across the total of all marketing efforts.
- Support all 50 states, the District of Columbia, and five territories.
- Protect and maintain average intent to visit across all markets at 60 percent.

FY2020 Strategies:

- Develop FY2020 marketing and communications plans to promote the exceptional experiences and possibilities in the USA, the value of visiting the USA, and the welcoming nature of the United States—leveraging music, culture, and exploration as core platforms.
- Continue to promote the USA's great outdoors; neighborhoods, cities, and towns; arts and culture; culinary; and road trips.
- Promote the inherent diversity of experiences to, through, and beyond the gateways across, consumer, trade, and co-operative marketing initiatives.
- Continue development and expansion of content and marketing—leveraging the most effective channels to reach travelers.
- Continue marketing and distribution of "America's Musical Journey" and "National Parks Adventure" and support the launch of "Into America's Wild," Brand USA's third giant-screen film, which is focused on exploration.
- Continue leadership in high-engagement technologies.
- Expand marketing insights to gauge travel motivators, track sentiment, and evaluate performance.
- Sell the inherent diversity of experiences in order to fuel initial discovery, return trips, and extending the stay—with experience-first storytelling strategies.
- Leverage market prioritization and segmentation to engage travelers where they are in the travel lifecycle.
- Leverage product development through travel trade website.



MARKET THE WELCOME

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

Goals:

- Deploy international arrival program in 15 international arrival halls and/or embassies/consulates.
- Increase translated content regarding practical travel information and entry policy on consumer websites by 25 percent.

FY2020 Strategies:

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

4

BUILD AND MAINTAIN TRUST

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

Goals:

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

FY2020 Strategies:

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

5

ADD AND CREATE VALUE

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

Goals:

- Generate \$100 million in contributions from private industry and other non-federal sources (with no less than 30 percent from cash contributions and no more than 70 percent from in-kind contributions).
- Earn a 90 percent or better (top 2 boxes) on the partner satisfaction survey question “Brand USA’s partnership provides value to my organization.”
- Earn an 85 percent or better partner program retention rate.

FY2020 Strategies:

- Optimize cash and maximize in-kind content contributions.
- Expand sponsorship revenue streams.
- Expand program offerings for smaller destinations.
- Expand global trade strategies for product development.
- Overhaul our international trade show and outreach strategies.
- Increase the footprint of Brand USA Travel Week throughout Europe and India.
- Execute partner feedback study and report results.
- Build upon the effectiveness of our overall destination marketing strategies by leveraging the strength of Federal resources, including embassies and consulates, as well as Visit USA committees worldwide.
- Time development and roll out of partner program offerings to align with partner needs.
- Continue to create new/improved product (relevant, sample itineraries, toolkits) for trade use.
- Educate and train destinations on how to build product and work internationally.
- Introduce India & China Ready programs to educate Brand USA stakeholders to achieve the cultural awareness and knowledge necessary to provide service standards that Indian and Chinese travelers require.
- Expand reach of the USA Discovery Program and continue to maintain and incentivize current users.
- Enhance the value of USA Pavilions and presence at international trade shows (right presence, right markets, and right shows).
- Continue to establish programs that allow partners to contribute and engage across all markets to leverage and promote their assets to international audiences.
- Continue to create tour operator campaigns to maximize destination partners’ product.



FY2020 Summary Marketing Plan

PLANNING APPROACH

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

For FY2020, our core platform will focus on exploration, which will most prominently be featured in a giant-screen film and will be supported by influencer campaigns, events, and other promotional efforts. This focus will be supplemented with complementary marketing platforms that showcase music and culture; the great outdoors; USA neighborhoods, cities, and towns; culinary and USA road trips. To ensure that our efforts in each of these areas credibly resonate with travelers and are effective, our planning approach will be integrated across authentic channels that optimize return on investment.

To facilitate full integration, Brand USA will build consumer- and trade-driven initiatives steeped in storytelling, educating, and sharing that will not only help increase engagement with traveler intenders and inspire international visitation to the United States, but also help amplify the efforts of U.S. travel brands and destinations.

Strategic Integration

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

PROMOTIONAL ACTIVITIES

During FY2020, Brand USA will continue to utilize its core program of market-driven marketing and advertising, as well as consumer and trade platforms and programs, to increase inbound visitor travel to the United States and drive tourism dollars to rural and urban communities in all 50 states, the District of Columbia, and the five territories.

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

TARGET MARKETS AND MARKET PRIORITIZATION

In order to accelerate growth in international arrivals during FY2020, Brand USA will concentrate its marketing efforts in the right markets (those with the strongest indicators of growth) at the right time (when travelers are most motivated to plan and activate travel). We will determine these markets by utilizing our market selection model that looks at 10 factors, detailed in the chart below.

Market Selection Criteria

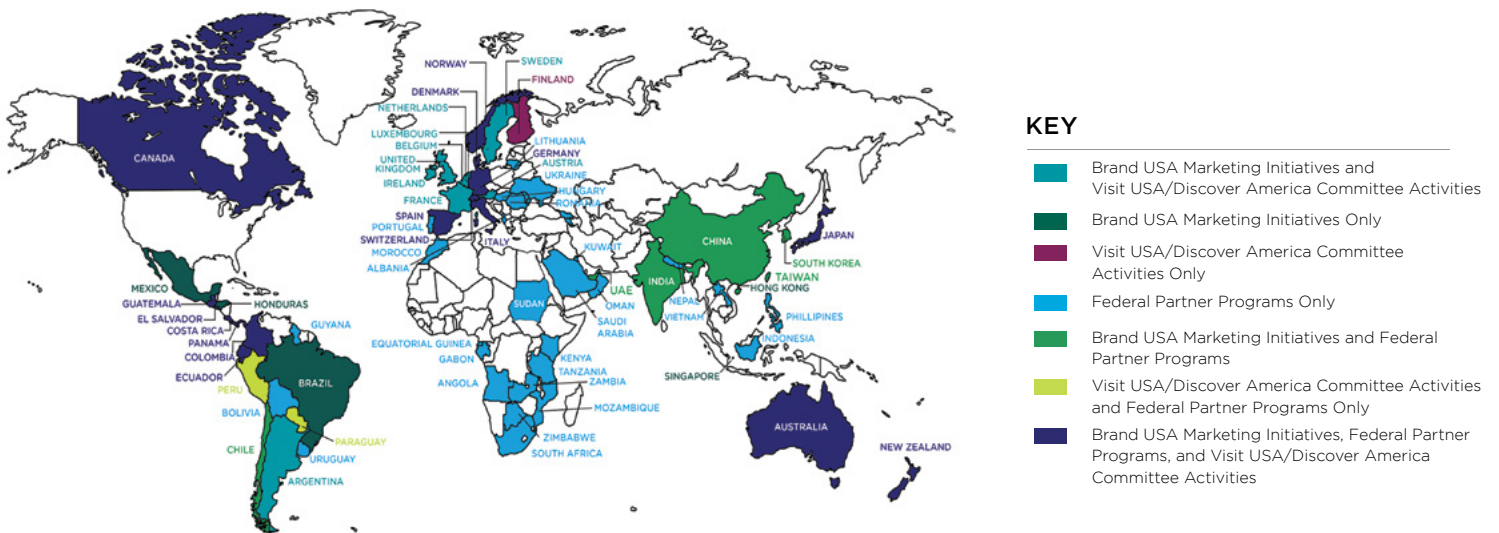


This market selection model helps Brand USA identify the markets that offer the most incremental growth potential. As we utilize this model, we see the objective of defending market share that was otherwise poised for decline equally important as growing market share. It's also important to note that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

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

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

During FY2020 Brand USA will deploy its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share. In total, through the combined total of Brand USA’s cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort will be present in more than 40 markets, including:



- KEY**
- Brand USA Marketing Initiatives and Visit USA/Discover America Committee Activities
 - Brand USA Marketing Initiatives Only
 - Visit USA/Discover America Committee Activities Only
 - Federal Partner Programs Only
 - Brand USA Marketing Initiatives and Federal Partner Programs
 - Visit USA/Discover America Committee Activities and Federal Partner Programs Only
 - Brand USA Marketing Initiatives, Federal Partner Programs, and Visit USA/Discover America Committee Activities

- Albania
- Angola
- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- Equatorial Guinea
- Finland
- France
- Gabon
- Germany
- Guatemala
- Guyana
- Honduras
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Italy
- Japan
- Kenya
- Kuwait
- Lithuania
- Luxembourg
- Mexico
- Morocco
- Mozambique
- Nepal
- Netherlands
- New Zealand
- Norway
- Oman
- Panama
- Paraguay
- Peru
- Philippines
- Portugal
- Romania
- Saudi Arabia
- South Africa
- Tanzania
- Ukraine
- United Arab Emirates
- Uruguay
- Vietnam
- Zambia
- Zimbabwe

LEVERAGING MANY VOICES TO REACH INTERNATIONAL TRAVELERS

During FY2020, Brand USA will continue to utilize its “many voices” content strategy to inspire international travelers. This will enable us to give a voice to real travel experiences in the USA.

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

Creates urgency and provoke “travel dreaming” by highlighting first person perspectives of local, expert influencers and travelers alike.

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

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

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

The *Many Voices* Platform

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

Who are the Many Voices?



LOCALS

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



VISITORS

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



CATEGORY EXPERTS

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



CREATIVE CLASS

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

Screen Strategy and Storytelling Platforms

During FY2020, we will continue to utilize our successful storytelling approach to distribute content and make it accessible to travelers throughout the world from mobile to the giant screen and everything in between. Our ongoing call to action: Visit the USA.



Mobile



Laptop/Desktop



Smart TV



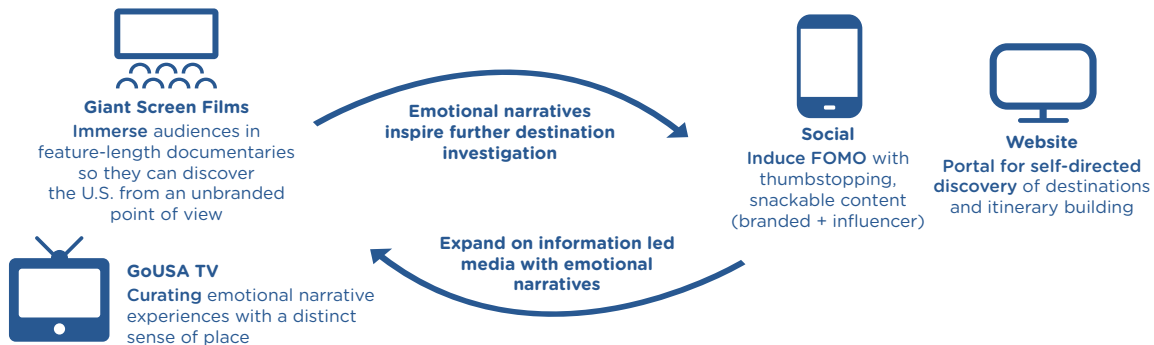
Digital OOH



Giant Screen

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

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



PROXIMITY

In order to demonstrate the value that international travelers can find in a single trip to the USA, we will continue to use our proximity marketing approach to promote U.S. destinations and experiences to, through, and beyond the gateways. As such, the objective of our creative and promotional messaging will be to motivate repeat visits to the USA as these travelers tend to stay longer and spend more:

Diversity

The diversity of the USA's destinations and people is exciting and unique.

Experiences

The USA offers nearly limitless authentic travel experiences.

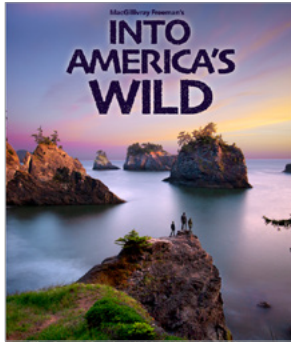
Proximity

The proximity of the USA's diverse and authentic travel experiences (to, through, and beyond the gateways) provides travelers more value in a single visit than any other destination in the world.

GLOBAL CAMPAIGNS

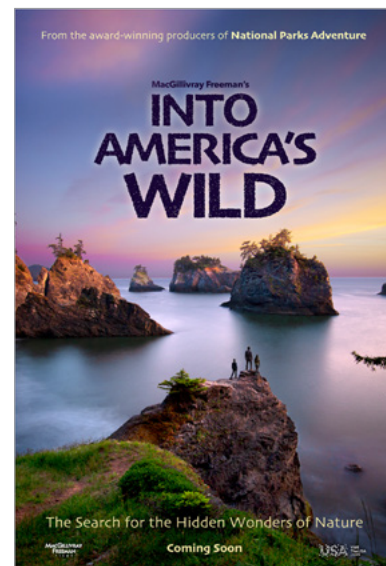
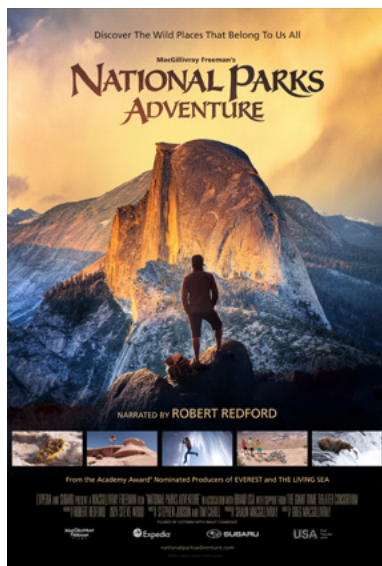
During FY2020, Brand USA's global campaigns will include the following primary initiatives: Giant-screen films, GoUSA TV, and United Stories.

GoUSA TV



Giant-Screen Films

We will continue to promote and expand distribution of our first two giant-screen films, “National Parks Adventure” and “America’s Musical Journey” through FY2020, as well as introduce our third film in international theaters in order to promote exploration and the trailblazing spirit of the United States.



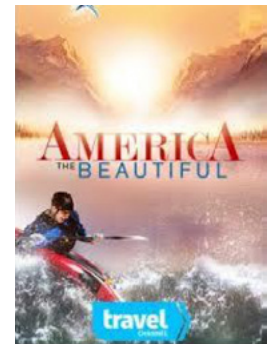
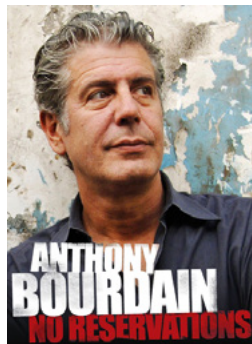
Cinematic film production has proven to be our highest ROI generating marketing effort. In fact, based on a study by Oxford Economics, “National Parks Adventure” is estimated to have generated 46,710 trips to the USA, \$173 million in visitor spending, and a total economic impact of \$376 million in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

Giant-screen films provide the opportunity for highly immersive and influential storytelling that bring focus to large areas of the country and varied experiences. The content is also evergreen and can be used for multiple purposes.

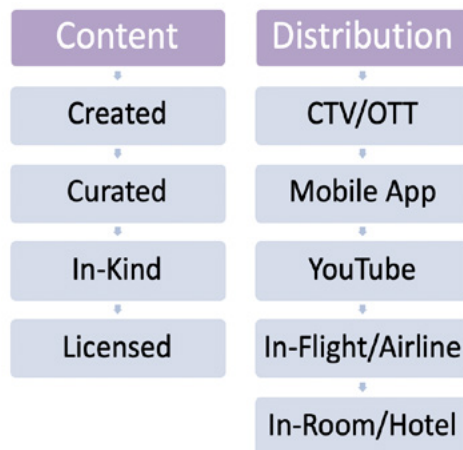
Our third film, which currently has as its working title “Into America’s Wild,” will be our highest-profile marketing effort focused on exploration. The film will open in February 2020 with a global premiere in Washington, DC, and then will launch on a market-by-market basis all over the world. Premiere events and marketing support are planned internationally.

GoUSA TV

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



During FY2020, we will expand GoUSA TV content and distribution beyond streaming/over the top (OTT) and mobile apps to include YouTube and in-flight channels—all with the objective of enticing more people to watch more content for more minutes.



United Stories

During FY2019, Brand USA launched United Stories, a socially-driven campaign, that incorporates a mobile content lab that is traveling the United States capturing warm and welcoming stories told from local perspectives. During FY2020, we will continue this successful campaign with stories about multiple destinations and experiences that will inspire international travelers to visit the USA.

Accomplished content creators, storytellers, and influencers will visit various points of interest, events, and attractions across the country in visually arresting vehicles branded with #UnitedStories.

Take the scenic route. Stop for storytellers.

Sing your heart out. Relax. Enjoy.

We are the USA. A collection of places and experiences whose spirit is found in its diversity. We're here to show you that behind every mountain, every skyscraper, whether on the fast lane or a country road,

there are many voices who are happy to guide you.

We are the United Stories of America.



Brand USA will continue its partnership with Beautiful Destinations, the world's largest tourism community on social media and a global media brand dedicated to capturing best-in-class travel content, to both create and promote United Stories. This collaboration is allowing Brand USA to generate content at the speed of consumption and showcase the breadth and depth of the USA like never before.

Core Digital and Social Media Channels

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

Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

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

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

Social Media Channels

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

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

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

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

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

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

Digital Channels

MARKET	URL	LOCAL TAGLINE	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSACA	@VisitTheUSACA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSACA	@VisitTheUSACA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSACL	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	n/a	Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSACn Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA Youku (YouTube equivalent): http://i.youku.com/gousacn Weishi (Vine equivalent): http://www.weishi.com/u/23484775 Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局 Lofter (Photo sharing platform): http://GoUSA.lofter.com			
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSACO	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAfr	@VisitTheUSAfr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUSADE	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSADE
India	GoUSA.in	Plan Your USA Trip Now	facebook.com/GoUSAin	@GoUSAin	#USATrip	VisitTheUSA	YouTube.com/GoUSAin
Japan	GoUSA.jp	今すぐ USAへの旅の計画を	facebook.com/GoUSAjp	@GoUSAjp	アメリカ旅行	VisitTheUSA	YouTube.com/GoUSAjp
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	facebook.com/VisitTheUSAMX	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	facebook.com/GoUSAKr	@GoUSAKr	#미국여행	VisitTheUSA	YouTube.com/GoUSAKr
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUSAse	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Taiwan	GoUSA.tw	n/a	facebook.com/GoUSA.official	n/a	n/a	n/a	n/a
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	facebook.com/VisitTheUSAuk	@VisitTheUSAuk	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA

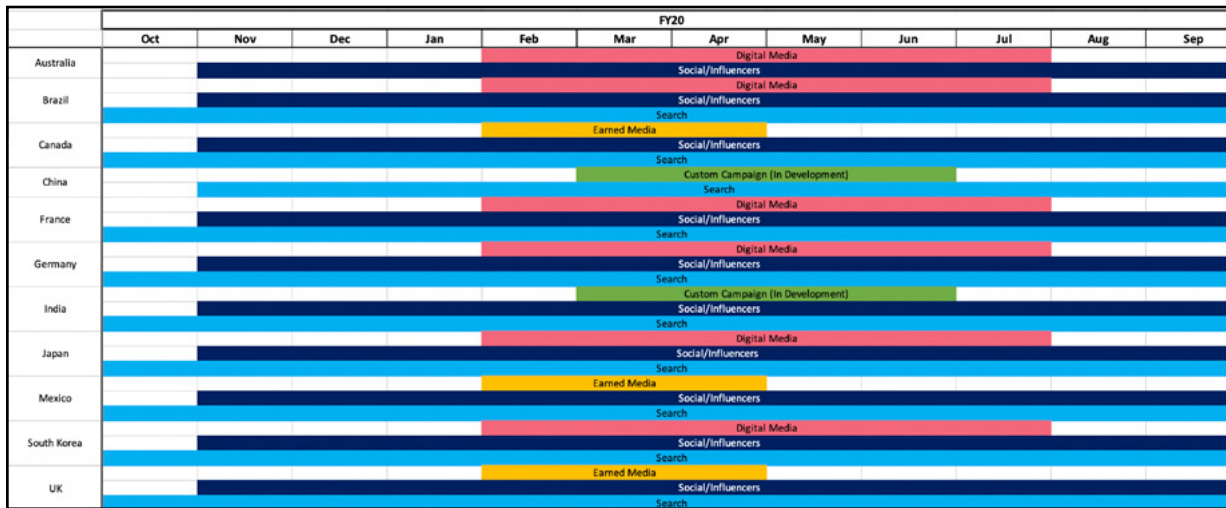
Media Plan

During FY2020, our media and messaging will continue to be topical, timely, and engaging. To that end, our approach to media planning and buying for the coming fiscal year will be a collaborative effort with our partner and global trade marketing teams. This will allow us to identify key opportunities in each market with more efficient spending and relevant content.

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

FY2020 Media Markets

(subject to change)



KEY:



COOPERATIVE MARKETING (CONSUMER-FOCUSED)

During FY2020, Brand USA will continue to leverage cooperative marketing programs to reach travelers in more than 40 international markets.

Brand USA establishes global media partnerships through in-kind contributions, which provide further distribution of both our consumer and co-op campaigns. For FY2020, these media partnerships include BBC, EuroNews, and Bloomberg in global markets; CTrip and Ipinyou in China; Nine in Australia; NZME in New Zealand; ESPN in Mexico; and Times of India, Hot Star, and Make My Trip in India.



Global Inspiration Program

Reach high-value audiences around the world through the award-winning Visit The USA Inspiration Program. Exciting, inspiring content is translated into nine languages and distributed to more than 50 countries using a multi-faceted digital, mobile and print strategy. Showcase your destination or travel-related business in the most valuable international markets through this one robust program.

Multi-Channel Program

The Brand USA Multi-Channel Program provides an extraordinary opportunity to take advantage of the top media channels that international consumers use most. Each Multi-Channel Program campaign guides travelers from Inspiration to booking using customized calls-to-action, generating real, measurable results.

Market Specific Programs

Extend your reach into your target markets by leveraging Brand USA's exclusive programs with market-specific media vendors, tour operators and airlines.

Rogers Media

Promote your destination with the leading Canadian communications and media company. Packages include a multi-platform campaign that advertises across Rogers' vast Digital Media Network and dynamic TV programming on City TV. New this year: an Air Canada advertising layer to enhance program value and extend reach to Canadians booking travel with Air Canada.

FlightNetwork

Target the Canadian traveler using the largest online travel agency that is both owned in operated in Canada. This high-impact, multi-faceted and activation-driven campaign provides partners the ability to strategically reach Canadians using advertising across display, email and social channels.

CTrip Program

Reach millions of Chinese travelers with a custom-built campaign page promoting bookable product supported by impactful advertising on China's largest OTA. CTrip provides travel services to more than 300 million members, providing a high level of exposure for your travel brand.

China Social Influencer Program

Promote your unique local experiences to Chinese millennial travelers with the “I Know This Spot” Chinese-English digital travel series. Leading Chinese influencer Jessica Beinecke bridges cultural and language barriers as she highlights U.S. destinations in exciting travel videos which have been viewed 100+ million times on Chinese social media.

Televisa

Televisa is a Mexican multimedia mass media company and the largest in the Spanish-speaking world. Brand USA is partnering with Televisa to create a special opportunity for destinations to influence the Mexican traveler through pay TV, along with broadcast and digital channels, to reach a highly-targeted audience with relevant content.

News UK

Reach a qualified audience in the UK with this multi-faceted program that includes stand-alone travel supplements, rich media and digital creative assets, advertorial content, and advertisements across print and digital platforms.

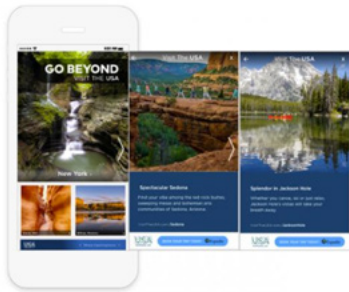
The Telegraph

The Telegraph offers Brand USA partners a multi-channel program that will reach millions of potential travelers through exposure in the UK's No. 1 quality news brand and travel publisher. The Telegraph team will produce both informative and inspiring content that will be amplified across a variety of channels to gain a wider reach.

The JCDecaux - UK Out -of -Home

Dedicated to delivering the highest quality out-of-home advertising solutions, JCDecaux is the No.1 outdoor advertising company in the world. Together, Brand USA and JCDecaux utilize the most sophisticated out-of-home infrastructure to promote U.S. destinations, targeting the UK's young, affluent and urban population.

Video Creation & Distribution



Brand USA's cooperative video program increases consumer engagement, includes international distribution channels and offers partners more ways to deliver their stories to targeted international audiences.

Road Trips

Road Trip videos place the viewer in the driver's seat, highlighting the traveler's perspective and capturing experiences that are high-energy, personal and memorable.

Video Distribution

Harness the power of Media iQ to generate views of your Visit the USA video content with this leading programmatic media-buying platform.

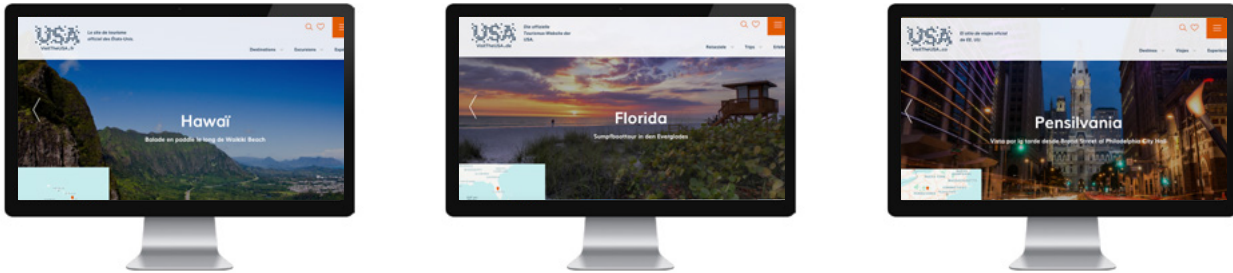
Destination-At-A-Glance

Short, dynamic vignettes about a city or region inspire international travelers who are actively planning their vacations.

Themed Content

Authentic, experience-focused, longer-form videos maximize international reach with a deeper look at a destination's key experiences.

VisitTheUSA Gobal Websites



Showcase your unique destination, experiences and trips on the official global website of the USA. Leverage the VisitTheUSA.com infrastructure to reach more international travelers with engaging custom content and amplify your story across targeted distribution channels.

Destinations

This is the perfect program for showcasing state and city destinations with features such as a photo gallery, video, and attraction and related experience modules that keep users exploring the destination's unique stories.

Trips

This is the ideal space for regions, states and cities to come together to showcase trips featuring overnight stays in multiple destinations.

Experiences

This program is designed for cities, attractions and other travel partners to create robust, multimedia content that tells their stories and benefits from organic and paid marketing strategies.

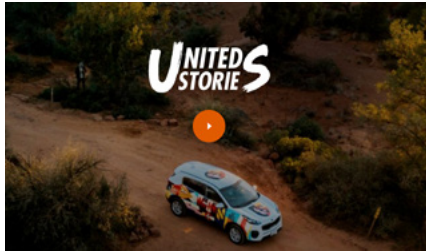
Search Engine Marketing

These targeted and fully-managed campaigns drive traffic directly to partner content on VisitTheUSA websites, increasing a destination's brand awareness internationally.

Digital Reach and Engagement

Generate qualified traffic to your VisitTheUSA content to expand consumer reach and engagement through Outbrain or Taboola, both leading content discovery platforms.

Brand USA Consumer Platform & Programs: Many Voices



We are the USA – a collection of places and experiences whose spirit is found in its diverse range of people. The Brand USA consumer marketing platform gives partners the opportunity to join us in introducing the world to the many voices of the USA.

United Stories

In January 2018, Brand USA launched United Stories, a global marketing campaign which aims to reinvent the Great American Roadtrip, inviting the world to explore exceptional, diverse and nearly limitless travel experiences available in the USA.

This multi-year project will tell stories from the Many Voices across the USA with the help of a series of mobile content creation labs which adapt to the destination, crisscrossing the country finding best-in-class content.

SORTEDfood

SORTEDfood is a group of award-winning UK mega-influencers, lifelong friends who are obsessed with travel and food. They create video content of the most incredible food experiences on the planet in a series of episodes. Brand USA has been developing engaging content with SORTEDfood over the last two years and now there is an opportunity for partners to get involved with its Game Changers series. SORTEDfood will create episodes featuring participating destination partners that will live on SORTEDfood's YouTube channel with extra promotion driving video views.

TRAVEL TRADE MARKETING ACTIVITIES

During FY2020 Brand USA will continue to participate in numerous trade outreach initiatives. We will coordinate much of this activity with an expansive network of international representatives, Visit USA and Discover America committees, and U.S. Commercial Service teams around the globe.

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

Key components of our plan for the year include:

- Expanding our travel trade engagement efforts to connect destinations and attractions with key members of the travel trade in our target markets through sales missions, B2B sessions, and MegaFams, Product Fams, Roadshows, destination training seminars, and joint-marketing campaigns.
- With the expansion of Brand USA Travel Week to India, create a new business platform for destination partners, attractions, and hotels seeking to do business in India.
- Execute Brand USA Travel Week Europe once again in London in 2020 continuing to showcase both established and lesser known destinations and build business relationships with our key trade partners in nearly 20 countries.
- Providing additional resources to the travel trade—including the USA Discovery Program, training seminars, and toolkits.
- Building upon our strong international presence.
- Further expand Brand USA's product development initiative by continuing to develop new itineraries that showcase the lesser known destinations and align to key relevant themes that appeal to international markets. Partner with Receptive Operators and Tour Operators to ensure visibility and placement in their USA programs. Educate our U.S. destinations on product creation and the regionalization of their product.
- Supporting destinations with readiness programs for China and India.
- Continuing to create a product that supports all of Brand USA's initiatives. In addition, based on per market product audits, and identification of product deficiencies, create a timeline and launch a schedule of new itineraries and destinations in each market. Identify key receptive partners and implement a receptive tour operator strategy for each market. Continuing to enhance MegaFams and product fams with tour operator b-to-b sessions; continuing to support Brand USA tour operator co-ops and campaigns with new products.
- Align all trade marketing activities where appropriate to the theme of 'Exploration' in anticipation for the launch of the third giant screen film "Into America's Wild."

Pan European Approach

Brand USA has initiated a pan-European approach that enables a fully integrated and consistent effort along both primary and secondary European markets. It also maximizes Brand USA's resources in those markets under the direction of a single European strategic director. It allows Brand USA to efficiently and effectively build a strong strategic network, identify and establish airline and other industry (hotels, car rentals, etc.) partnership opportunities, and further develops our relationships with U.S. stakeholders.

Brand USA Travel Week



During FY2020, we will expand our exclusive Brand USA Travel Week to include Europe and India. Brand USA Travel Week will be an integrated and immersive experience for both exhibitors and buyers, celebrating the United States.

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

Based on stakeholder feedback, Brand USA Travel Week Europe will be expanded into the future.

September 21- 25, 2020	London, United Kingdom
2021	Germany
2022	United Kingdom
2023	France
2024	United Kingdom
2025	Netherlands

The inaugural Brand USA Travel Week India will take place in Delhi from October 6-9, 2020.

Trade Shows

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

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

Brand USA pavilions provide exhibitors:

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

USA PAVILIONS AT INTERNATIONAL TRADE SHOWS

Event	Dates	Location
IFTM Top Resa	October 1-4, 2019	Paris
ITB Asia	October 16-18, 2019	Singapore
TEJ - JATA	October 24-27, 2019	Osaka
WTM	November 4-6, 2019	London
Festuris	November 8-11, 2019	Gramado
Valkantiebeurs*	January 14-19, 2020	Utrecht
Matka*	January 15-19, 2020	Helsinki
Discover America*	March 2, 2020	Denmark
ITB	March 4-8, 2020	Berlin
WTM Latin America	March 31-April 2, 2020	Sao Paulo
ITB	May 13-15, 2020	China
Brand USA Travel Week Europe	September 21- 25, 2020	London

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

Sales Missions and B2B Sessions

During FY2020, Brand USA will host a combination of sales missions and B2B sessions in eight international markets. Through these Brand USA-hosted events we will invite travel and tourism industry professionals in key markets to meet with U.S. organizations at designated international locations. Through a series of planned events, Brand USA and participating partners will connect directly with international travel buyers, including tour operators, airlines, travel agents, incentive and meeting planners. These connections will allow us to provide a more in-depth look at U.S. destinations and experiences in order to increase the quantity and diversity of travel bookings to the United States.

Market(s)	Sales Mission or B2B Session	Dates
Mexico	Sales Mission	January 13-17, 2020
Australia	B2B	February 20, 2020
New Zealand	Brand USA Travel Trade Expos	February 24-25, 2020
China	Sales Mission	March 23-28, 2020
Japan and South Korea	Sales Mission	June 2020

MegaFams and Other Familiarization Tours

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

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

Through Brand USA MegaFam experiences, travel agents and tour operators become better informed, empowered, and inspired to sell a multitude of U.S. destinations. MegaFams being planned for FY2020 include:

MegaFam	Dates
China	April 14-23, 2020
United Kingdom & Ireland	April 29 - May 6, 2020

Training Initiatives

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

USA Discovery Program



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

Training Seminars

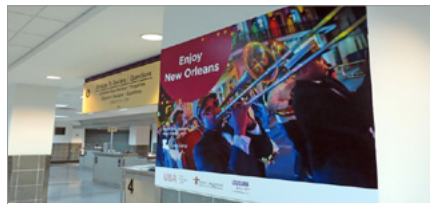
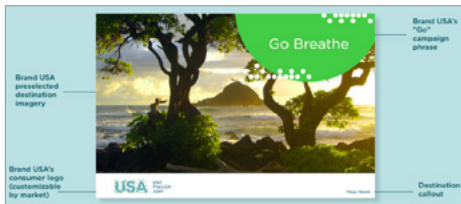
Brand USA will also present in-market training seminars to the travel trade that focus on a specific experience or region in the United States—providing a targeted approach to promoting U.S. travel destinations.

MEDIA AND PUBLIC RELATIONS (CONSUMER AND TRADE)



During FY2020 Brand USA will continue to increase its outreach to consumer and trade media to support its efforts to promote the entirety of the United States and will offer added value to partners through a number of programs that help increase awareness of the many unique experiences and range of destinations in the United States. Through the power and credibility of earned media coverage, Brand USA will inspire international travelers to visit the United States. Leveraging its access to and relationships with journalists, plus its online newsroom platform and ongoing scheduling of visiting journalist familiarization tours, Brand USA will promote destinations and travel experiences in every state, the District of Columbia, and the five territories with extensive media coverage in both travel trade and consumer media, including broadcast, print, and online. To help amplify and reinforce key marketing messages and initiatives, media pitches will support marketing efforts through messaging, timing, and markets.

FEDERAL PARTNER COLLABORATION



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

Developing joint promotions and communications to international travelers;

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



Market Profiles



Australia

2018 visitation: 1.36 million (+2.9% from 2017)

2018 spend: \$8.63 billion (+1.0% from 2017)

2019-2024 visitation forecast

2019: 1.35 million

2020: 1.38 million

2021: 1.43 million

2022: 1.49 million

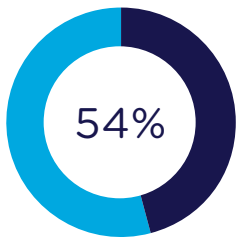
2023: 1.55 million

2024: 1.59 million

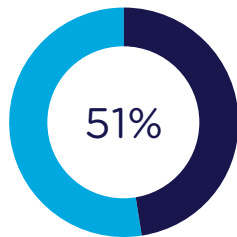


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

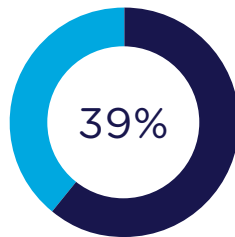
Top 5 Motivations for Selecting Last Intercontinental Destination



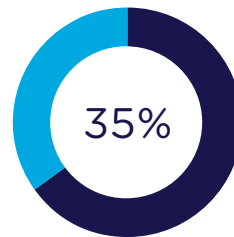
Cultural/historical attractions



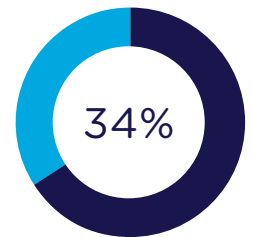
Local lifestyle



Shopping

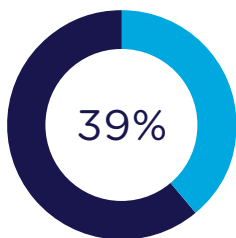


Dining/gastronomy

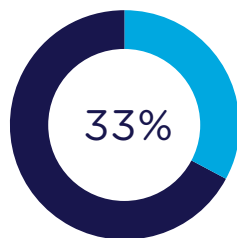


Urban attractions

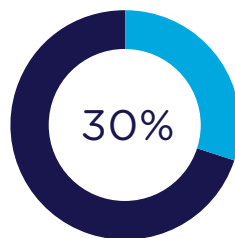
Top 5 Strongest Impressions of the USA



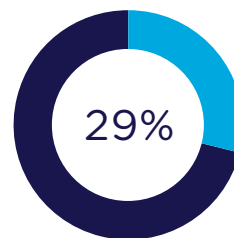
Diverse



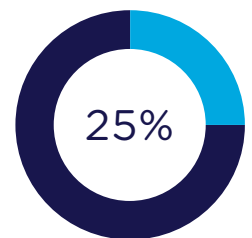
Adventurous



Friendly



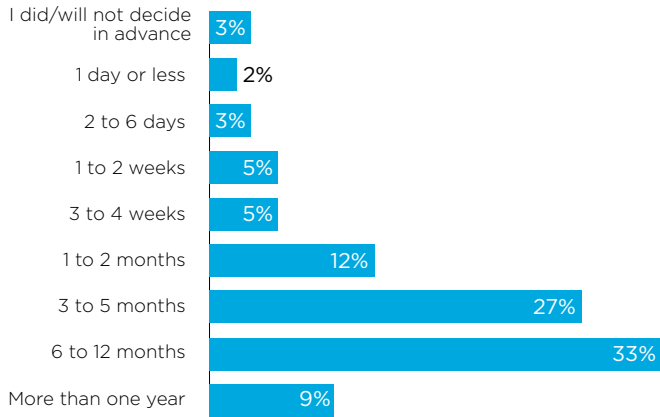
Arrogant



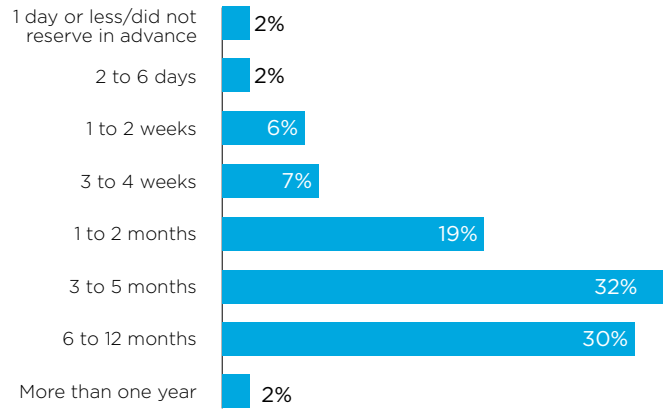
Energetic

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



58%

Websites via computer or laptop



37%

Personal recommendations from family or friends



27%

Websites or applications via mobile phone



22%

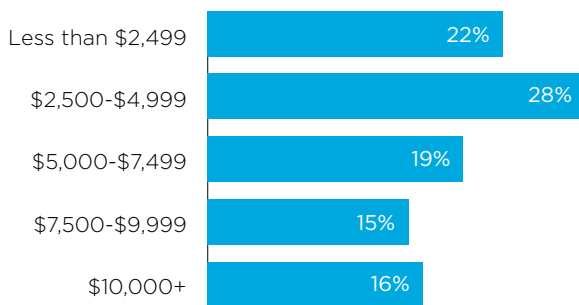
Websites or applications via tablet



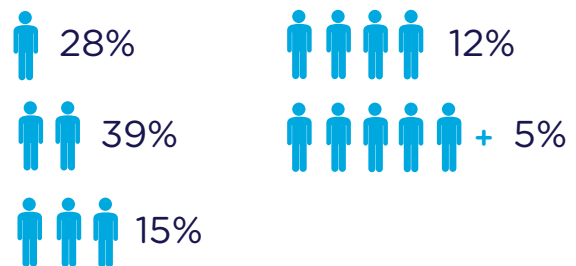
22%

Information in printed travel guidebooks

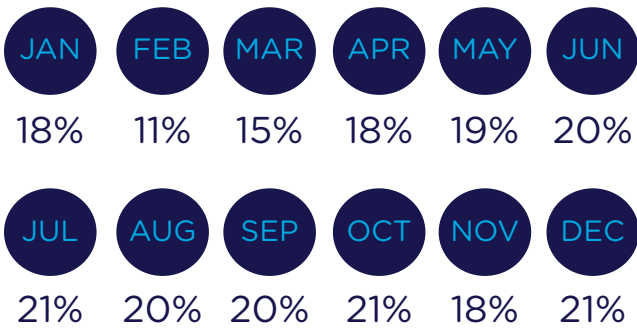
Expected Household Travel Spending for Next Intercontinental Trip



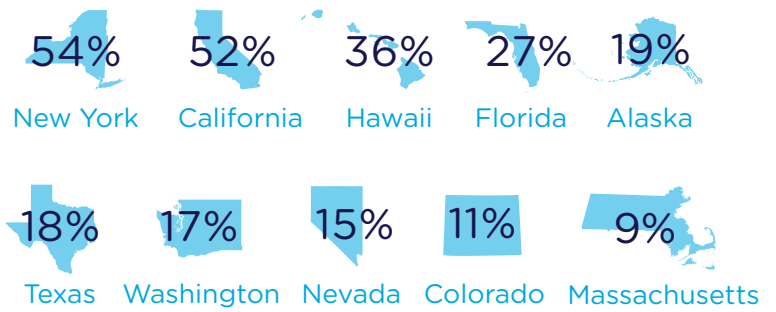
Expected Travel Party Size of Next Intercontinental Trip



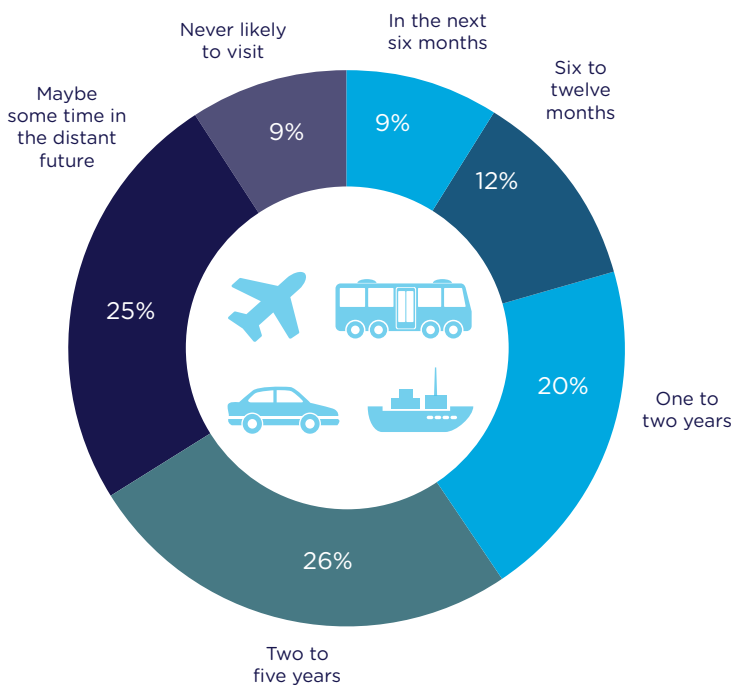
Months Traveled (March 2017–March 2019)



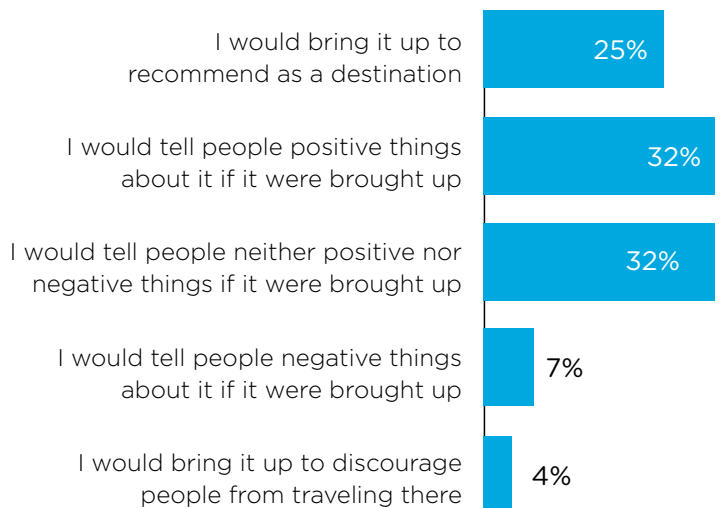
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 294,221 (+5.8% from 2017)

2018 spend: \$1.26 billion (+3.1 from 2017)

2019-2024 visitation forecast

2019: 281,777

2020: 273,154

2021: 279,755

2022: 276,063

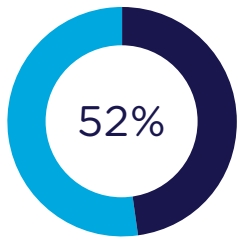
2023: 269,493

2024: 269,550

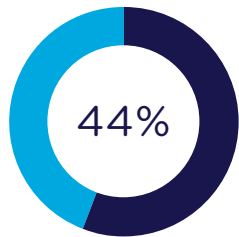


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

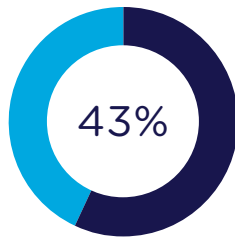
Top 5 Motivations for Selecting Last Intercontinental Destination



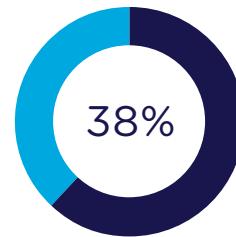
Cultural/historical attractions



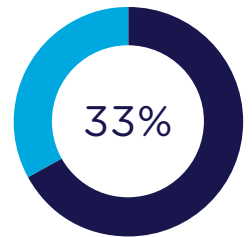
Local lifestyle



Beaches/seaside attractions

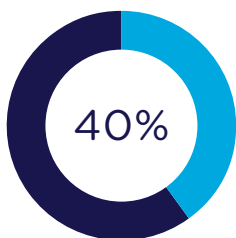


Ecotourism and nature

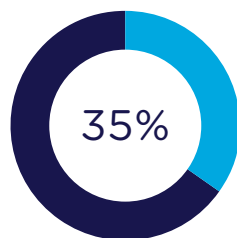


Urban attractions

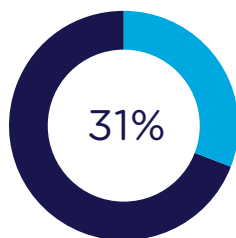
Top 5 Strongest Impressions of the USA



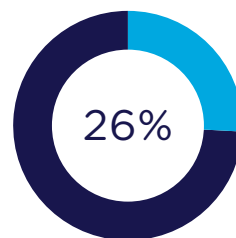
Diverse



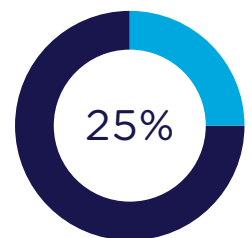
Adventurous



Trendy



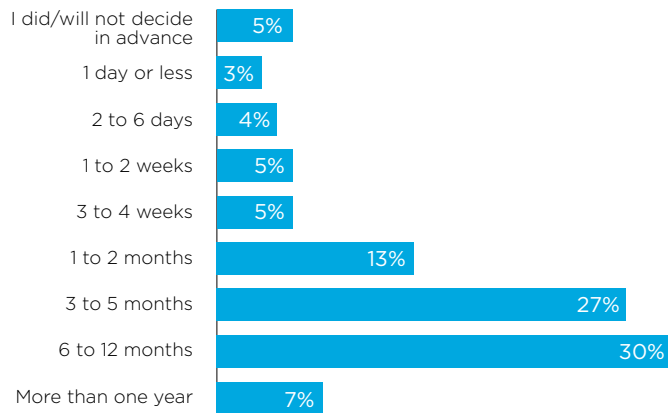
Energetic



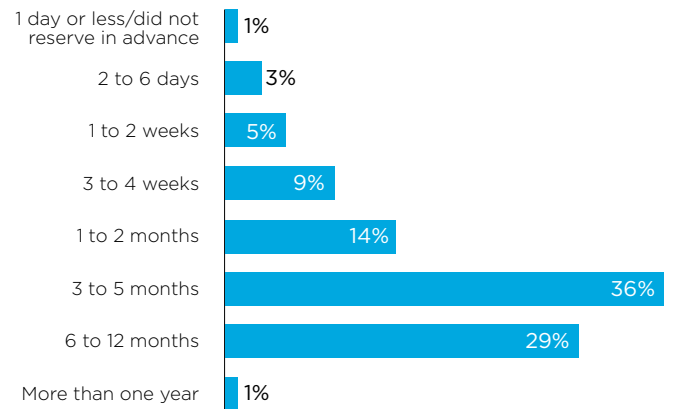
Arrogant

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



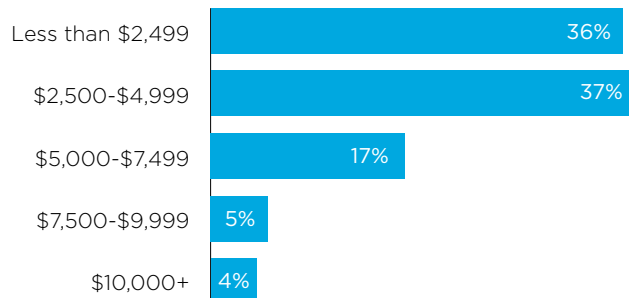
AIR BOOKING



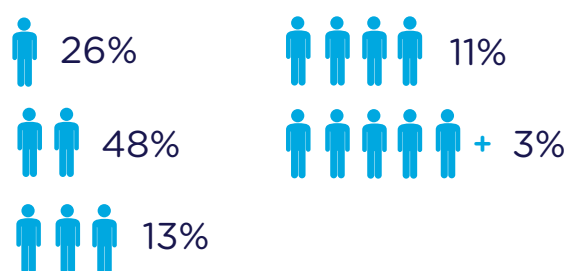
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



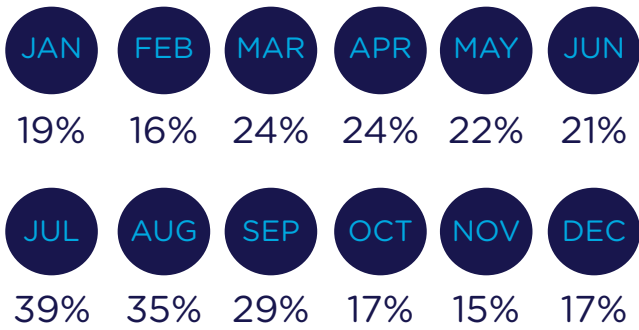
Expected Household Travel Spending for Next Intercontinental Trip



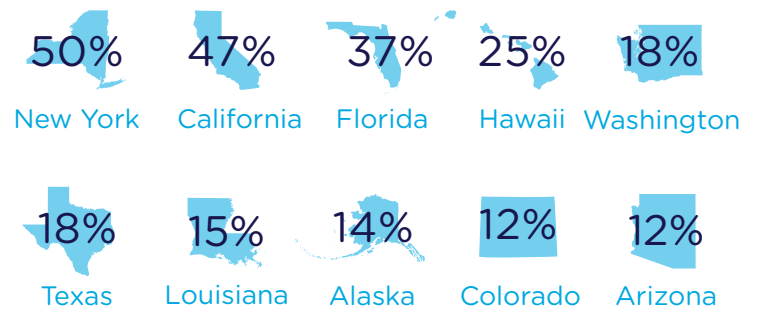
Expected Travel Party Size of Next Intercontinental Trip



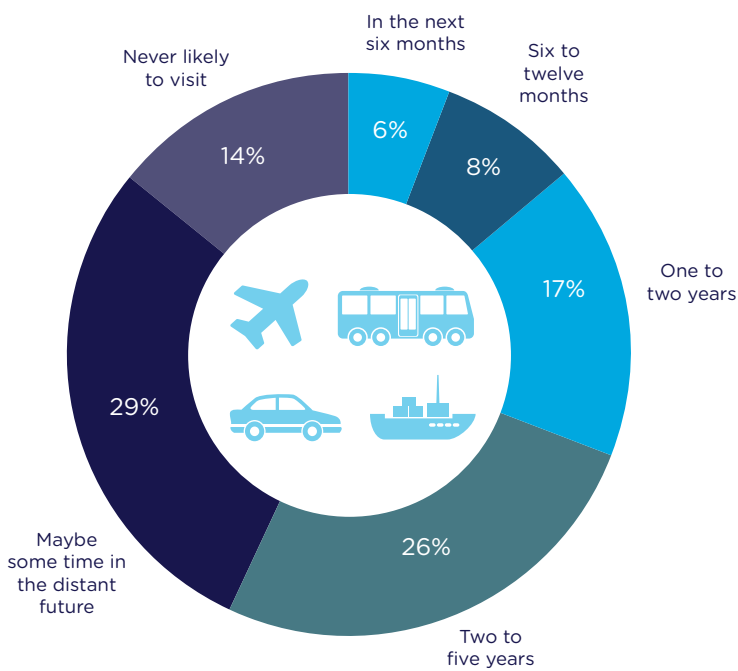
Months Traveled (March 2017–March 2019)



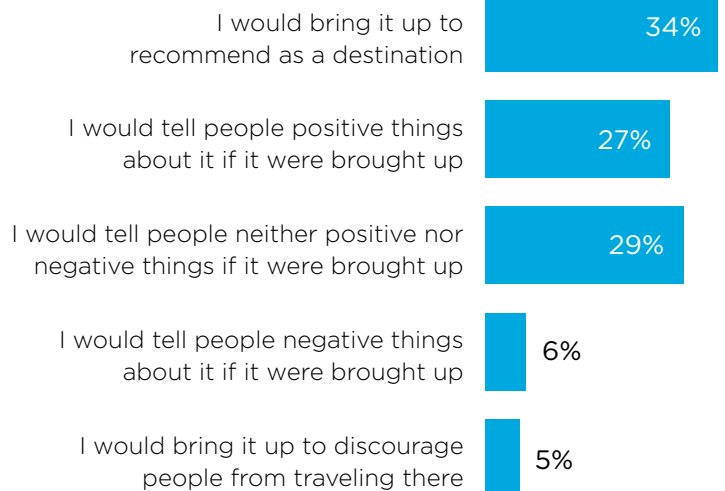
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.



Brazil

2018 visitation: 2.21 million (+15.5% from 2017)

2018 spend: \$12.30 billion (+6.3% from 2017)

2019-2024 visitation forecast

2019: 2.21 million

2020: 2.25 million

2021: 2.34 million

2022: 2.44 million

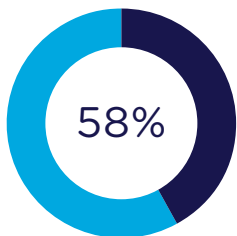
2023: 2.51 million

2024: 2.61 million

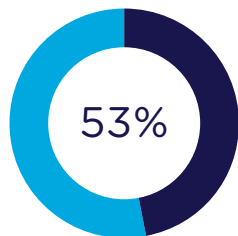


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

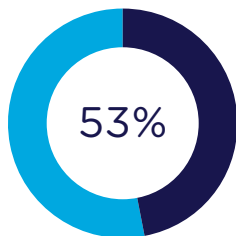
Top 5 Motivations for Selecting Last Intercontinental Destination



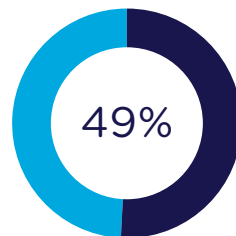
Cultural/historical attractions



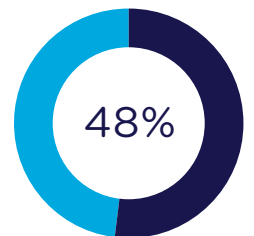
Local lifestyle



Shopping

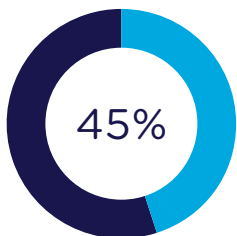


Dining/gastronomy

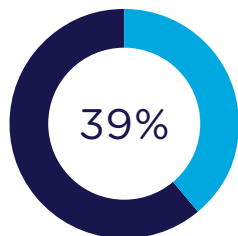


Urban attractions

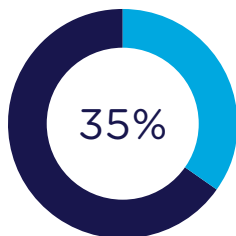
Top 5 Strongest Impressions of the USA



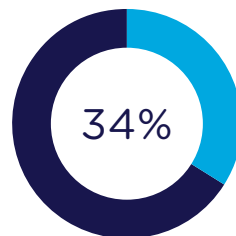
Diverse



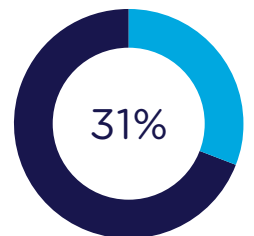
Sophisticated



Down-to-earth



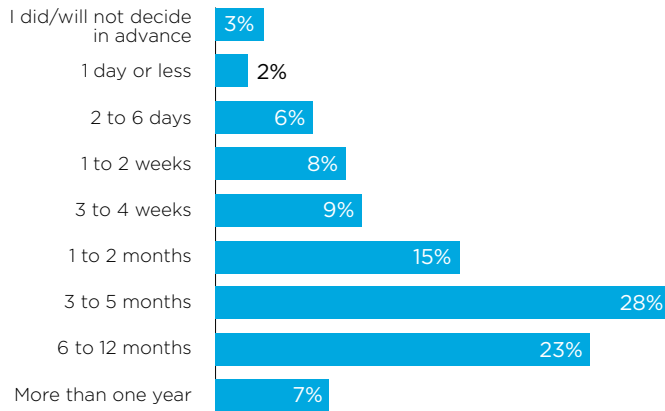
Creative



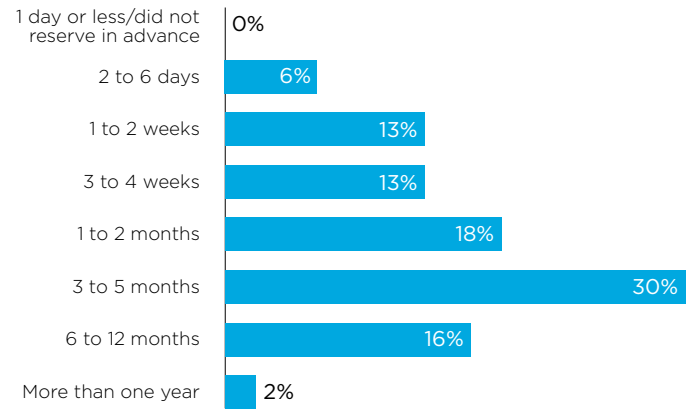
Energetic

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



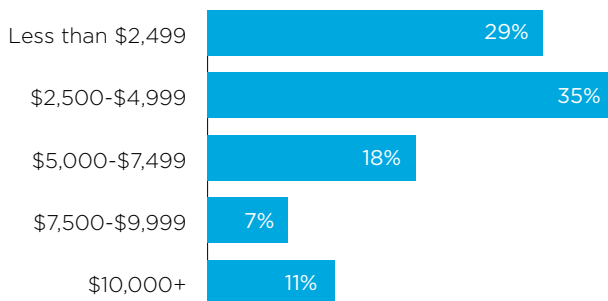
AIR BOOKING



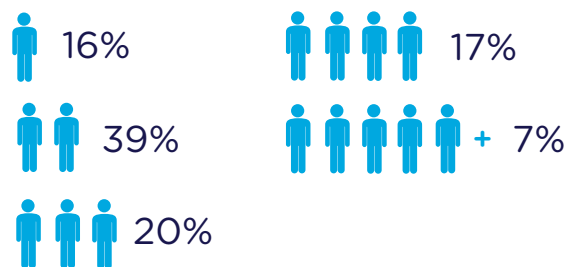
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



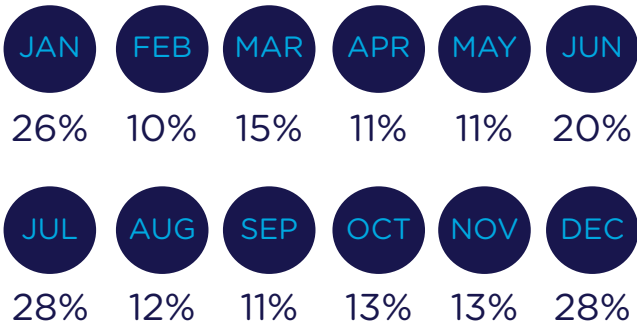
Expected Household Travel Spending for Next Intercontinental Trip



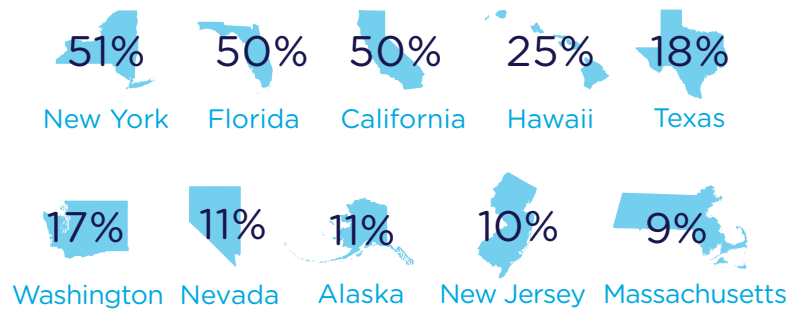
Expected Travel Party Size of Next Intercontinental Trip



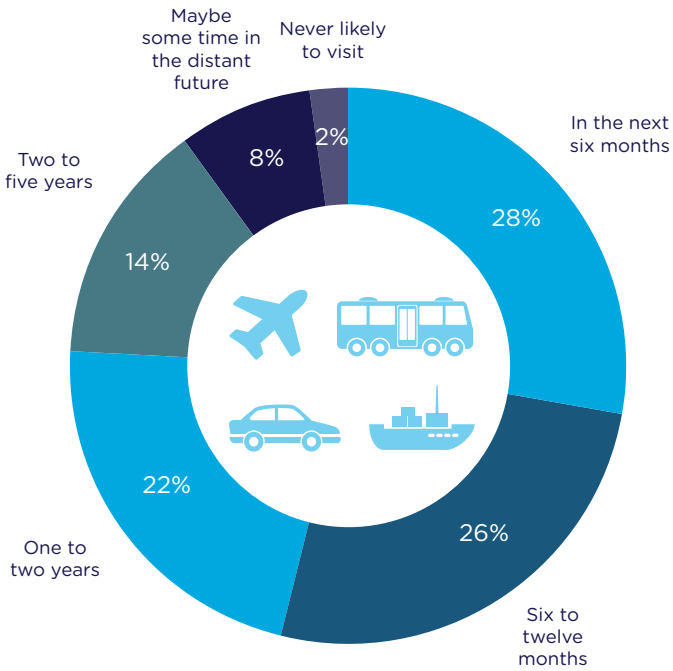
Months Traveled (March 2017–March 2019)



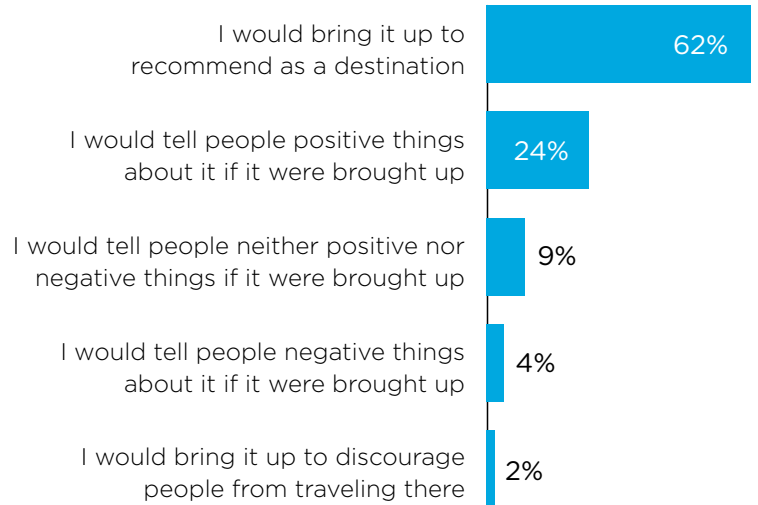
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 21.48 million* (+4.8% from 2017)

2018 spend: \$22.16 billion (+5.0% from 2017)

2019-2024 visitation forecast

2019: 20.83 million

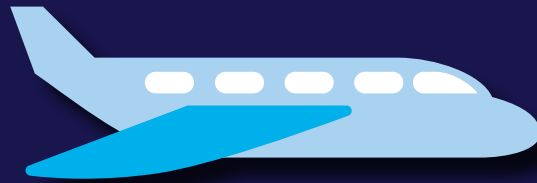
2020: 21.46 million

2021: 21.89 million

2022: 22.54 million

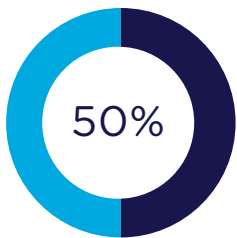
2023: 23.44 million

2024: 24.38 million

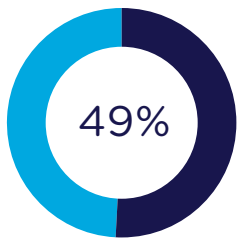


*Note: Total spending for 2018 might change due to this actual visitation volume, released as part of the forecast
 Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

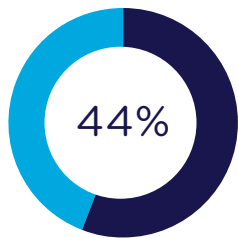
Top 5 Motivations for Selecting Last Intercontinental Destination



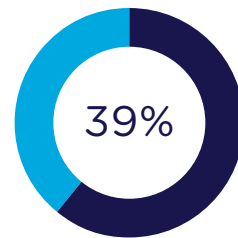
Cultural/historical attractions



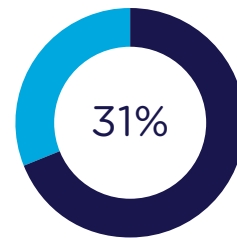
Beaches/seaside attractions



Local lifestyle

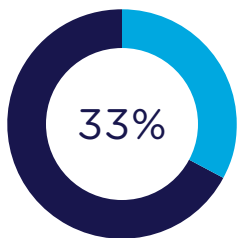


Dining/gastronomy

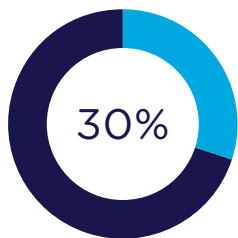


Urban attractions

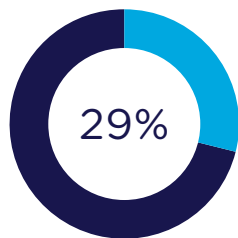
Top 5 Strongest Impressions of the USA



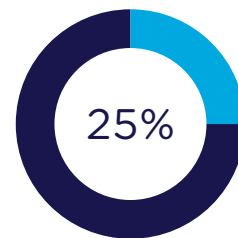
Diverse



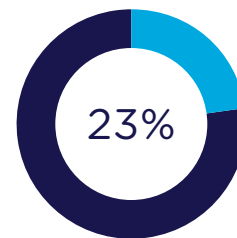
Arrogant



Adventurous



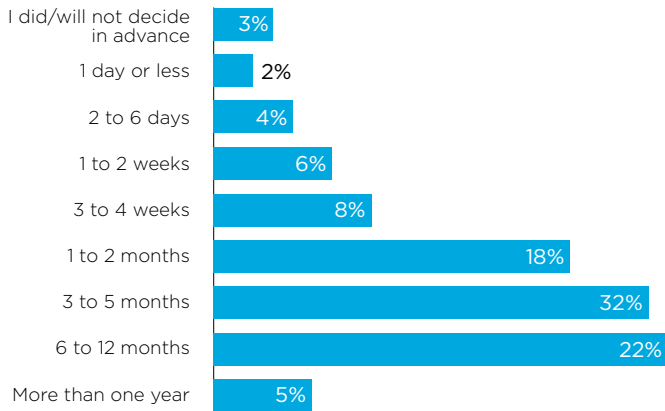
Friendly



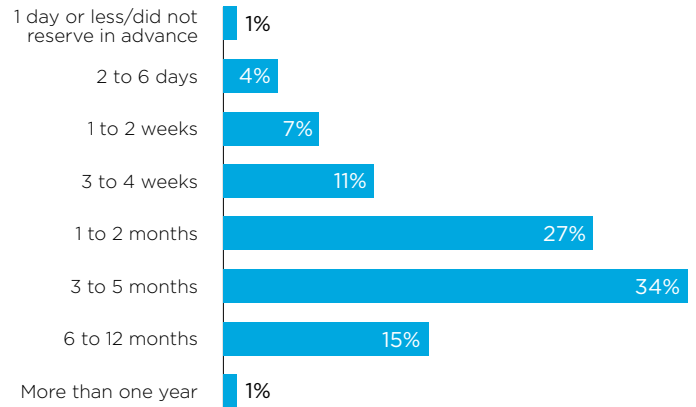
Energetic

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



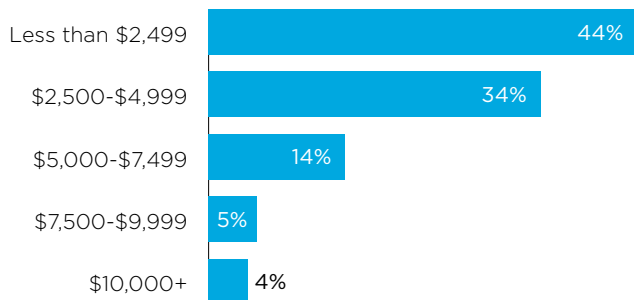
AIR BOOKING



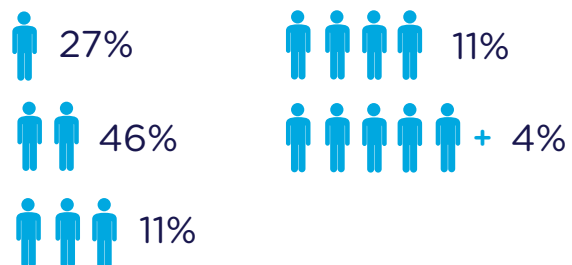
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



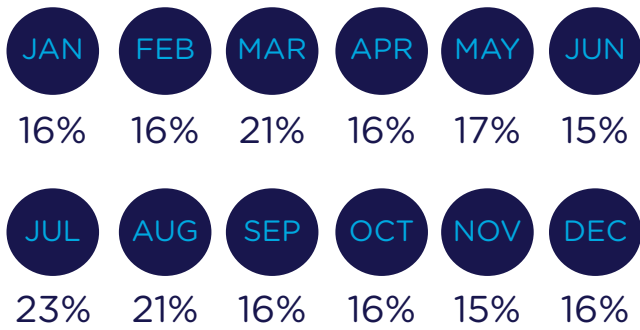
Expected Household Travel Spending for Next Intercontinental Trip



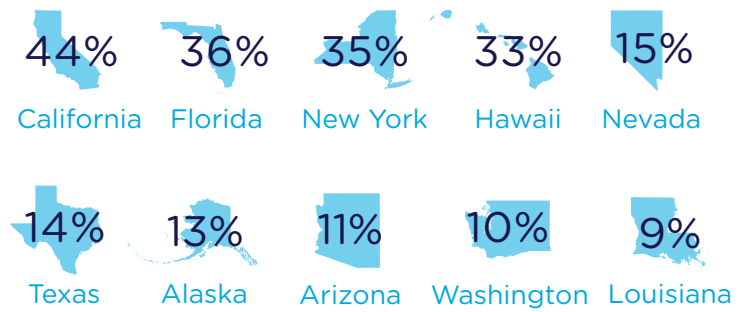
Expected Travel Party Size of Next Intercontinental Trip



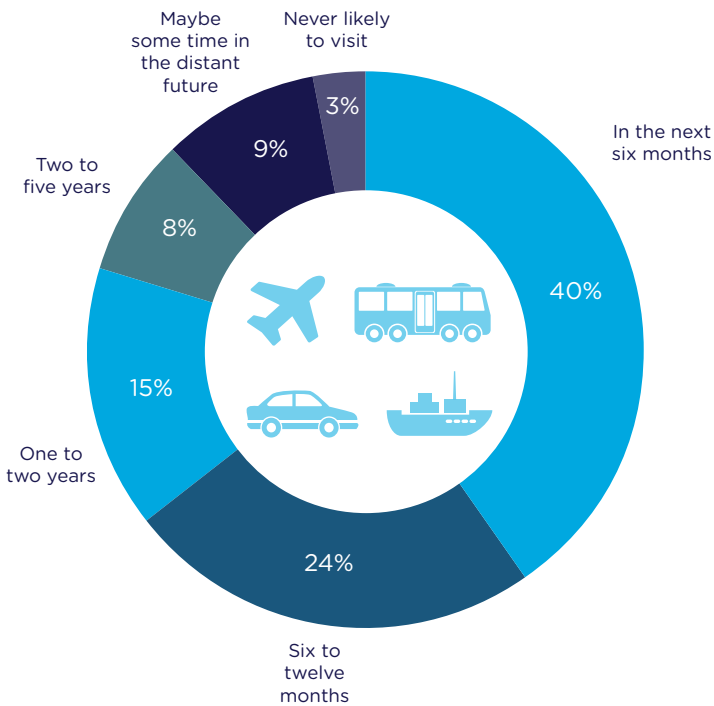
Months Traveled (March 2017–March 2019)



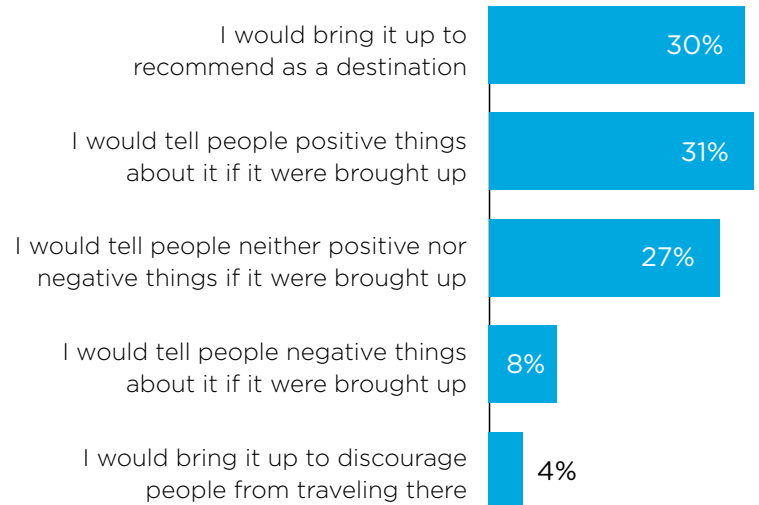
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 2.99 million* (-5.7% from 2017)

2018 spend: \$34.63 billion (-2.0% from 2017)

2019-2024 visitation forecast

2019: 2.84 million

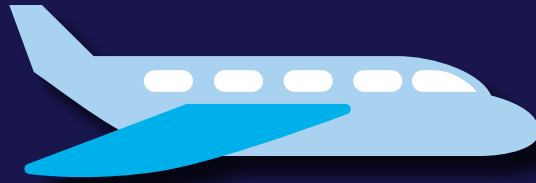
2020: 2.87 million

2021: 2.99 million

2022: 3.14 million

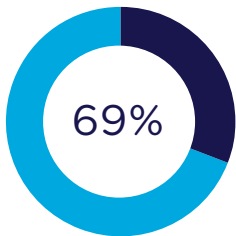
2023: 3.32 million

2024: 3.52 million

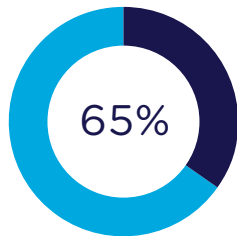


*Note: Total spending for 2018 might change due to this actual visitation volume, released as part of the forecast
Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

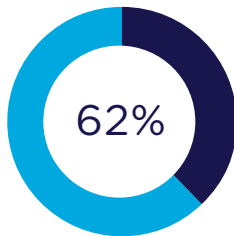
Top 5 Motivations for Selecting Last Intercontinental Destination



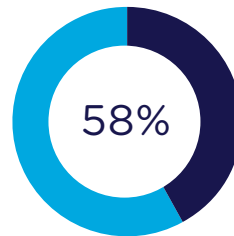
Cultural/historical attractions



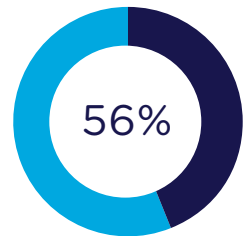
Ecotourism and nature



Urban attractions

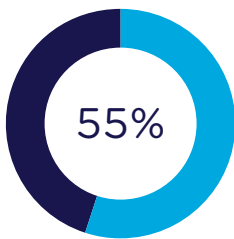


Dining/gastronomy

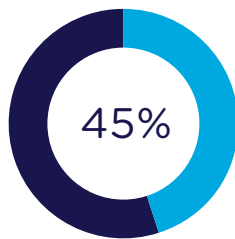


Beaches/seaside attractions

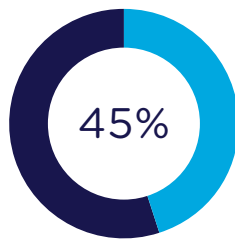
Top 5 Strongest Impressions of the USA



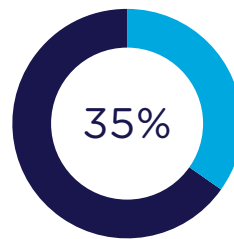
Diverse



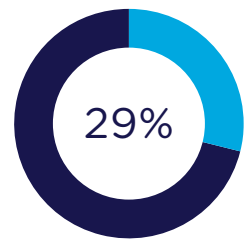
Open-minded



Energetic



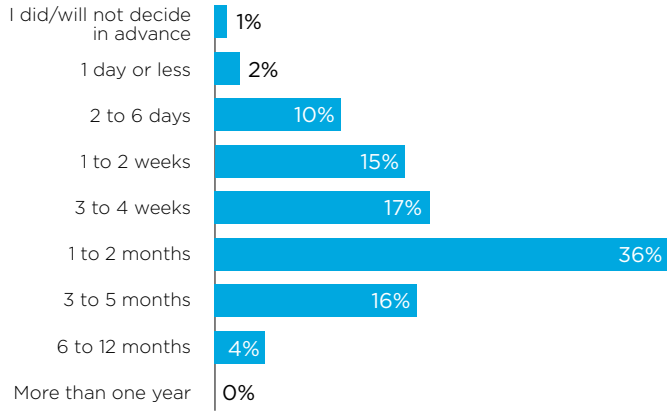
Creative



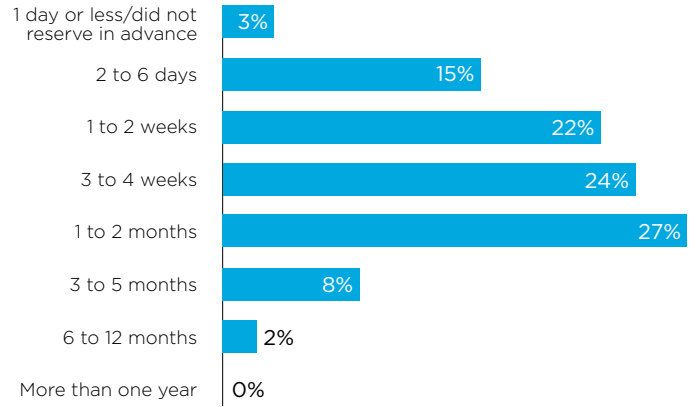
Adventurous

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



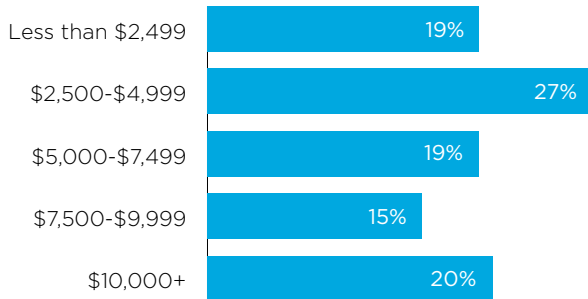
AIR BOOKING



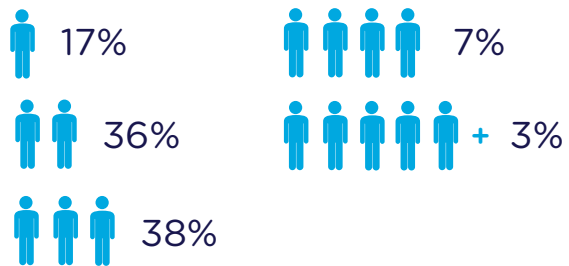
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



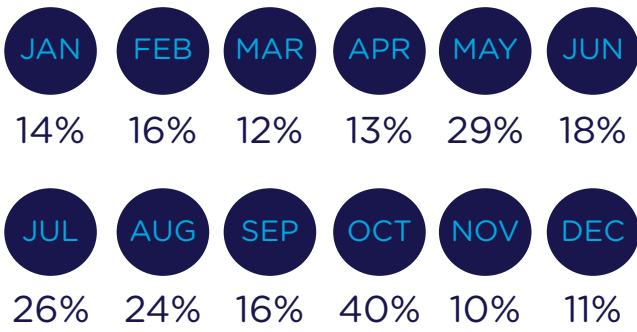
Expected Household Travel Spending for Next Intercontinental Trip



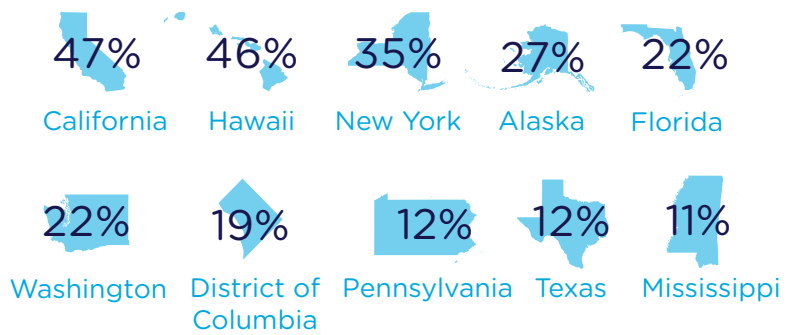
Expected Travel Party Size of Next Intercontinental Trip



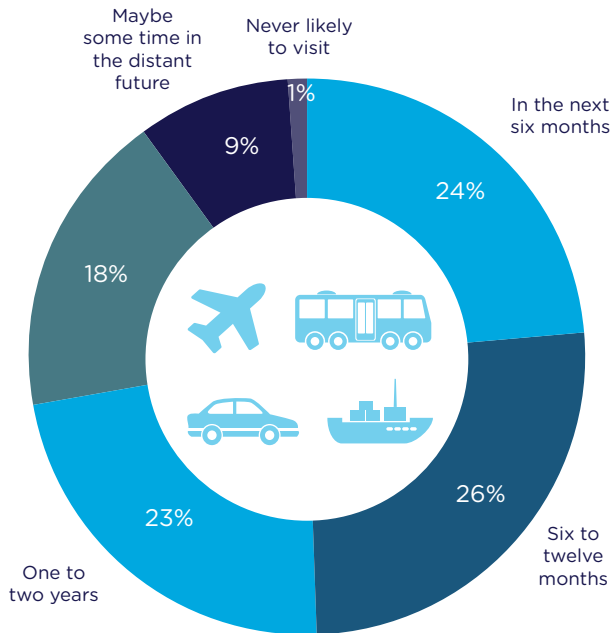
Months Traveled (March 2017–March 2019)



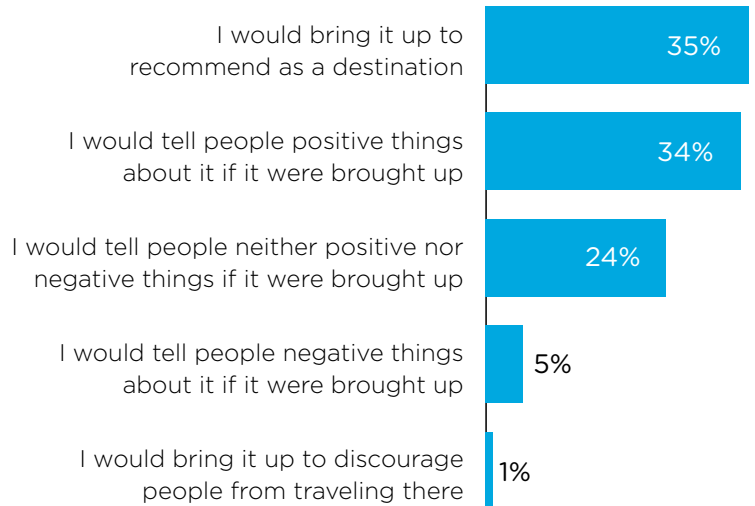
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 1.77 million (+6.0% from 2017)

2018 spend: \$6.41 billion (+3.7% from 2017)

2019-2024 visitation forecast

2019: 1.86 million

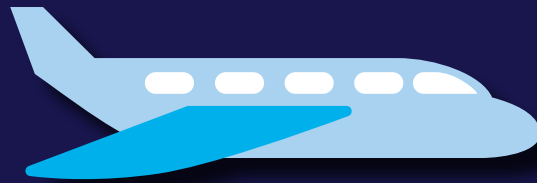
2020: 1.93 million

2021: 2.01 million

2022: 2.01 million

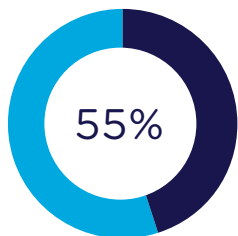
2023: 2.13 million

2024: 2.22 million

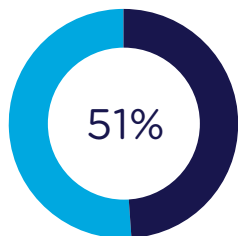


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

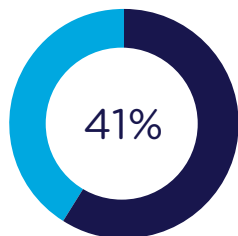
Top 5 Motivations for Selecting Last Intercontinental Destination



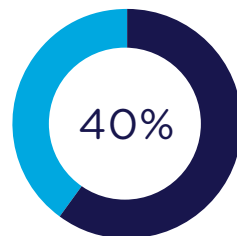
Local lifestyle



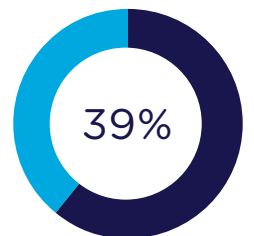
Cultural/historical attractions



Urban attractions

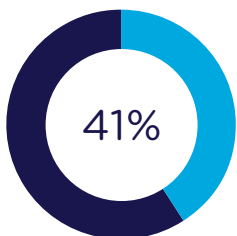


Ecotourism and nature

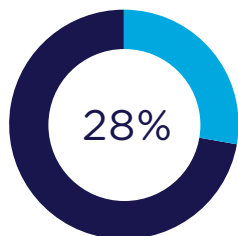


Dining/gastronomy

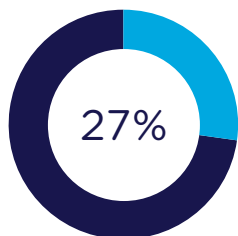
Top 5 Strongest Impressions of the USA



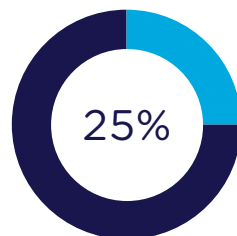
Diverse



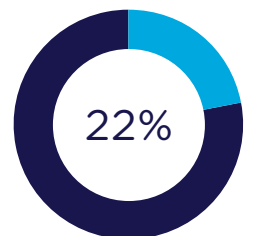
Adventurous



Trendy



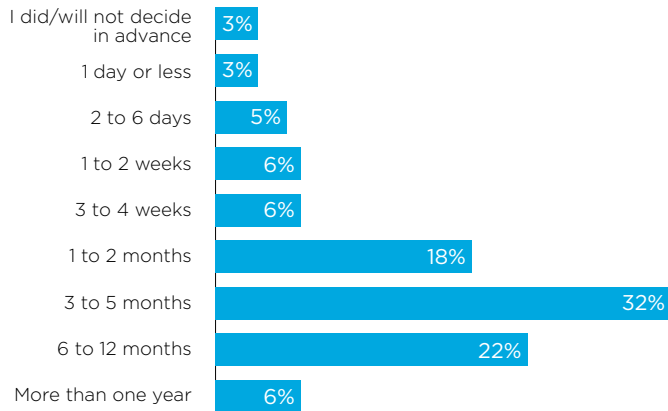
Forward-thinking



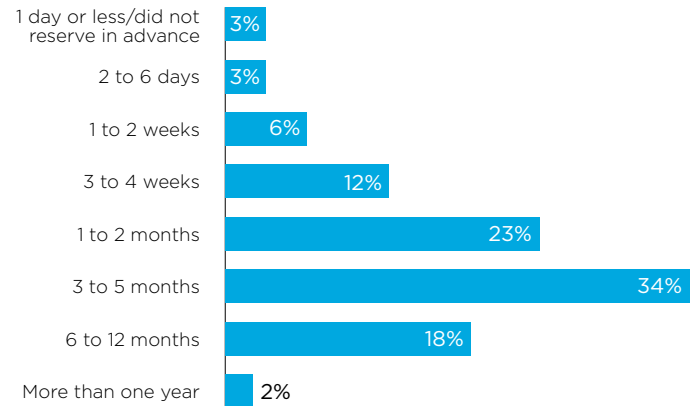
Open-minded

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



49%

Websites via computer or laptop



35%

Personal recommendations from family or friends



29%

Information in printed travel guidebooks



23%

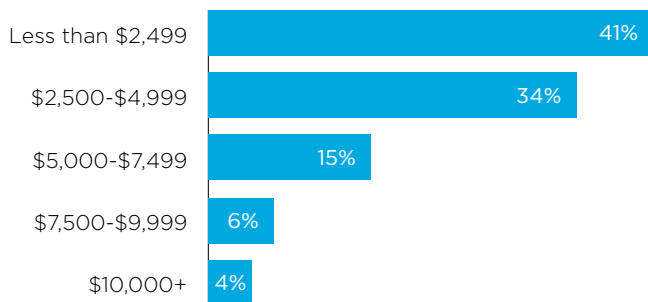
Websites or applications via mobile phone



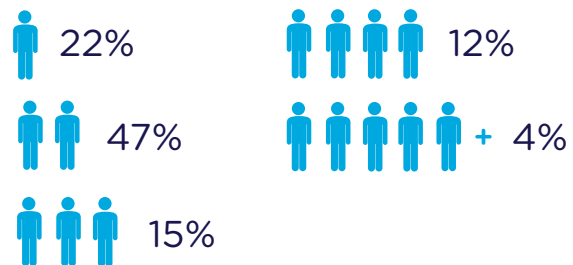
23%

Websites or applications via tablet

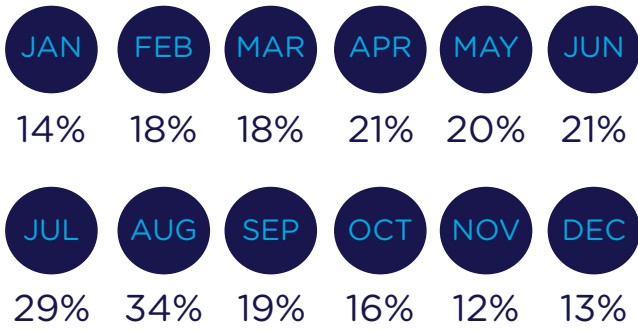
Expected Household Travel Spending for Next Intercontinental Trip



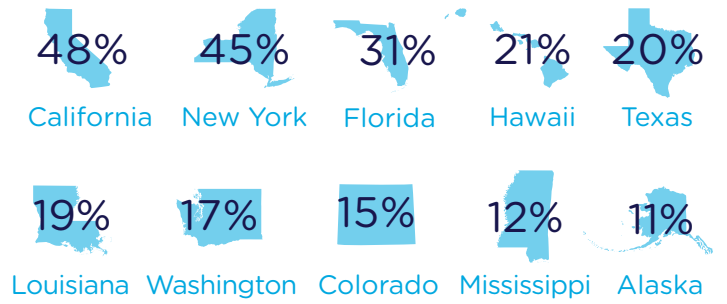
Expected Travel Party Size of Next Intercontinental Trip



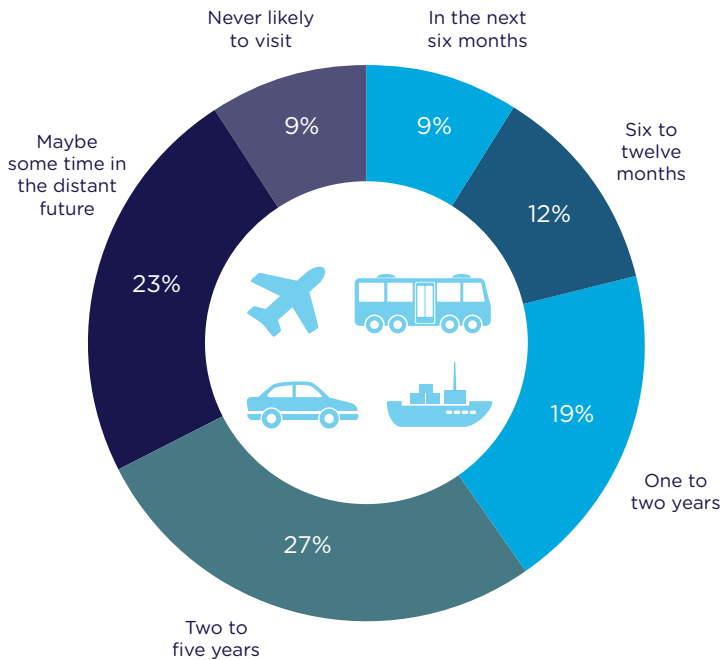
Months Traveled (March 2017–March 2019)



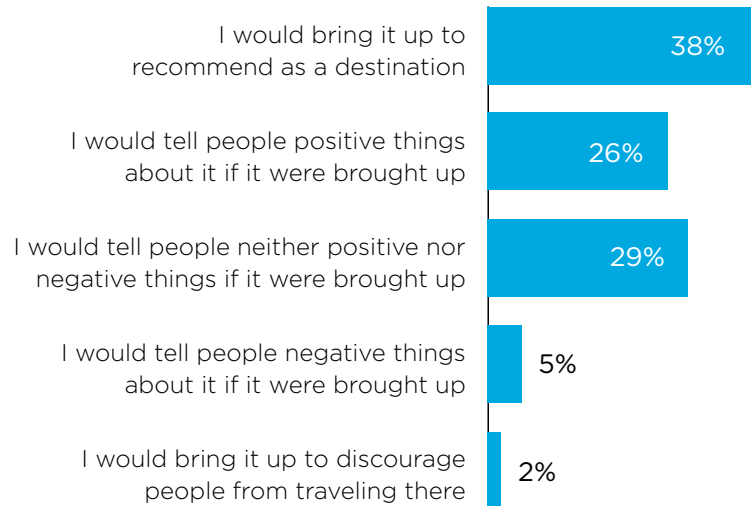
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.



Germany

2018 visitation: 2.06 million (-0.9% from 2017)

2018 spend: \$8.28 billion (+0.5% from 2017)

2019-2024 visitation forecast

2019: 2.06 million

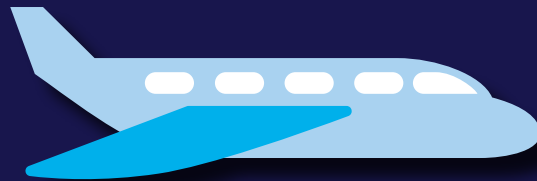
2020: 2.08 million

2021: 2.13 million

2022: 2.17 million

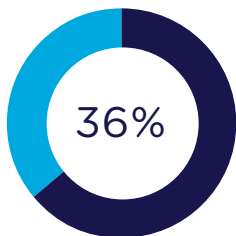
2023: 2.21 million

2024: 2.26 million

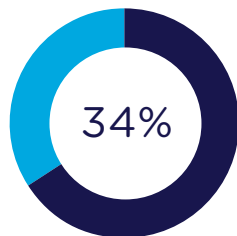


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

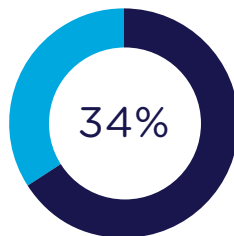
Top 5 Motivations for Selecting Last Intercontinental Destination



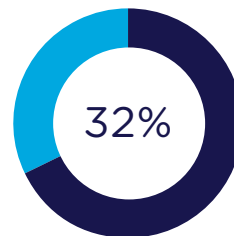
Dining/gastronomy



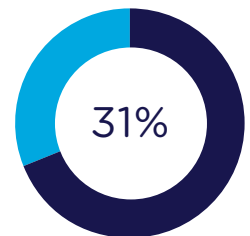
Cultural/historical attractions



Ecotourism and nature

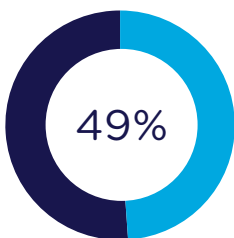


Urban attractions

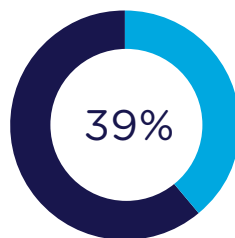


Shopping

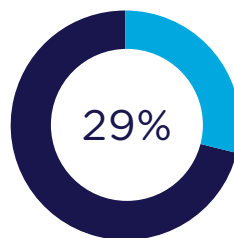
Top 5 Strongest Impressions of the USA



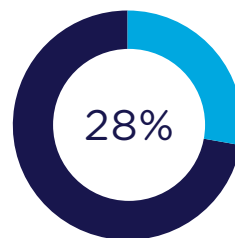
Diverse



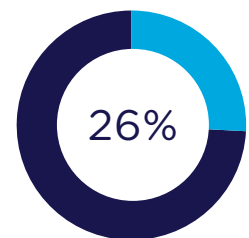
Adventurous



Energetic



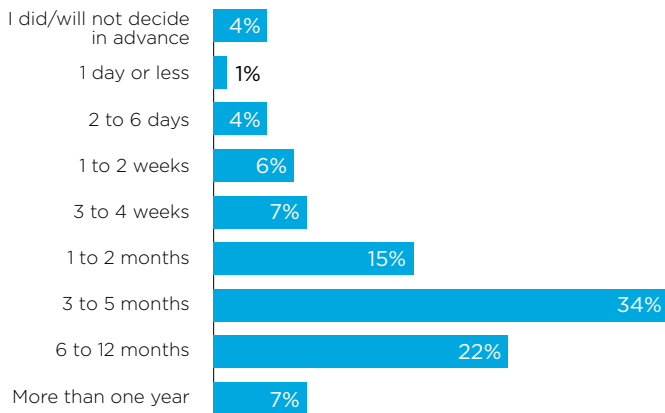
Forward-thinking



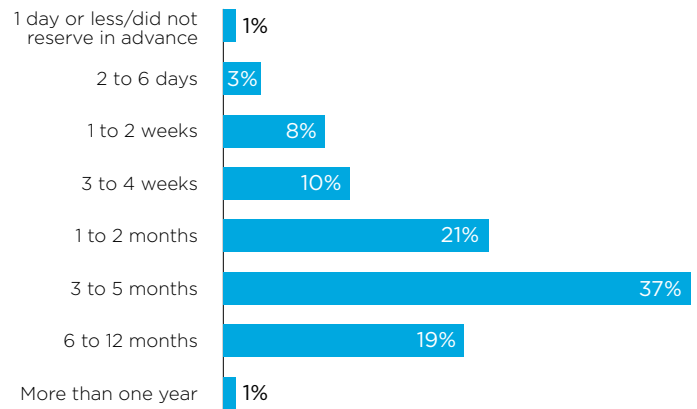
Friendly

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



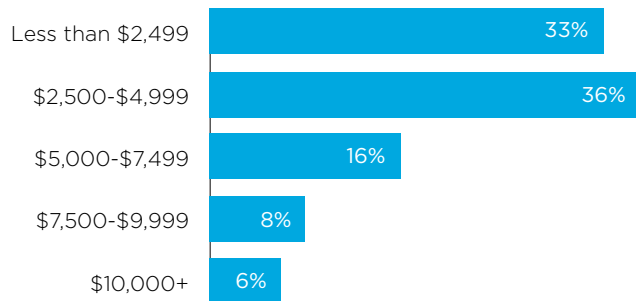
AIR BOOKING



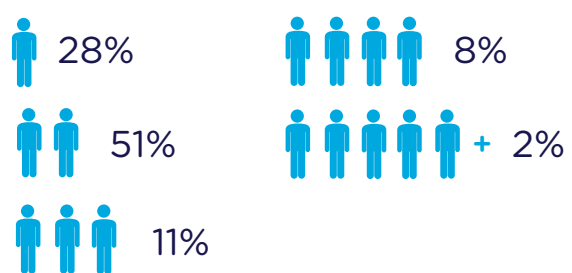
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



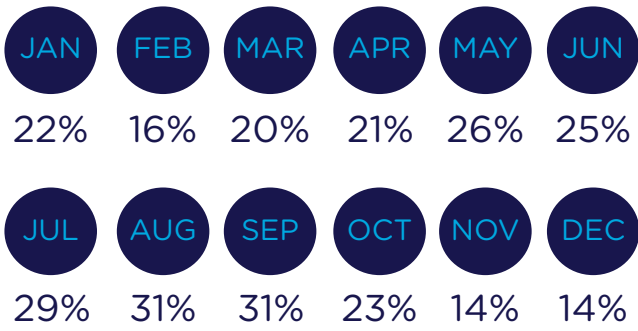
Expected Household Travel Spending for Next Intercontinental Trip



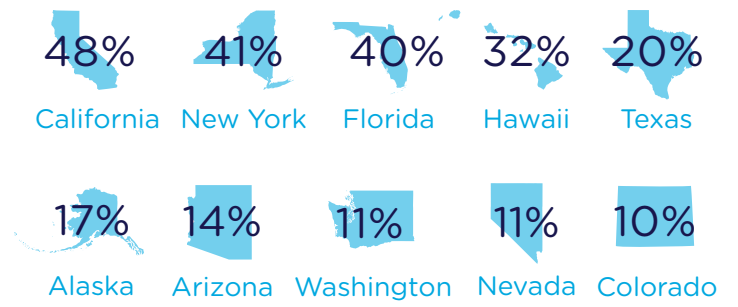
Expected Travel Party Size of Next Intercontinental Trip



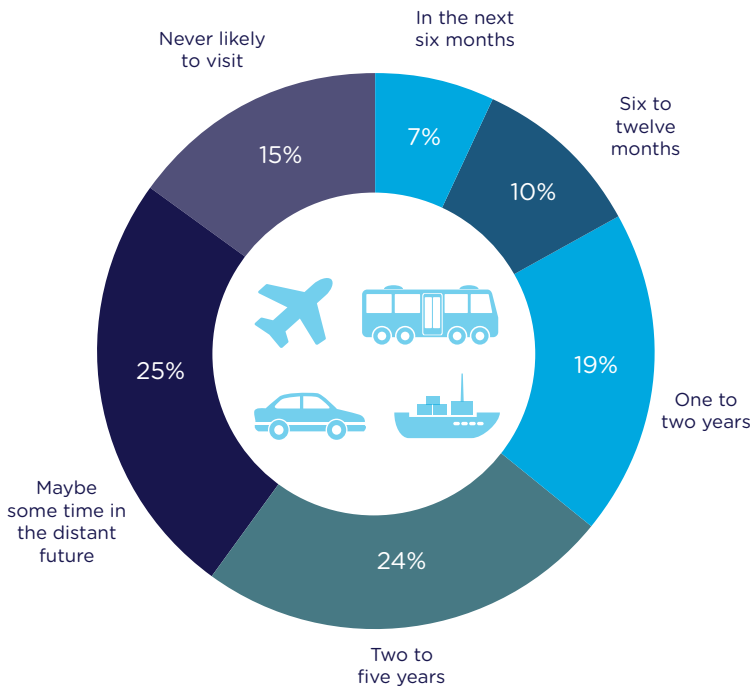
Months Traveled (March 2017–March 2019)



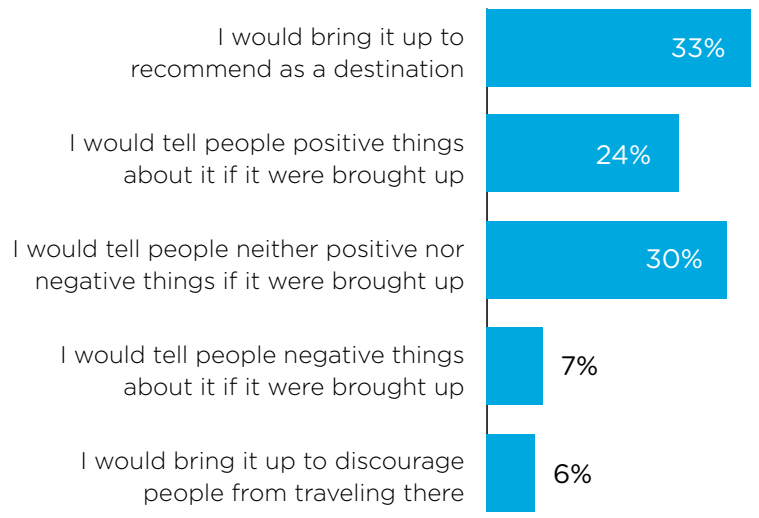
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 1.38 million (+7.2% from 2017)

2018 spend: \$15.76 billion (+7.3% from 2017)

2019-2024 visitation forecast

2019: 1.43 million

2020: 1.53 million

2021: 1.63 million

2022: 1.71 million

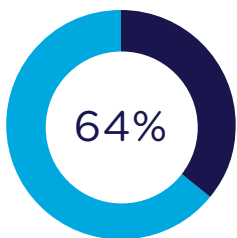
2023: 1.79 million

2024: 1.88 million

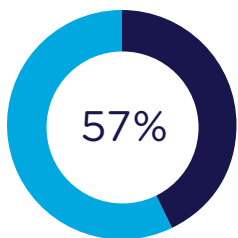


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

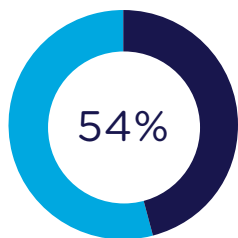
Top 5 Motivations for Selecting Last Intercontinental Destination



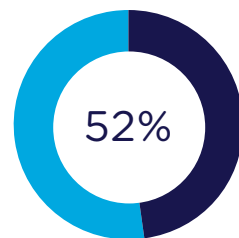
Beaches/seaside attractions



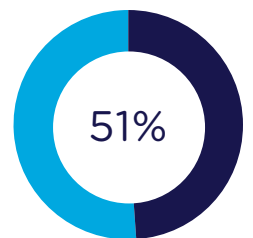
Shopping



Urban Attractions

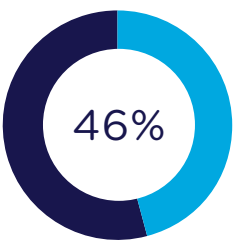


Cultural/historical attractions

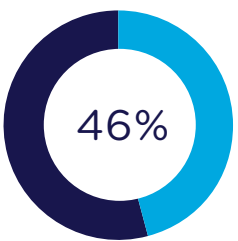


Local lifestyle

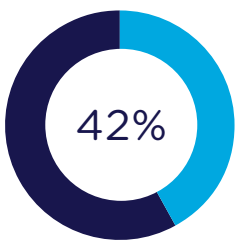
Top 5 Strongest Impressions of the USA



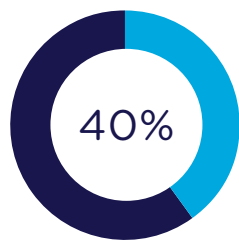
Friendly



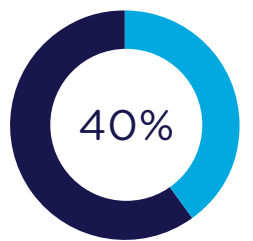
Energetic



Open-minded



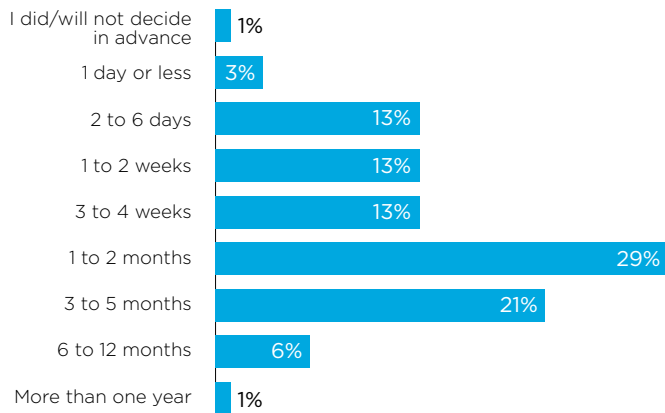
Trendy



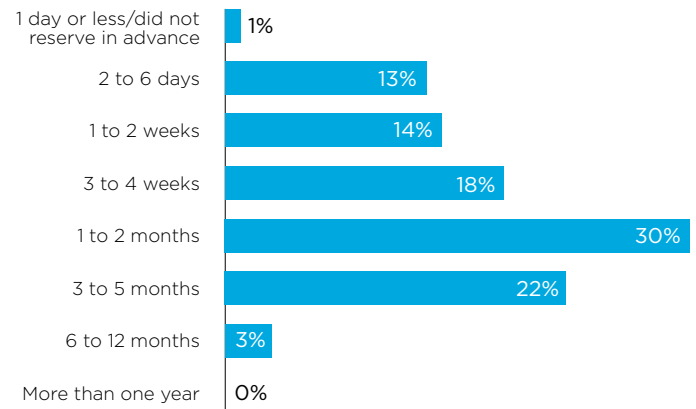
Adventurous

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



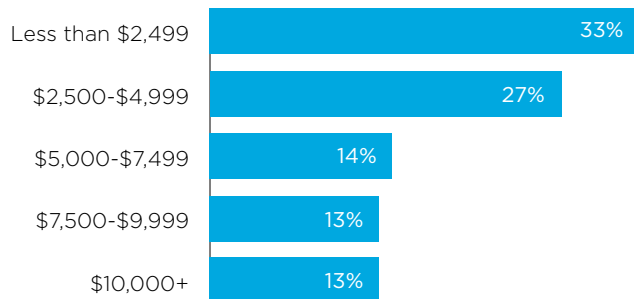
AIR BOOKING



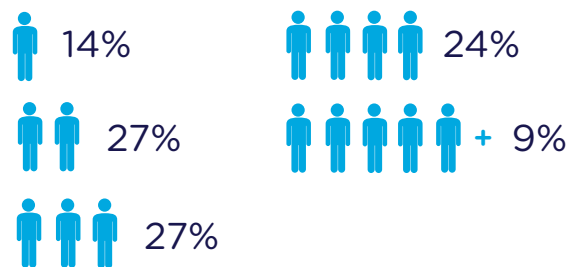
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



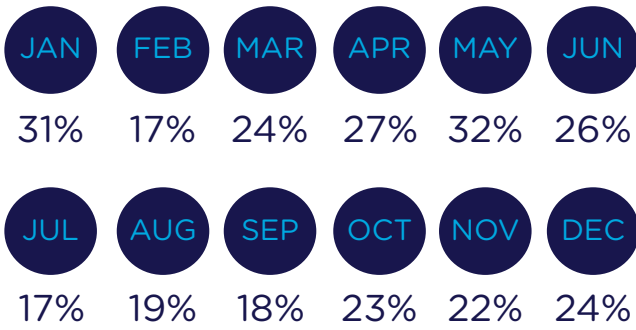
Expected Household Travel Spending for Next Intercontinental Trip



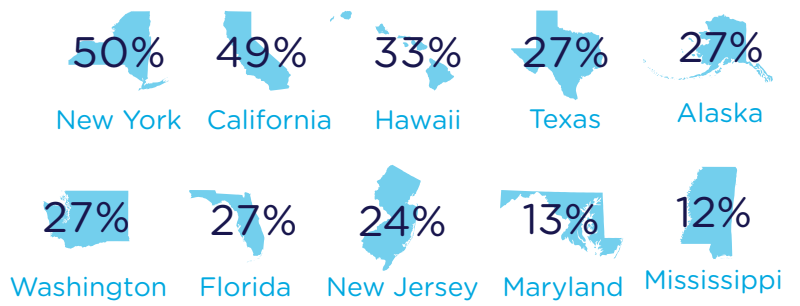
Expected Travel Party Size of Next Intercontinental Trip



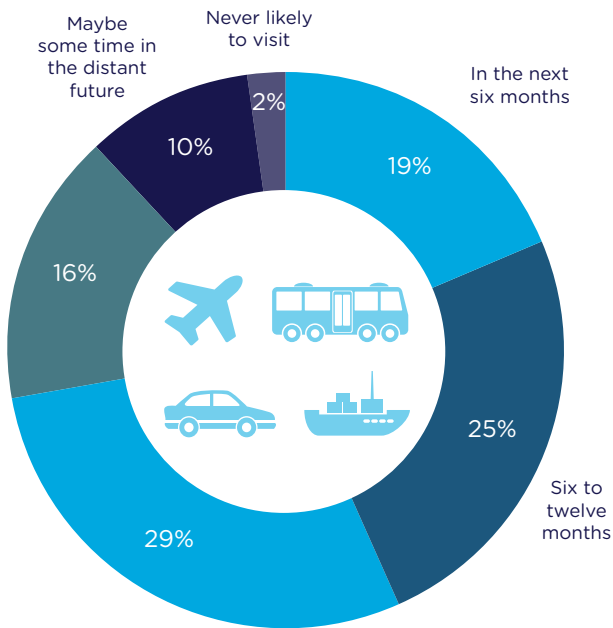
Months Traveled (March 2017–March 2019)



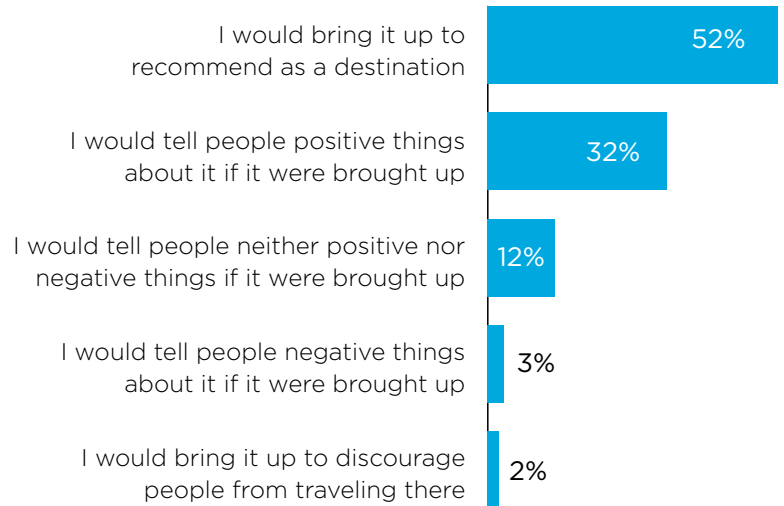
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 1.07 million (+4.0% from 2017)

2018 spend: \$4.37 billion (+4.5% from 2017)

2019-2024 visitation forecast

2019: 1.10 million

2020: 1.12 million

2021: 1.14 million

2022: 1.16 million

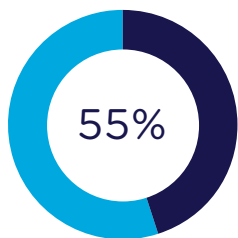
2023: 1.19 million

2024: 1.21 million

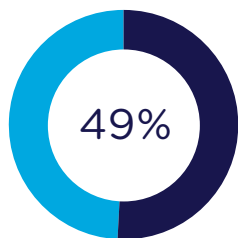


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

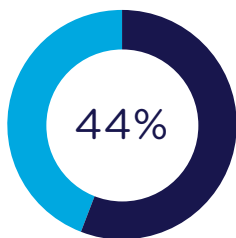
Top 5 Motivations for Selecting Last Intercontinental Destination



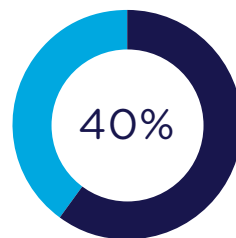
Cultural/historical attractions



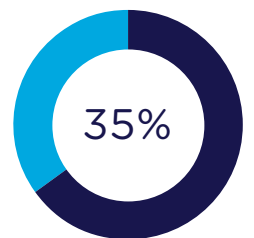
Local lifestyle



Beaches/seaside attractions

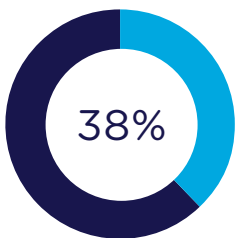


Ecotourism and nature

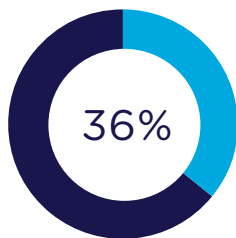


Urban attractions

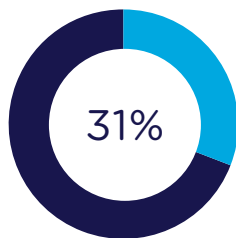
Top 5 Strongest Impressions of the USA



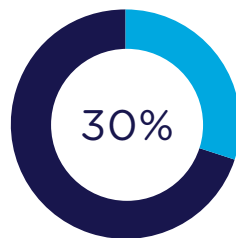
Forward-thinking



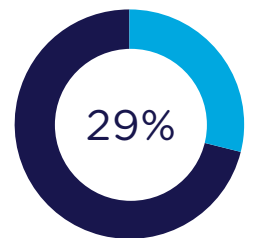
Energetic



Trendy



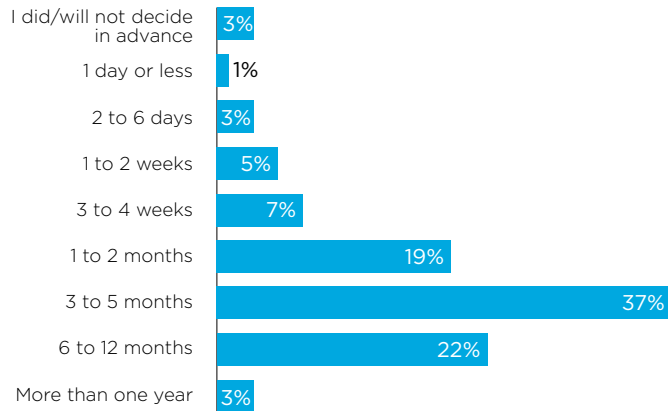
Adventurous



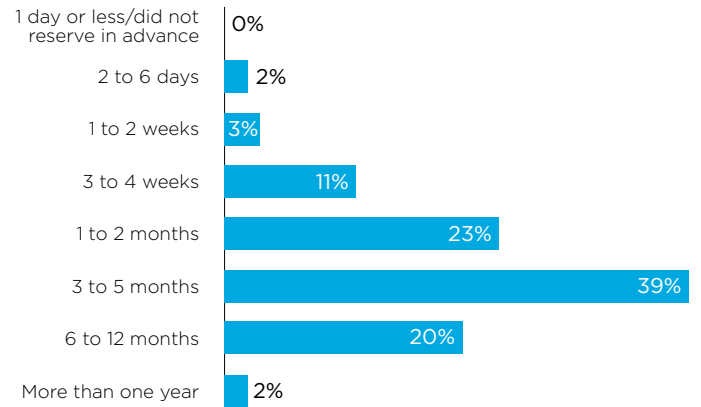
Unexpected

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



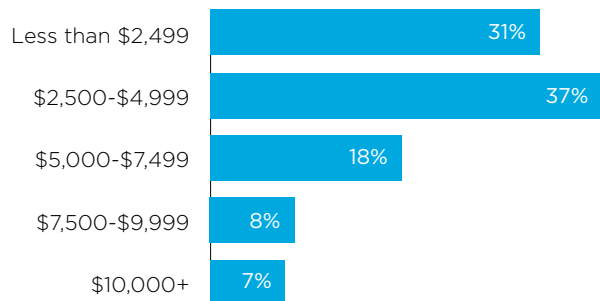
AIR BOOKING



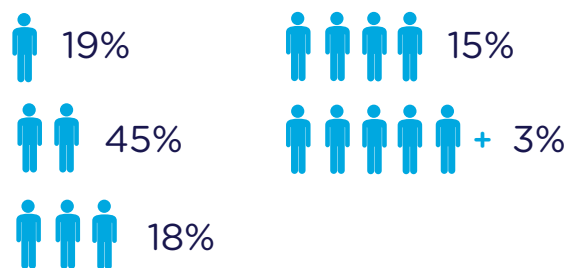
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



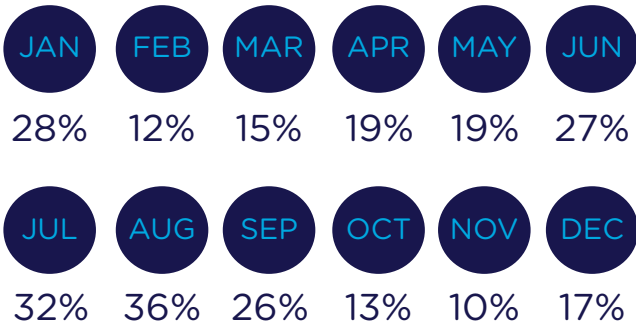
Expected Household Travel Spending for Next Intercontinental Trip



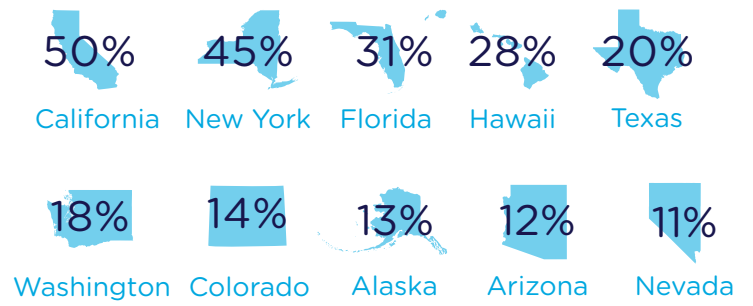
Expected Travel Party Size of Next Intercontinental Trip



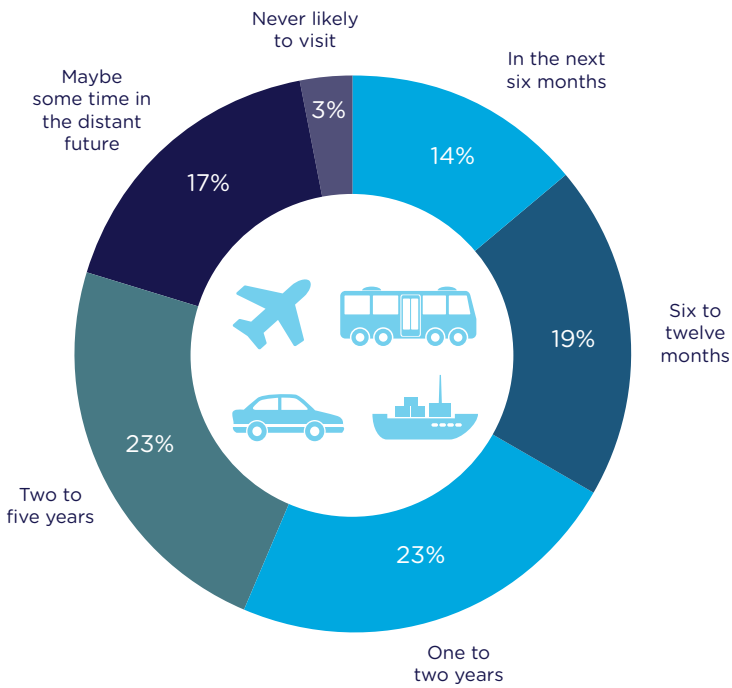
Months Traveled (March 2017–March 2019)



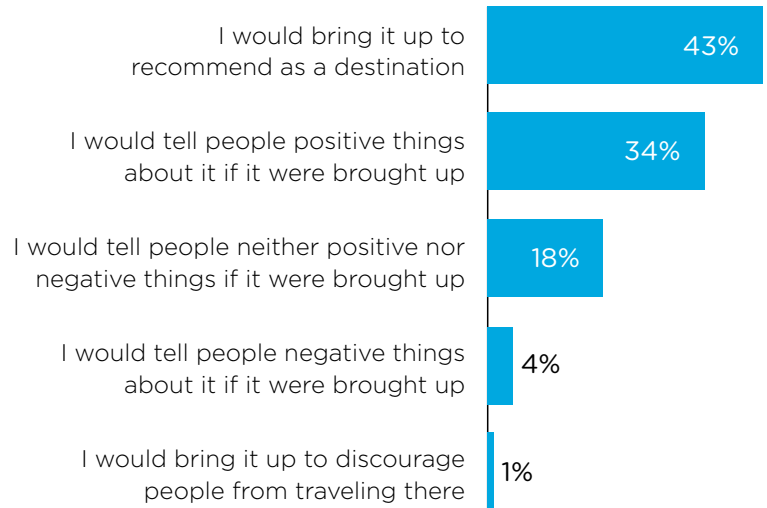
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 3.49 million (-2.8% from 2017)

2018 spend: \$16.28 million (-2.6% from 2017)

2019-2024 visitation forecast

2019: 3.67 million

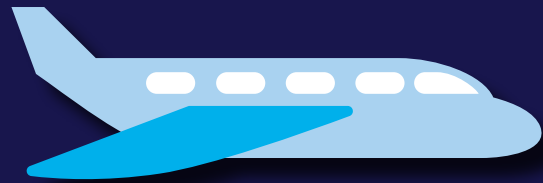
2020: 3.71 million

2021: 3.78 million

2022: 3.82 million

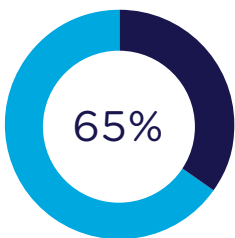
2023: 3.86 million

2024: 3.89 million

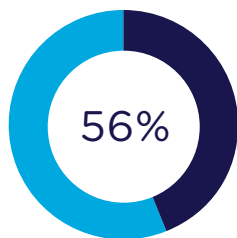


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

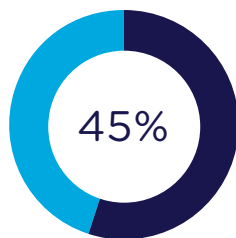
Top 5 Motivations for Selecting Last Intercontinental Destination



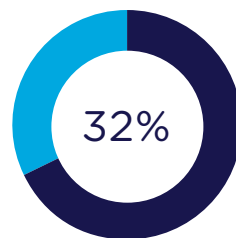
Dining/gastronomy



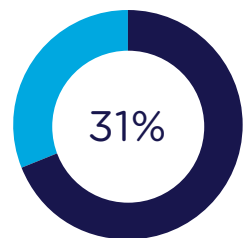
Cultural/historical attractions



Shopping

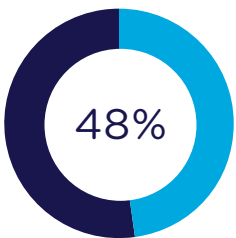


Local lifestyle

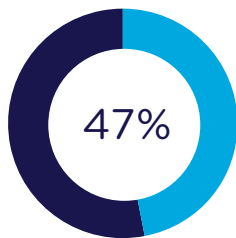


Beaches/seaside attractions

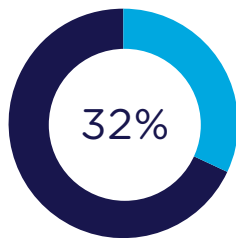
Top 5 Strongest Impressions of the USA



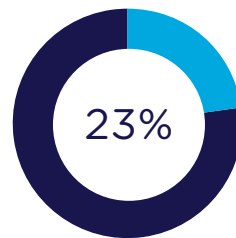
Diverse



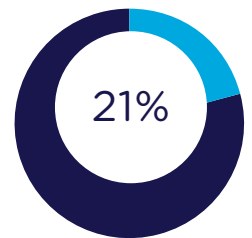
Energetic



Friendly



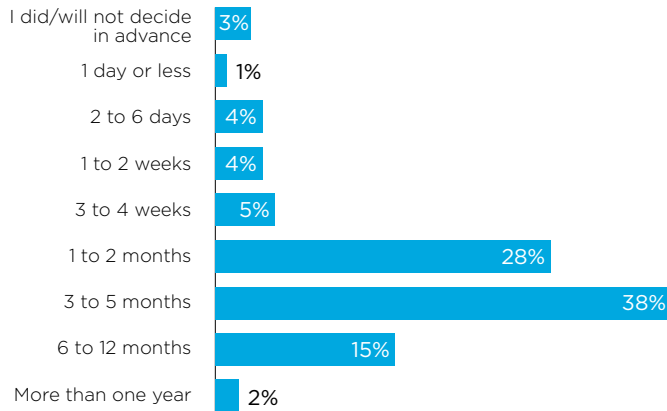
Optimistic



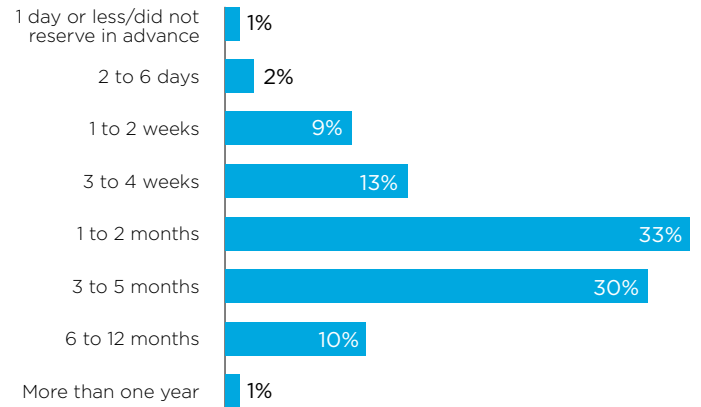
Adventurous

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



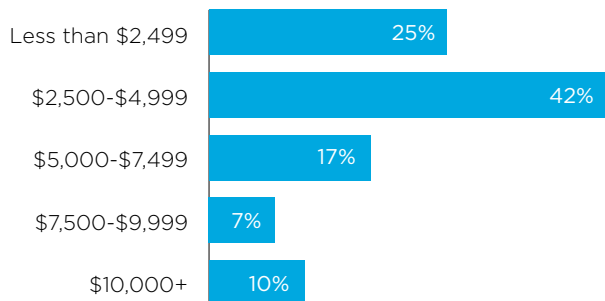
AIR BOOKING



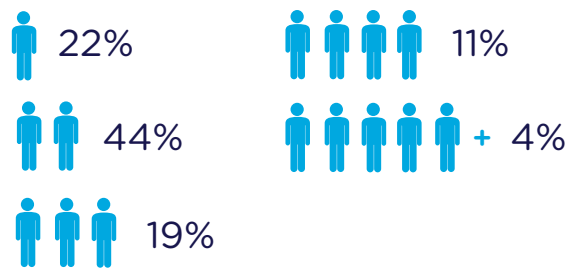
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



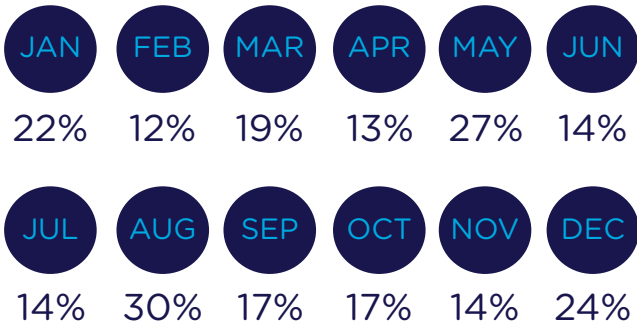
Expected Household Travel Spending for Next Intercontinental Trip



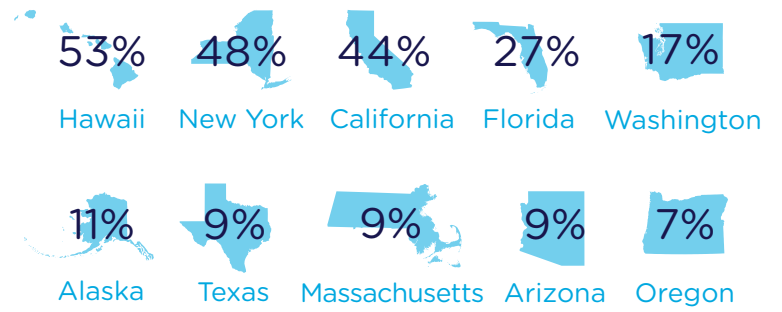
Expected Travel Party Size of Next Intercontinental Trip



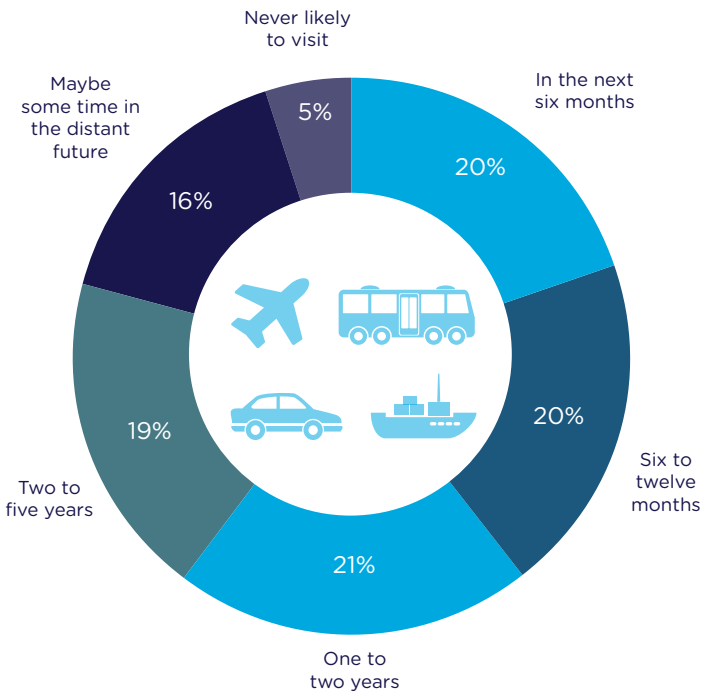
Months Traveled (March 2017–March 2019)



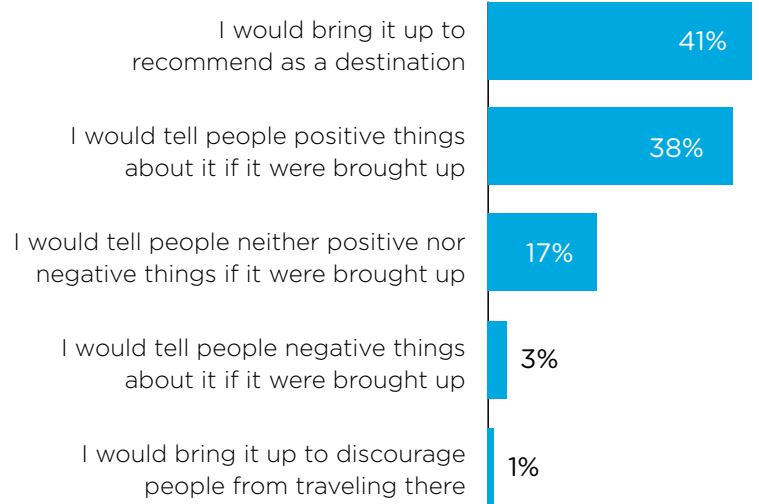
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 2.21 million (-5.3% from 2017)

2018 spend: \$9.54 billion (-4.8% from 2017)

2019-2024 visitation forecast

2019: 2.19 million

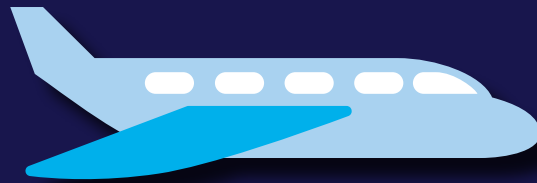
2020: 2.21 million

2021: 2.26 million

2022: 2.30 million

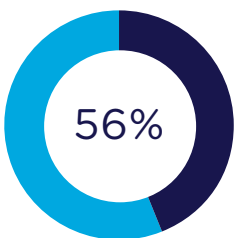
2023: 2.35 million

2024: 2.39 million

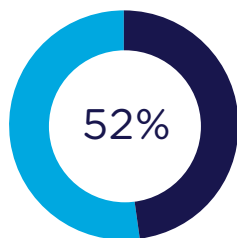


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

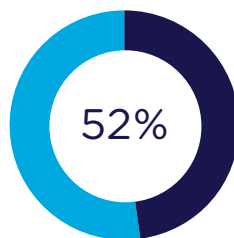
Top 5 Motivations for Selecting Last Intercontinental Destination



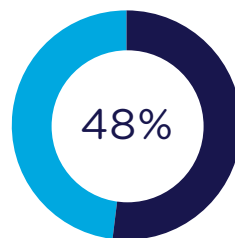
Cultural/historical attractions



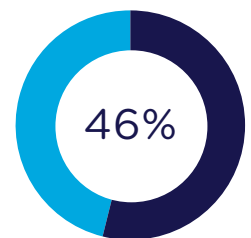
Beaches/seaside attractions



Ecotourism and nature

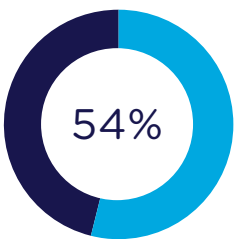


Urban attractions

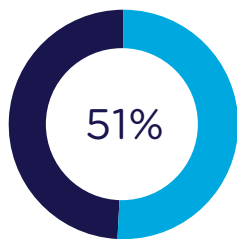


Dining/gastronomy

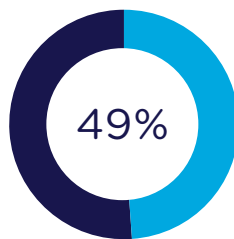
Top 5 Strongest Impressions of the USA



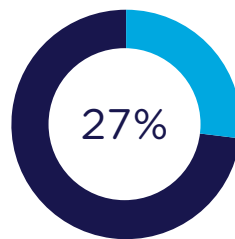
Open-minded



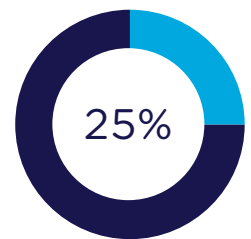
Diverse



Energetic



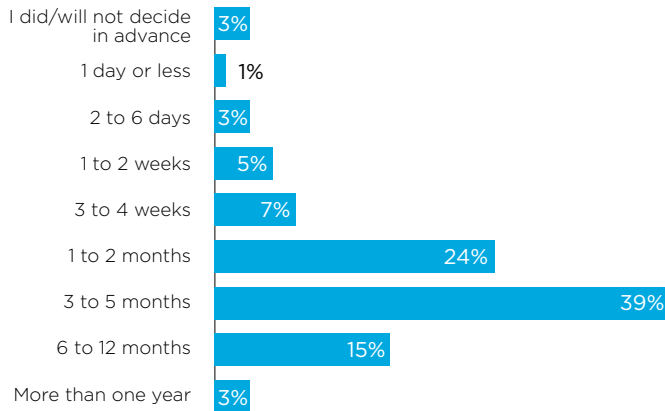
Sophisticated



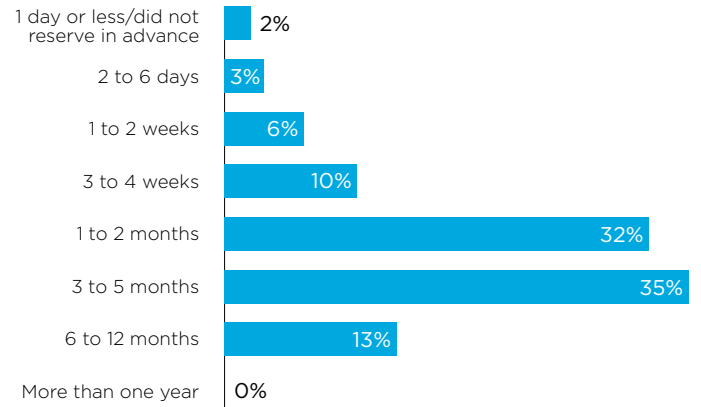
Down-to-earth

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



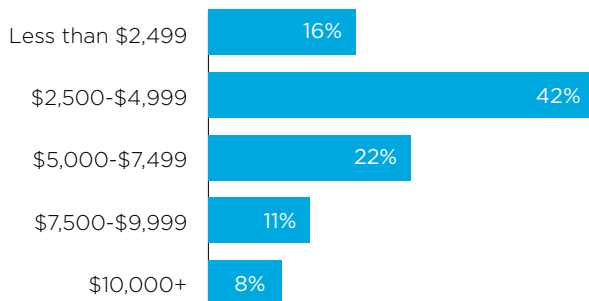
AIR BOOKING



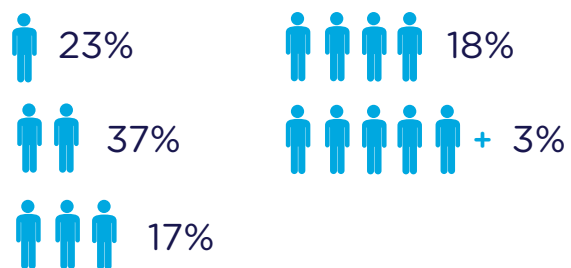
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



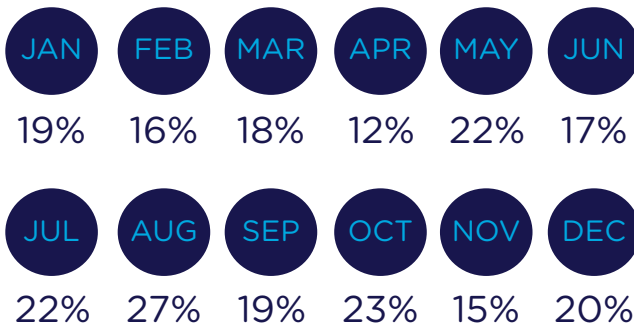
Expected Household Travel Spending for Next Intercontinental Trip



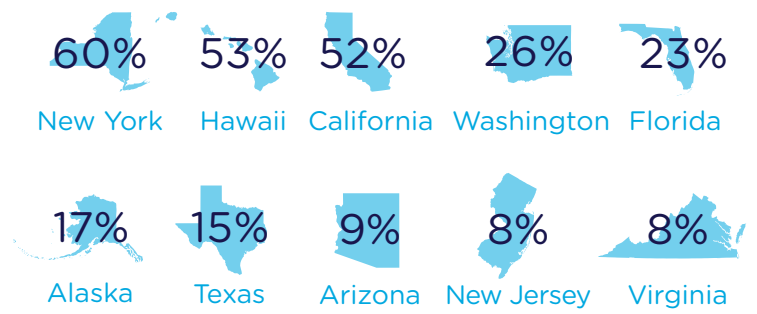
Expected Travel Party Size of Next Intercontinental Trip



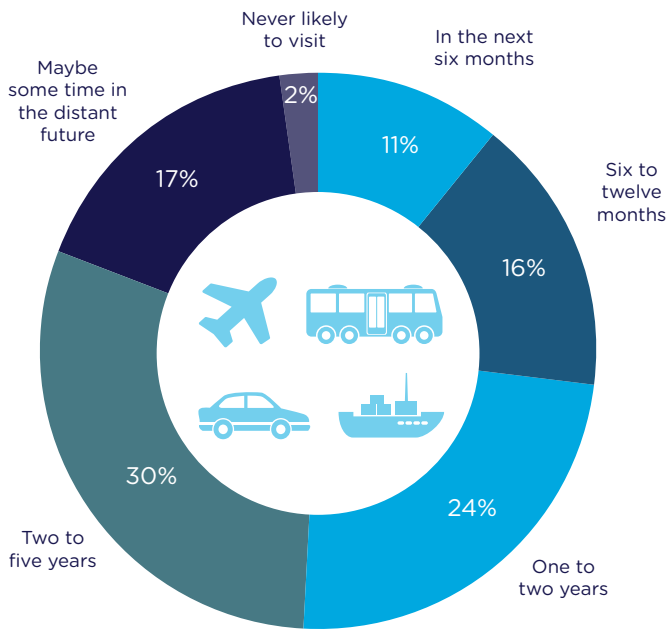
Months Traveled (March 2017–March 2019)



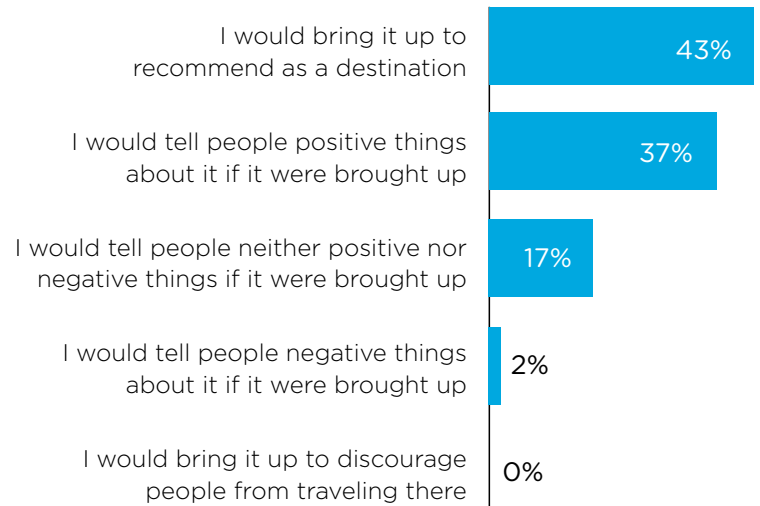
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.



Mexico

2018 visitation: 18.52 million (+3.9% from 2017)

2018 spend: \$20.86 billion (+1.7% from 2017)

2019-2024 visitation forecast

2019: 17.78 million

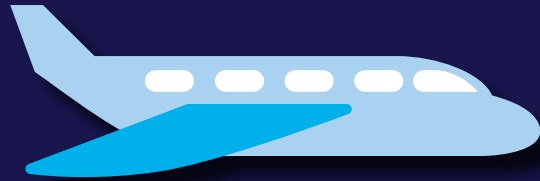
2020: 17.96 million

2021: 18.50 million

2022: 19.05 million

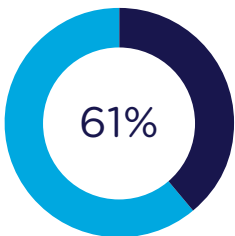
2023: 19.63 million

2024: 20.21 million

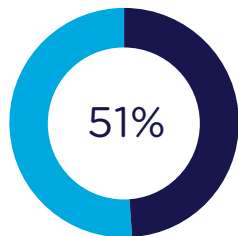


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

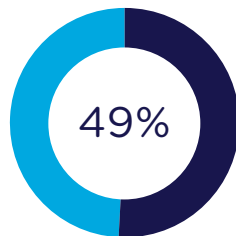
Top 5 Motivations for Selecting Last Intercontinental Destination



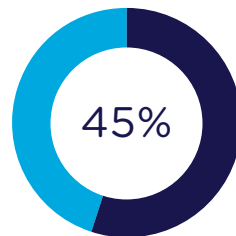
Cultural/historical attractions



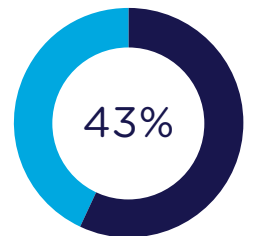
Dining/gastronomy



Urban attractions

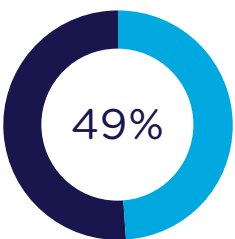


Local lifestyle

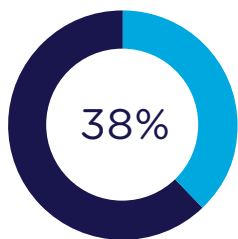


Shopping

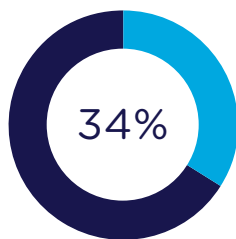
Top 5 Strongest Impressions of the USA



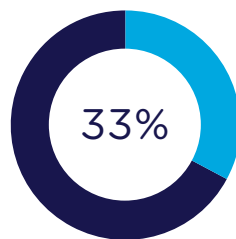
Diverse



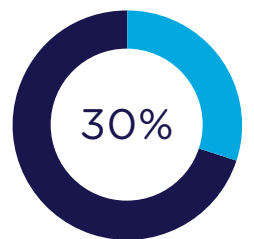
Trendy



Adventurous



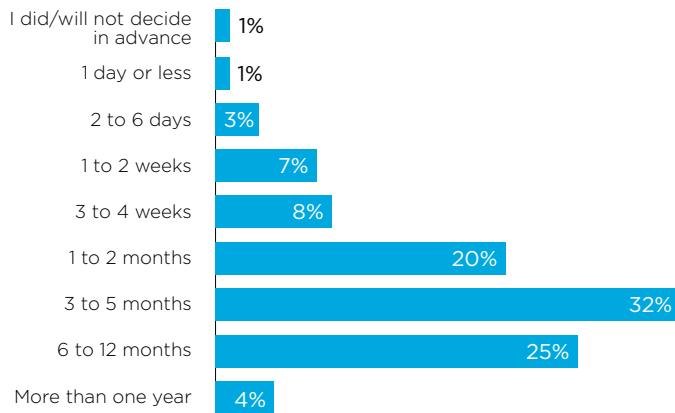
Down-to-earth



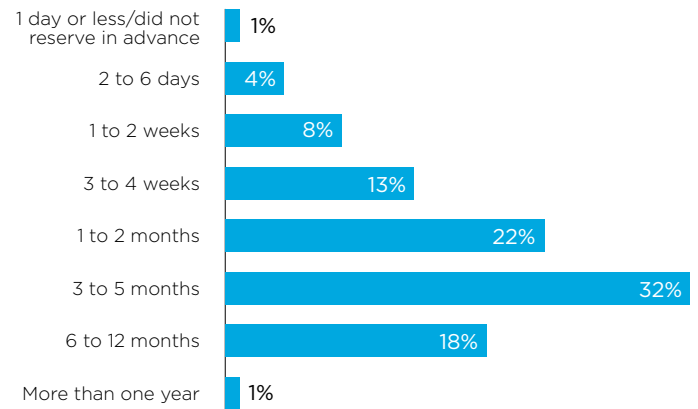
Open-minded

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



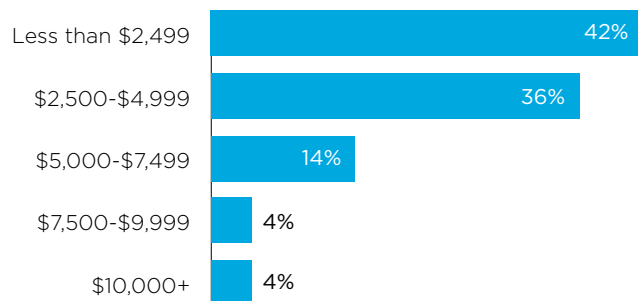
AIR BOOKING



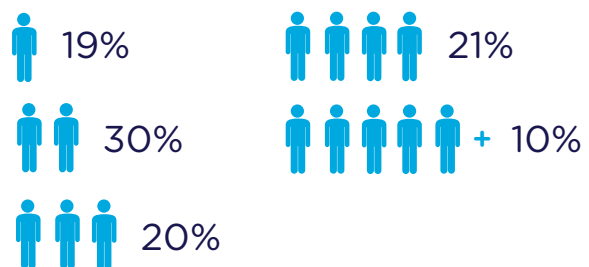
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



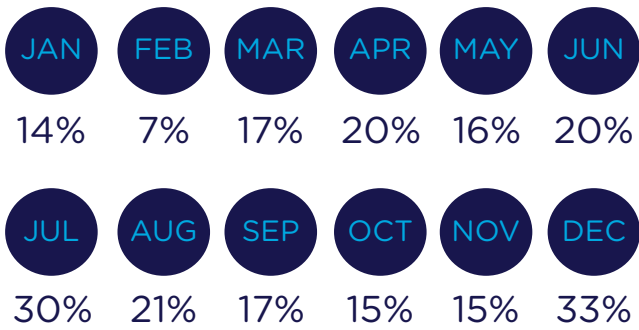
Expected Household Travel Spending for Next Intercontinental Trip



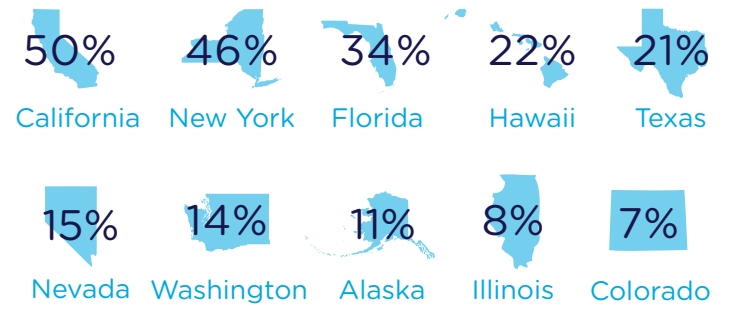
Expected Travel Party Size of Next Intercontinental Trip



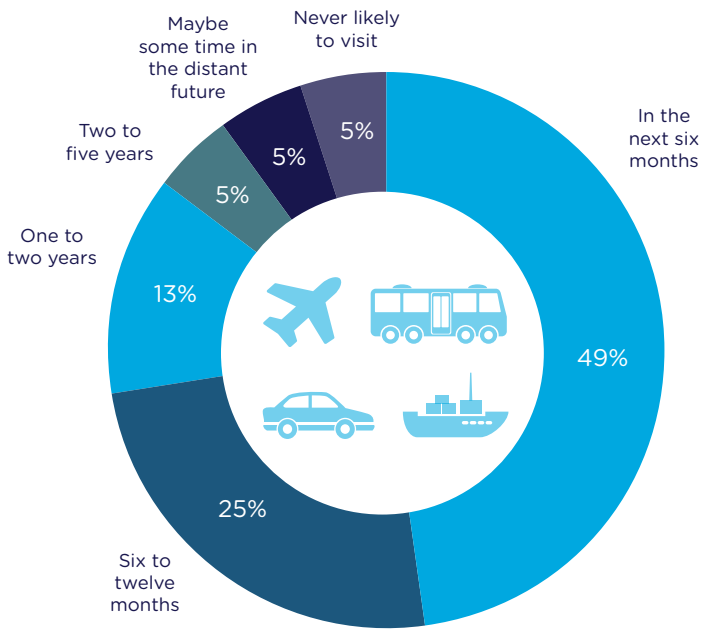
Months Traveled (March 2017–March 2019)



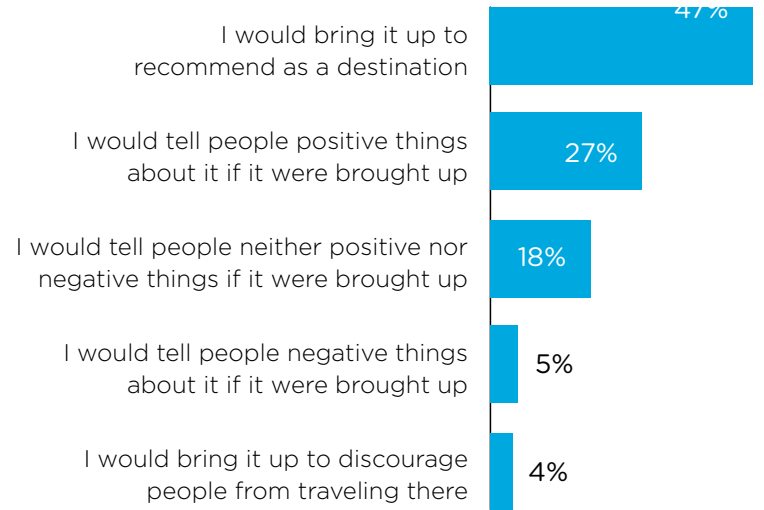
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.



Netherlands

2018 visitation: 725,283 (+3.5% from 2017)

2018 spend: \$2.79 billion (+5.2% from 2017)

2019-2024 visitation forecast

2019: 725,000

2020: 740,000

2021: 755,000

2022: 770,000

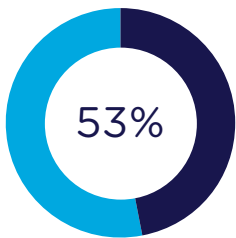
2023: 785,000

2024: 801,000

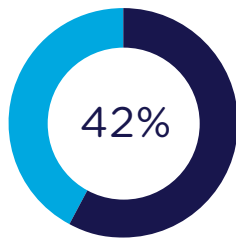


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

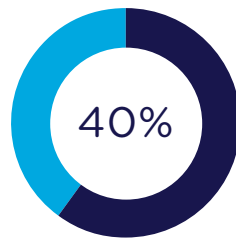
Top 5 Motivations for Selecting Last Intercontinental Destination



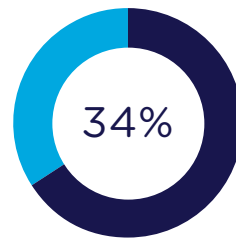
Cultural/historical attractions



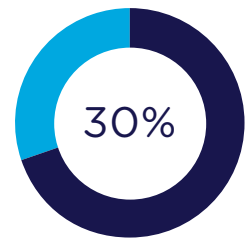
Beaches/seaside attractions



Ecotourism and nature

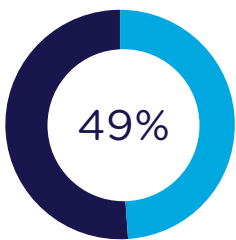


Local lifestyle

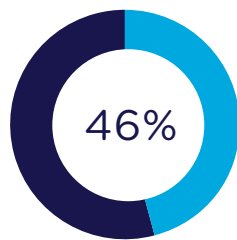


Urban attractions

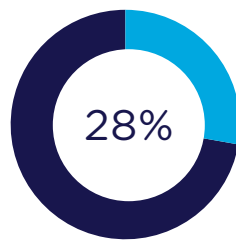
Top 5 Strongest Impressions of the USA



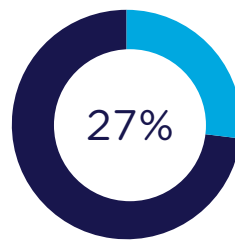
Adventurous



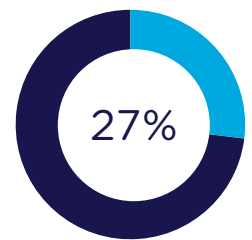
Diverse



Trendy



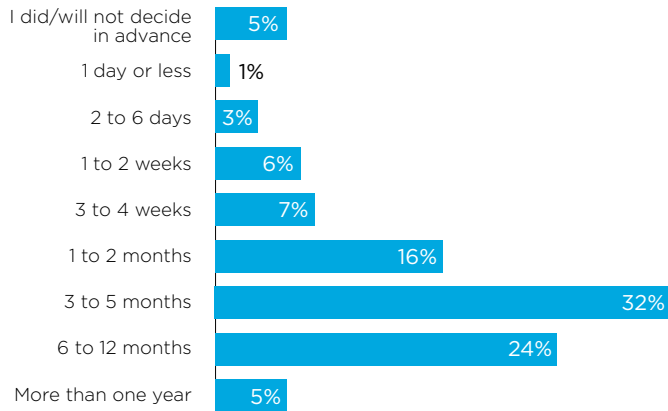
Energetic



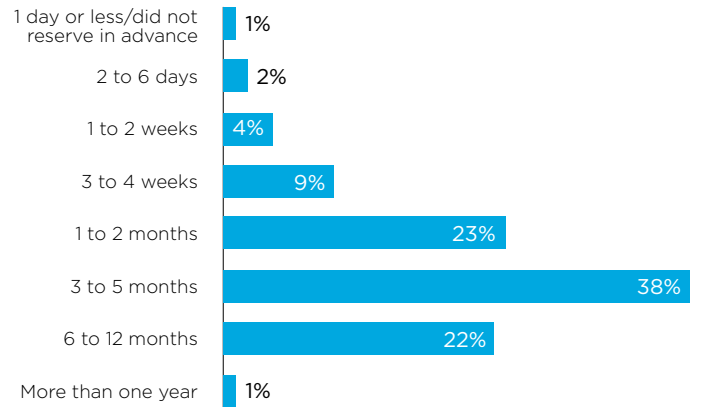
Friendly

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



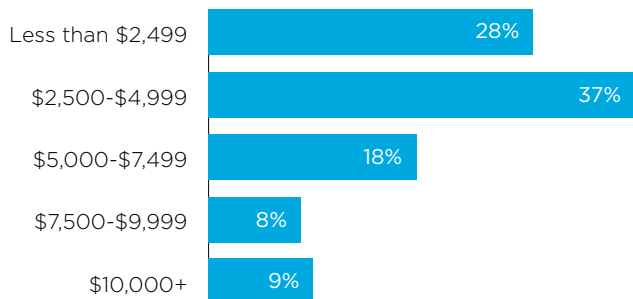
AIR BOOKING



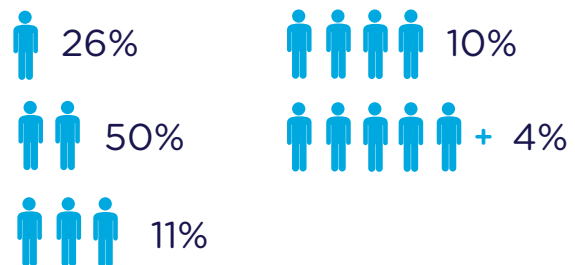
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



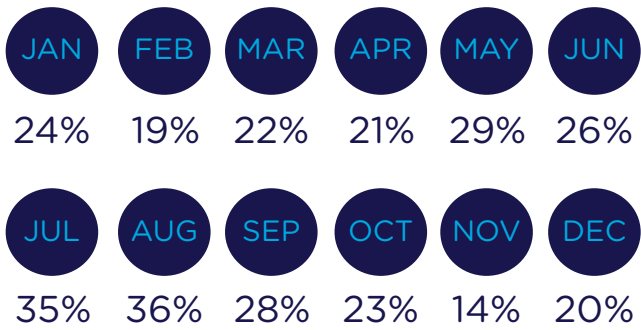
Expected Household Travel Spending for Next Intercontinental Trip



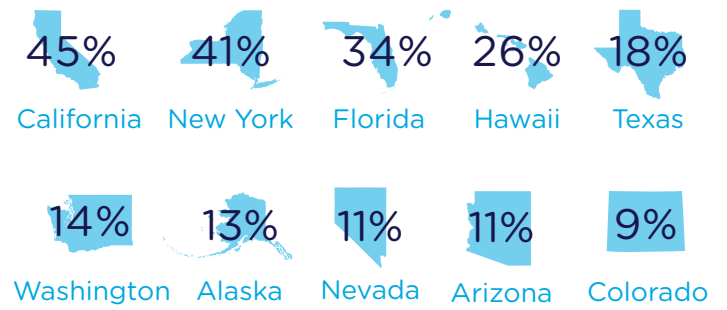
Expected Travel Party Size of Next Intercontinental Trip



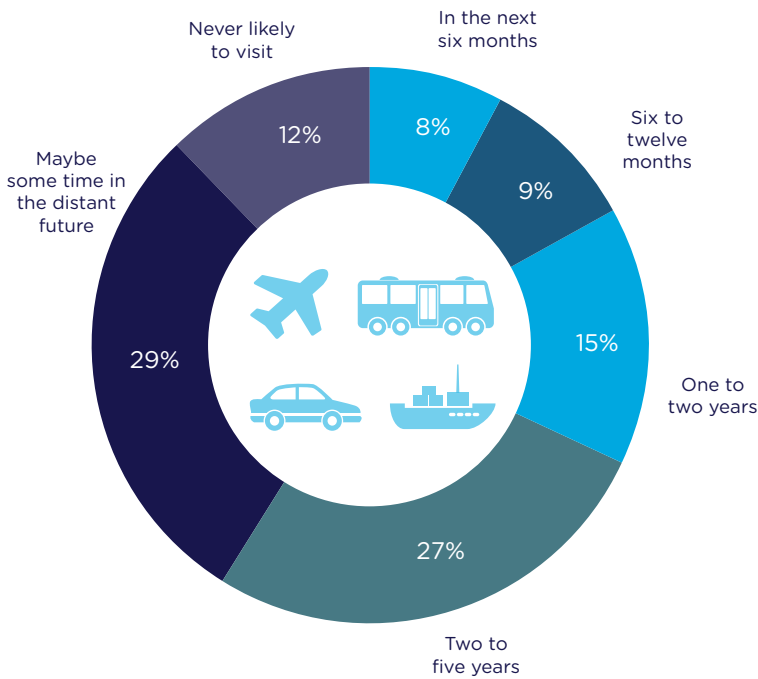
Months Traveled (March 2017–March 2019)



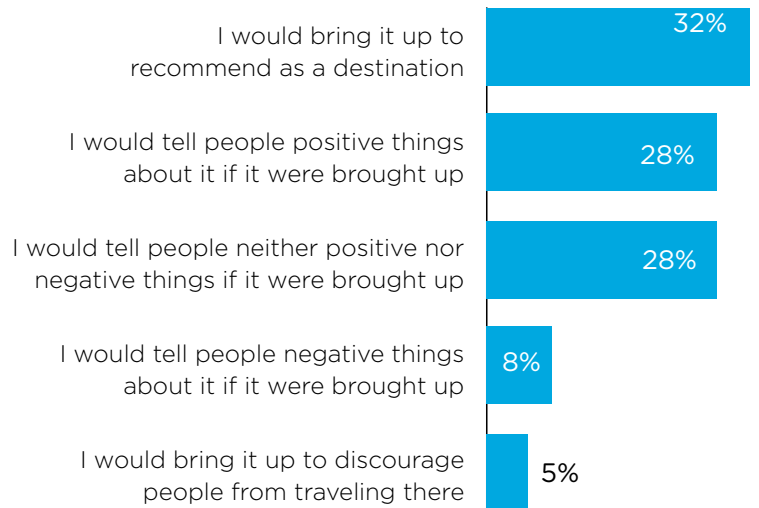
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

2018 visitation: 876,248 (6.0% from 2017)

2018 spend: TBA

2019-2024 visitation forecast

2019: 929,000

2020: 947,000

2021: 966,000

2022: 986,000

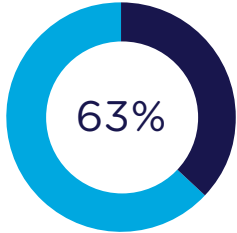
2023: 996,000

2024: 1.01 million

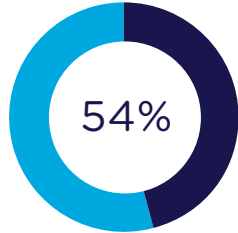


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

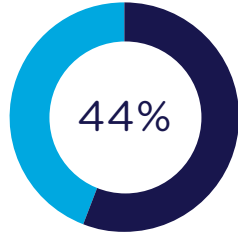
Top 5 Motivations for Selecting Last Intercontinental Destination



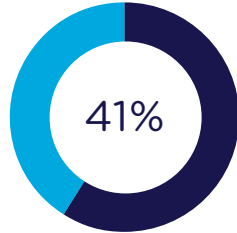
Cultural/historical attractions



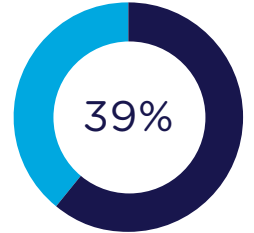
Local lifestyle



Dining/gastronomy

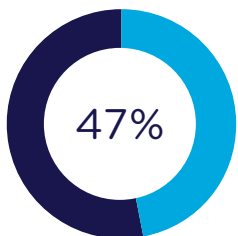


Beaches/seaside attractions

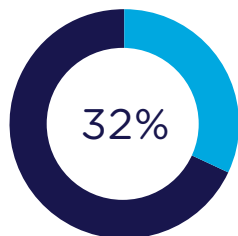


Urban attractions

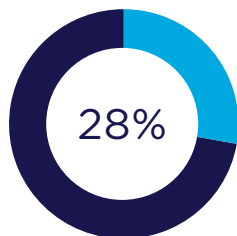
Top 5 Strongest Impressions of the USA



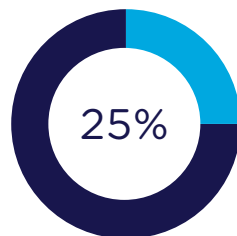
Diverse



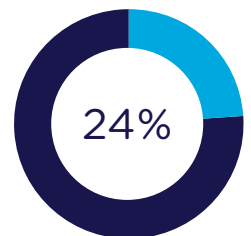
Trendy



Open-minded



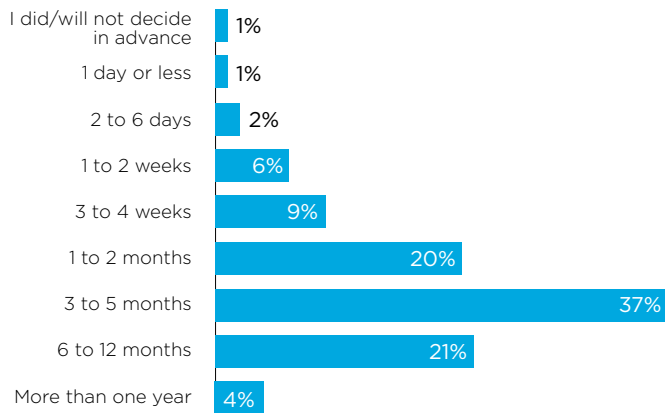
Adventurous



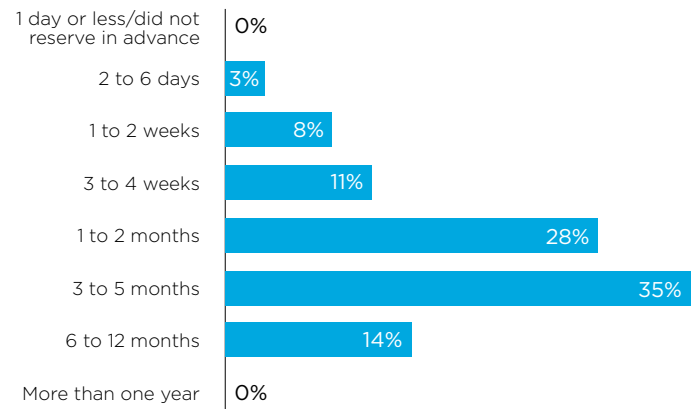
Energetic

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



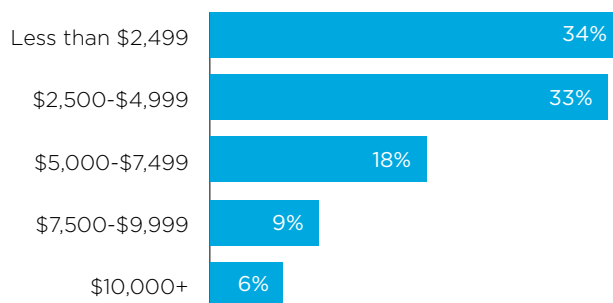
AIR BOOKING



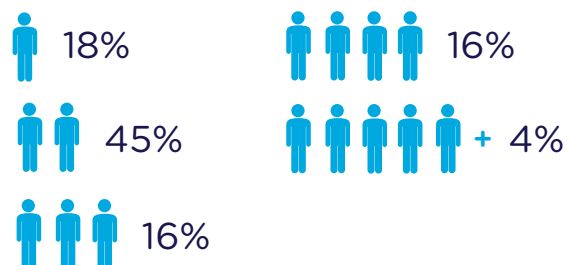
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



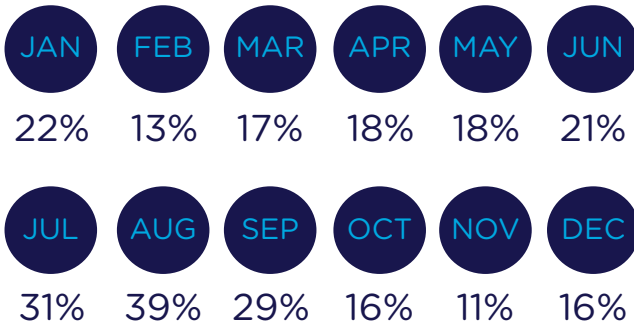
Expected Household Travel Spending for Next Intercontinental Trip



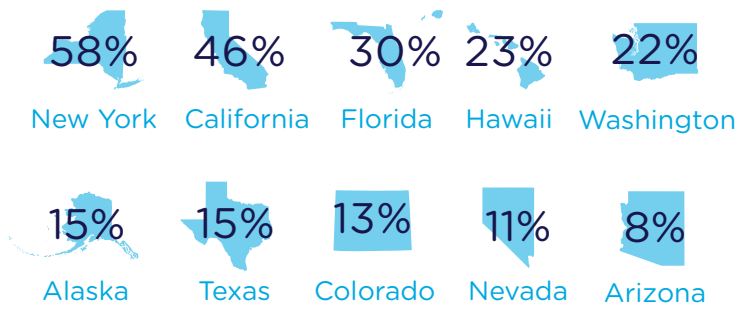
Expected Travel Party Size of Next Intercontinental Trip



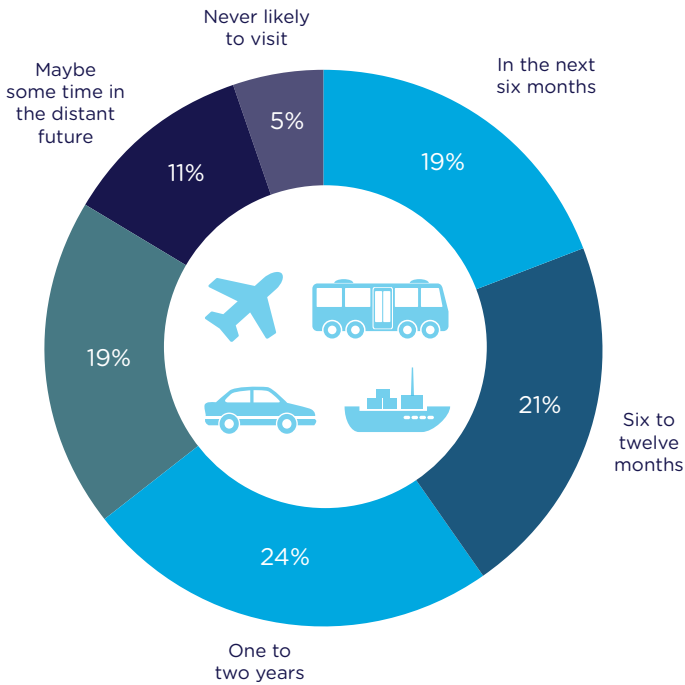
Months Traveled (March 2017–March 2019)



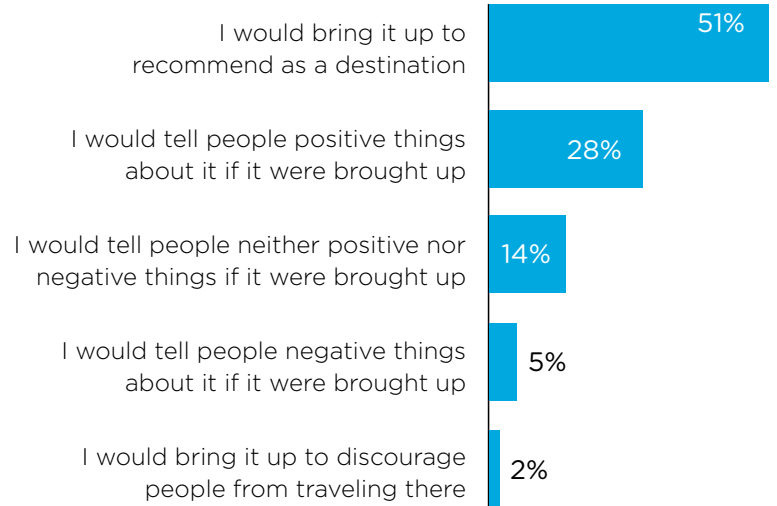
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.



United Kingdom

2018 visitation: 4.66 million (+3.9% from 2017)

2018 spend: \$16.16 billion (+3.2% from 2017)

2019-2024 visitation forecast

2019: 4.85 million

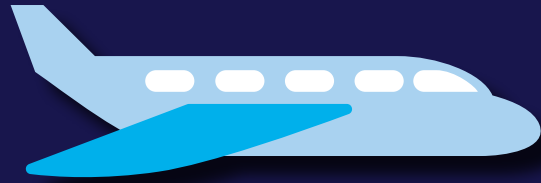
2020: 4.94 million

2021: 5.09 million

2022: 5.19 million

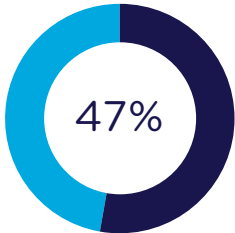
2023: 5.30 million

2024: 5.40 million

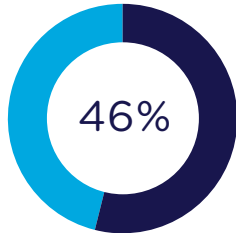


Source: National Travel and Tourism Office, U.S. Department of Commerce (NTTO)

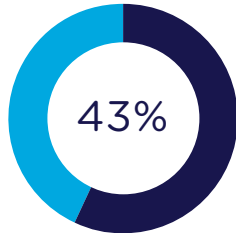
Top 5 Motivations for Selecting Last Intercontinental Destination



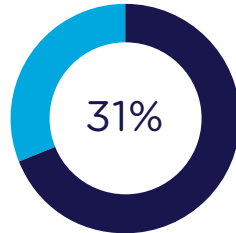
Local lifestyle



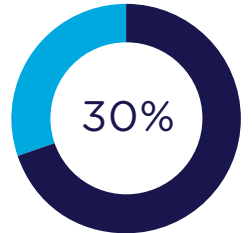
Cultural/historical attractions



Beaches/seaside attractions

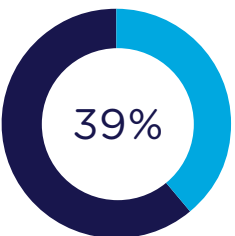


Dining/gastronomy

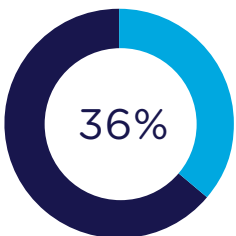


Urban Attractions

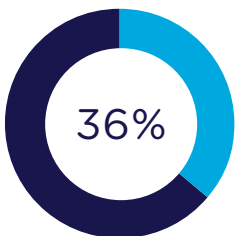
Top 5 Strongest Impressions of the USA



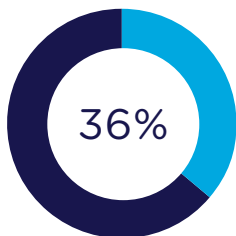
Friendly



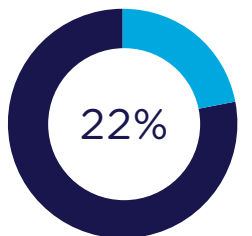
Energetic



Adventurous



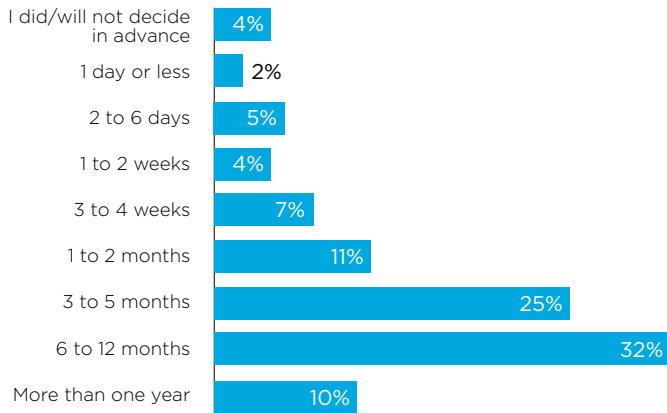
Diverse



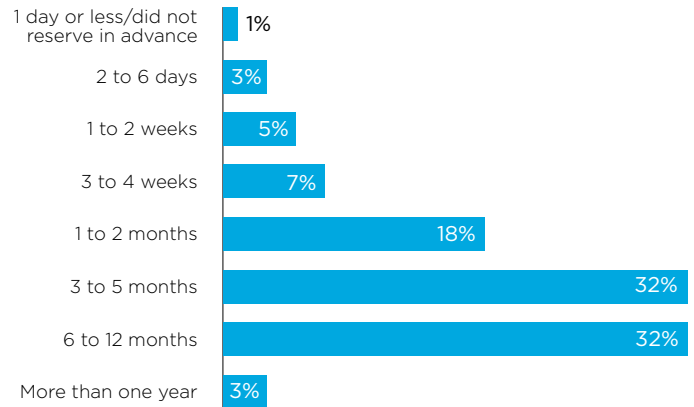
Trendy

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION



AIR BOOKING



Top 5 Channels Used in Destination Selection for Last Intercontinental Trip



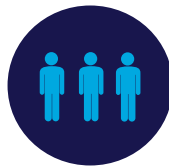
51%

Websites via computer or laptop



31%

Website or applications via tablet



30%

Personal recommendations from family or friends



26%

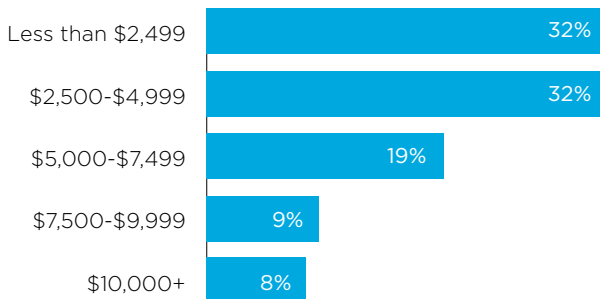
Websites or applications via mobile phone



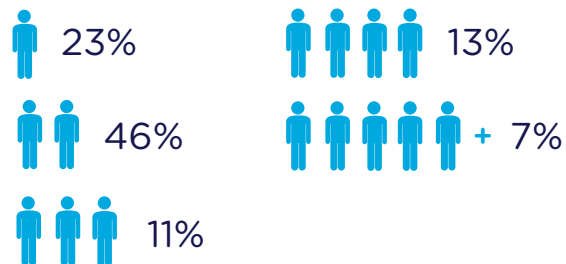
22%

Information in printed travel guidebooks

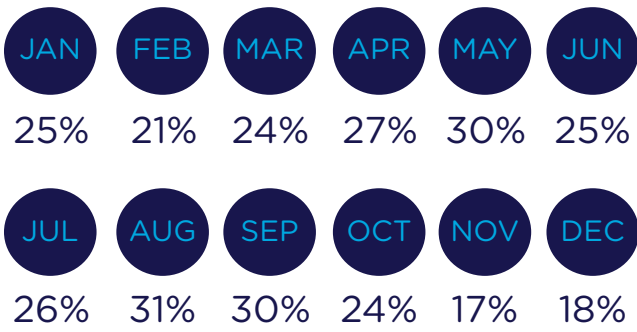
Expected Household Travel Spending for Next Intercontinental Trip



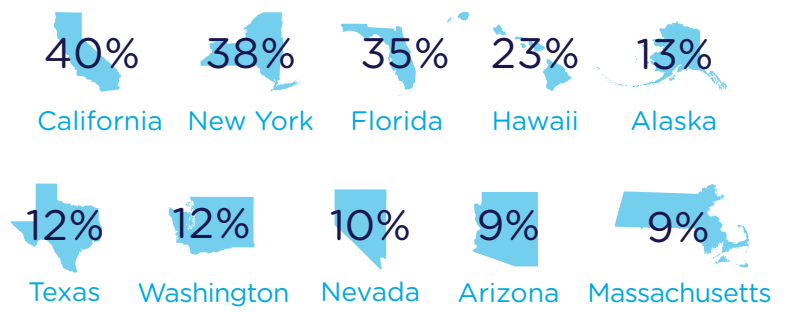
Expected Travel Party Size of Next Intercontinental Trip



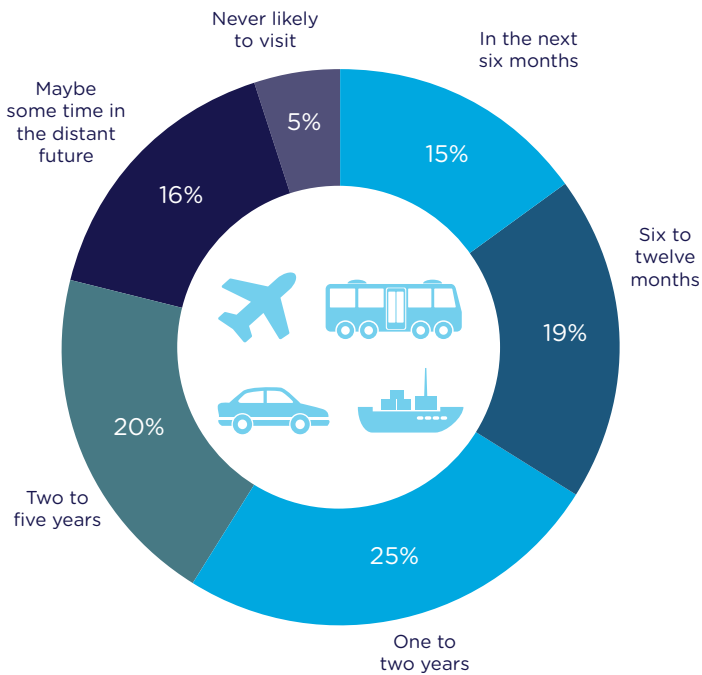
Months Traveled (March 2017–March 2019)



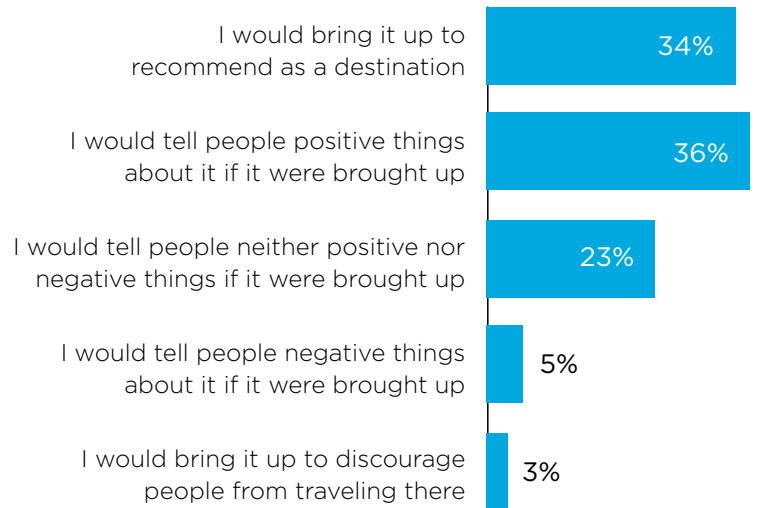
Destination Interest—Top 10 States



Likelihood of Travel to USA



Net Promoter



Source: Brand USA proprietary research unless otherwise noted.

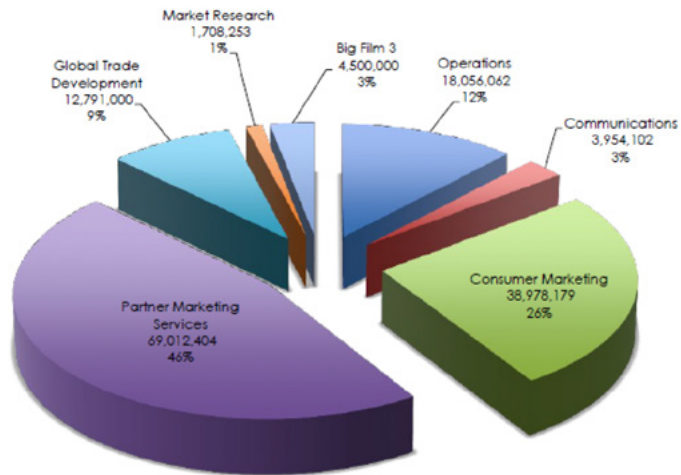


FY2020 Budget

BUDGET

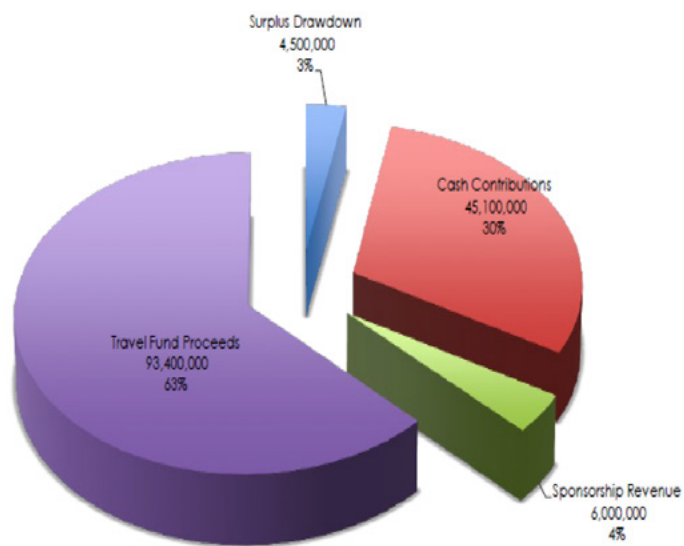
FY2020 EXPENSE BUDGET

\$149,000,000



FY2020 REVENUE BUDGET

\$149,000,000



EXPLANATION FOR BUDGET ITEMS OVER \$500,000

VENDOR	Budgeted Amount	Description
McGillivray Freeman Films	\$4,850,000	Film Production and Distribution
US Travel Association	\$1,500,000	Events Sponsorship
Farragut Center	\$1,300,000	Lease
Miles Partnership	\$4,500,000	Co-operative Marketing Agency - Creative development, print and distribution, media buying, etc.
JC Decaux	\$625,000	Out-of-Home Media Space - UK/Ireland
TCCT Retail Ltd.	\$2,500,000	Digital, Out-of-Home, and Print Media Space - Global
Hills Balfour	\$3,800,000-\$4,200,000	Trade and Consumer Public Relations Representation in the United Kingdom and Europe
BBC Worldwide	\$575,000.00	Film Production
Cubo Communications	\$550,000.00	Digital Media - South America
SDL International Inc.	\$1,000,000-1,500,000	Translation Services
Avia Reps	\$1,250,000-\$1,500,000	Trade and Consumer Public Relations Representation in China
Avia Reps	\$500,000-\$600,000	Trade and Consumer Public Relations Representation in Brazil
Edelman	\$700,000-\$800,000	Trade and Consumer Public Relations Representation in Korea
Code and Theory	\$1,250,000-\$2,000,000	Consumer Website Development, Maintenance, and Hosting
Google	\$900,000	Digital Media - Global
Dirt Worldwide	\$750,000	Media and Creative Strategy
CTrip Business Shanghai Co. Ltd.	\$1,000,000	Digital Media - China
Hylink	\$750,000-\$1,250,000	Consumer Website Development, Social Media Management, and Media Buying in China
Gate 7	\$750,000-\$1,000,000	Trade and Consumer Public Relations Representation in Australia and New Zealand
Mediacom	-	Global Media Planning and Buying Services
Insomniac	\$650,000-\$1,000,000	Corporate Website Development, Maintenance, and Hosting
Finn Partners	\$500,000-\$600,000	Global Consumer Public Relations
Ogilvy PR	\$500,000-\$600,000	Global Corporate Public Relations
Alchemia	\$500,000-\$600,000	Trade and Consumer Public Relations Representation in Mexico
Sartha Marketing	\$500,000-\$600,000	Trade and Consumer Public Relations Representation in India

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



The Brand USA Team

BRAND USA LEADERSHIP TEAM



Christopher L. Thompson
President & CEO



Thomas Garzilli
Chief Marketing Officer



Donald F. Richardson
Chief Financial Officer



Karyn Gruenberg
Senior Vice President,
Partner Marketing &
Strategic Alliances



Jake Conte
Vice President,
General Counsel



Cathleen Domanico
Vice President,
Global Trade Development



Tracy Lanza
Vice President,
Integrated Marketing



Joann Pelipesky
Vice President,
Human Resources &
Administration



Carroll Rheem
Vice President,
Research & Analytics



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

TOGETHER, WE'RE MARKETING THE USA.



BOARD OF DIRECTORS

BRAND USA BOARD OF DIRECTORS

Brand USA is governed by an 11-member Board of Directors appointed for a maximum of two consecutive three-year terms by the U.S. Secretary of Commerce in consultation with the Secretary of State and the Secretary of Homeland Security.

As required by the Travel Promotion, Enhancement, and Modernization Act of 2014, all members of the board are United States citizens and are either current or former chief executive officers, chief financial officers, or chief marketing officers, or have held equivalent management positions.

Members of the board have leadership expertise in specific sectors of the travel industry including: hotel accommodations; restaurants; retail or a related association; travel distribution; attractions; state-level tourism office; city-level convention and visitors bureau; passenger air; land or sea

transportation; and immigration law and policy. At least two members of the board are audit committee financial experts. In addition, at least five members of the board have expertise in international travel promotion or marketing broadly representing various regions of the United States.

As provided for in its charter, the Governance & Nominating Committee makes recommendations to the board for committee member appointments and selection of the board leadership, including the chair, vice chairs, secretary, and treasurer.

In accordance with the above, the following business leaders at the time of publication of this annual report serve on the board of directors of Brand USA.



Barbara J. Richardson
CHAIR, BRAND USA

Executive Vice President,
External Relations,
Washington Metropolitan
Area Transit Authority
Board member since
October 2013

**Member: Conflict of Interest
Committee and
Finance Committee**
**Represents: Land or Sea
Transportation Sector**



John F. Edman
VICE CHAIR, BRAND USA

Director & CEO,
Explore Minnesota Tourism
Board member since
October 2014

**Member: Finance Committee
and Governance &
Nominating Committee**
**Represents: Official of a State
Tourism Office**



Alice Norsworthy
VICE CHAIR, BRAND USA

Chief Marketing Officer,
Universal Parks & Resorts
Board member since
December 2016

Member: Finance Committee
**Represents: Attractions or
Recreation Sector**



Kyle Edmiston

TREASURER, BRAND USA

President/CEO,
Lake Charles/Southwest Louisiana
Convention & Visitors Bureau
Board member since December 2015

Chair: Finance Committee

**Represents: Official of a Convention and
Visitors Bureau**



Andrew Greenfield

SECRETARY, BRAND USA

Partner, Fragomen, Del Rey,
Bernsen and Loewy, LLP
Board member since October 2013

Chair: Governance & Nominating Committee

Member: Conflict of Interest Committee

Represents: Immigration Law and Policy Sector



Kristen Branscum

BOARD MEMBER

Former Commissioner,
Kentucky Department of Tourism
Board member since February 2019

Represents: Official of a State Tourism Office



Paul Brown

BOARD MEMBER

Co-founder and CEO, Inspired Brands, Inc.
Board member since February 2019

Member: Audit Committee

Represents: Restaurant Sector



Mike Gallagher
BOARD MEMBER

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

Member: Governance & Nominating Committee

Represents: Small Business or Retail Sector



Noel Irwin Hentschel
BOARD MEMBER

Chairman and CEO,
AmericanTours International, LLC
Board member since November 2017

Member: Audit Committee and Finance Committee

Represents: Travel Distribution Services Sector



Mark Hoplamazian
BOARD MEMBER

President and CEO,
Hyatt Hotels Corporation
Board member since February 2019

Member: Finance Committee

Represents: Hotel Accommodations Sector



Thomas F. O'Toole
BOARD MEMBER

Senior Fellow and Clinical Professor of Marketing,
Kellogg School of Management, Northwestern University
Board member since December 2016

**Chair: Conflict of Interest Committee and
Audit Committee**

Represents: Passenger Air Sector

BOARD COMMITTEES

The board of directors and its committees meet regularly throughout the year. Members of the public are encouraged to participate by webcast and/or conference call. For more information about members of the Brand USA board of directors, regularly scheduled meetings, or records of past board meetings, please visit: TheBrandUSA.com/about/directors

Board-related questions or comments can be addressed to BoardMeetings@TheBrandUSA.com

AUDIT COMMITTEE

Thomas F. O'Toole, Chair

Paul Brown

Noel Irwin Hentschel

Audit Committee meetings are held at least three times per year with one meeting scheduled to occur with the conclusion of the annual audit.

CONFLICT OF INTEREST COMMITTEE

Thomas F. O'Toole, Chair

Andrew Greenfield

Barbara Richardson

Conflict of Interest Committee meetings are scheduled on an as-needed basis as determined by the board chair and/or committee chair.

FINANCE COMMITTEE

Kyle Edmiston, Chair

John Edman

Noel Irwin Hentschel

Mark Hoplamazian

Alice Norsworthy

Barbara Richardson

Finance Committee Meetings are held four times per year and are scheduled to occur immediately prior to each board meeting.

GOVERNANCE & NOMINATING COMMITTEE

Andrew Greenfield, Chair

John Edman

Mike Gallagher






Governance & Nominating Committee meetings are held at least once per year and timed to occur at or near the conclusion of the board chair's term and/or the appointment of new board members.









Connect With Us

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

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

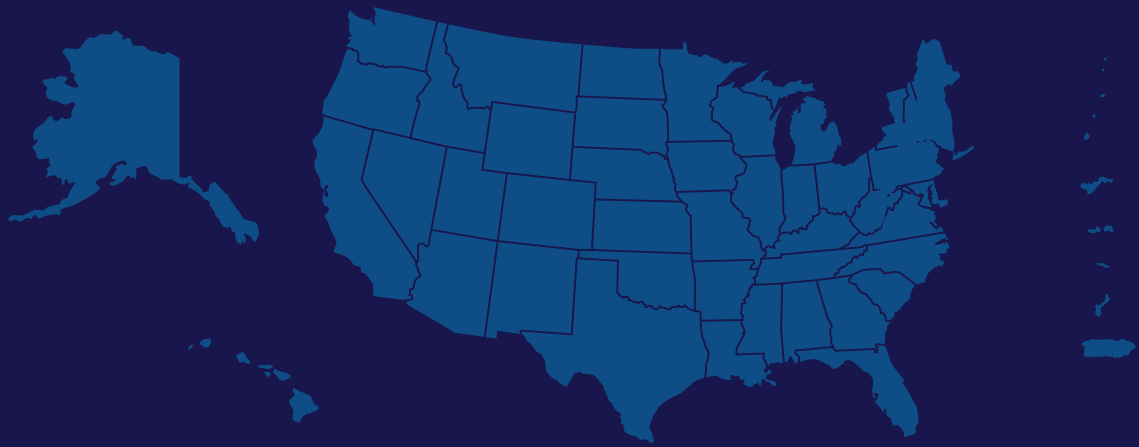
-  TheBrandUSA.com
-  [@BrandUSA](https://twitter.com/BrandUSA)
-  Facebook.com/BrandUSA
-  YouTube.com/BrandUSATV
-  Linkedin.com/Company/BrandUSA

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

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

GoUSA.tv Available on Roku, Apple TV, Amazon Fire, iOS, and Android

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



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