

FY 2022

OBJECTIVES AND BUSINESS PLAN



VisitTheUSA.com

Brand USA

YOSEMITE NATIONAL PARK, CALIFORNIA



VisitTheUSA.com

Brand USA

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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.

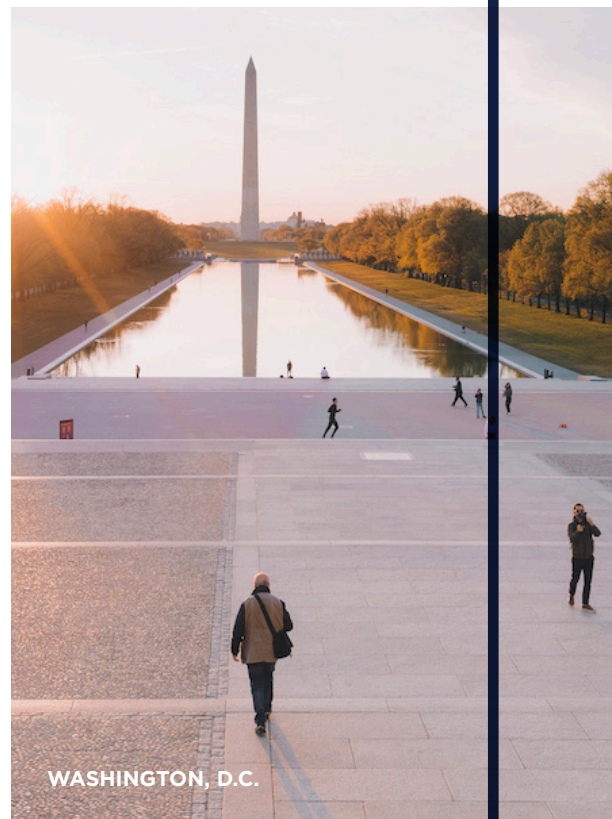
International travel to the United States is one of the best levers for driving economic growth and job creation. According to the U.S. Department of Commerce, travel and tourism exports support 1.1 million American jobs. Since its founding, Brand USA has worked in close partnership with destinations and travel companies to ensure the benefits of international travel accrue to communities of all shapes and sizes throughout the country. Together we have invited the world to explore the diverse and limitless travel experiences that make the United States such a unique destination.

According to studies by Oxford Economics, over the past eight years Brand USA's marketing initiatives have helped welcome 7.7 million incremental visitors to the USA, benefiting the U.S. economy with \$56 billion in total economic impact, and supporting, on average, nearly 45,000 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](https://www.TheBrandUSA.com)**.

For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at **[VisitTheUSA.com](https://www.VisitTheUSA.com)**.



ROLE AND IMPACT

OUR VISION

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

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.

CUMULATIVE IMPACT: 8-YEAR ROI

Over the past eight years, Brand USA’s marketing efforts have generated...





SITUATIONAL OVERVIEW

GRAND VIEW TERRACE

MOUNT RUSHMORE, SOUTH DAKOTA

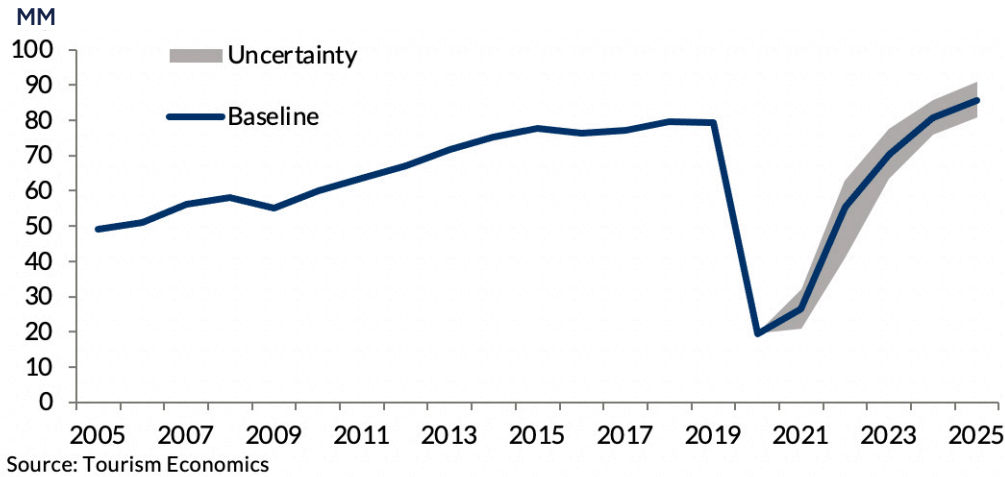
PUBLIC HEALTH, ECONOMIC, AND TRAVEL CONDITIONS

KEY FINDINGS



- The global economic outlook is promising, with the re-imposition of strict travel limitations at the start of the year and advancing vaccination rates contributing to a fall in COVID-19 cases. These successes have enabled a greater easing of restrictions, with a marked uptick in activity as consumers have been able to spend excess savings accumulated throughout months of lockdown measures. World GDP is forecast to grow 6.3% in 2021, while the United States will outpace the global average, recording GDP growth of 7.7%, with a summer boom in economic activity expected.
- Globally and in the United States, international travel will remain below 2019 levels until 2024 as governments continue to be more cautious in easing international travel restrictions and tourists stay more risk-averse to foreign travel.
- Short-haul travel from Canada and Mexico is expected to lead the U.S. inbound recovery, reaching 2019 levels by 2023. Overseas markets will not reach this benchmark until 2025 though arrivals from France, Germany and the UK will outpace the wider trend, returning to pre-crisis levels by 2024.
- The rapid pace of vaccination in the United States and key source markets should provide the context for the initial stages of recovery in the latter part of 2021. Among key markets, Canada, France, Germany and Italy lead the way in current vaccination levels.
- Uncertainty persists in the travel outlook, with anxieties surrounding the emergence of new variants leading to a restrained approach to lifting restrictions. In a downside scenario, international arrivals to the United States would remain below 2019 levels until 2025 – one year slower than expected in the baseline forecast.

INBOUND TRAVEL BY SCENARIO, UNITED STATES, 2005-2025



International travel to the USA is forecast to surpass 2019 levels by 2024 in the baseline forecast.

In a downside scenario, this would not be achieved until 2025.

VACCINATION PROGRESS



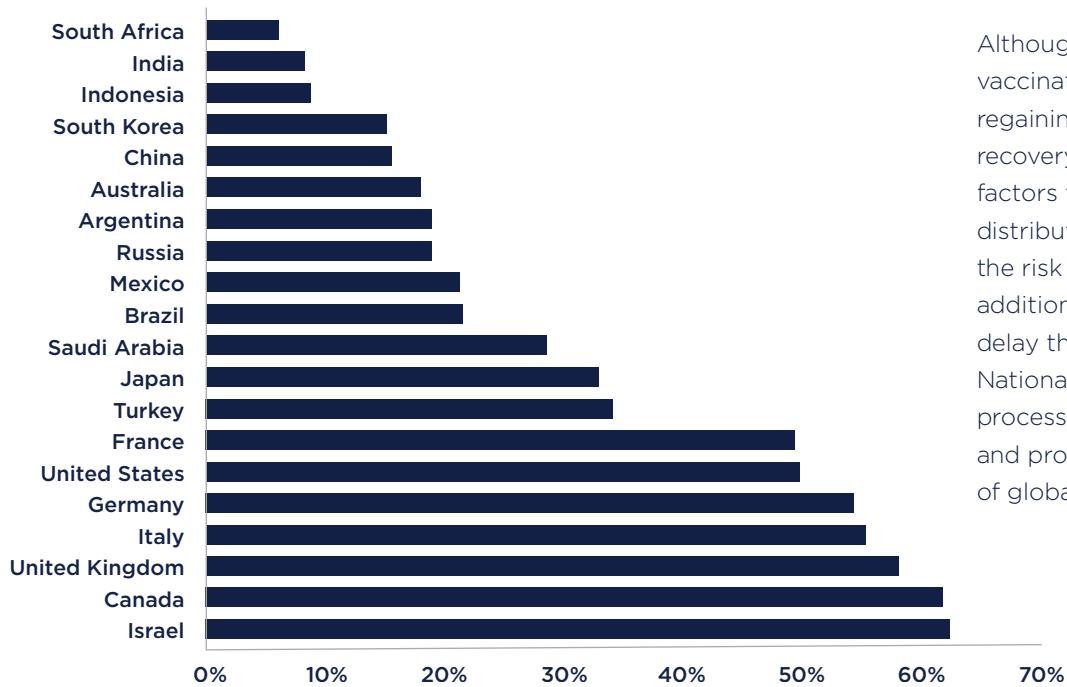
Almost 50% of the U.S. population is fully vaccinated.

Vaccination is under way in approximately 150 countries and will play a vital role in the easing of travel restrictions, supporting the global travel recovery.

Vaccinations have increased the possibility for countries to maintain low coronavirus cases, ease internal restrictions and be able to start a gradual lifting of international restrictions.

Europe and North America have attained a rapid start in administering vaccinations to citizens while effective vaccines are still not widely available to the general population in other regions such as Asia-Pacific, Latin America, the Middle East, and Africa.

CURRENT PERCENTAGE OF POPULATION FULLY VACCINATED



Source: Tourism Economics, OWID

Chart updated: 08/09/2021

Although epidemiologists consider vaccination the biggest step toward regaining normality and thus driving recovery in travel, there are other factors to consider. An unequitable distribution of vaccinations increases the risk of mutated variants and additional outbreaks, which may delay the easing of travel restrictions. National governments are still in the process of determining the criteria and protocols for a full reopening of global travel.

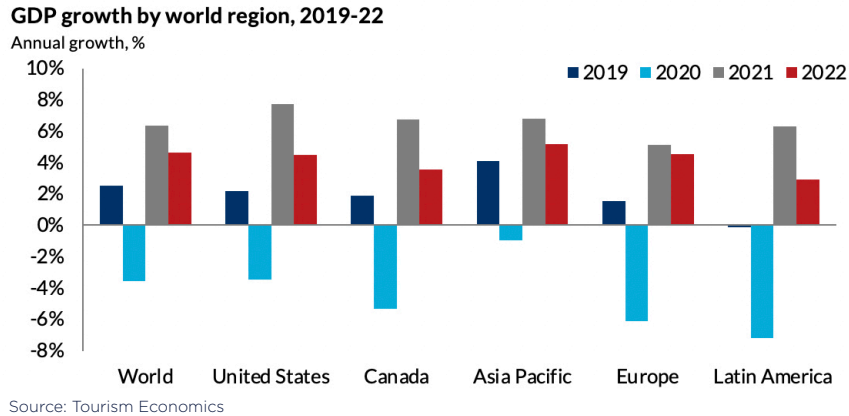
ECONOMIC OUTLOOK

A slowdown in COVID-19 infections has improved the global economic outlook, allowing a greater and more significant easing of restrictions.

While rising COVID-19 infections and the renewal of restrictions depressed global economic activity at the start of the year, there are now encouraging signs. Global COVID-19 case numbers are almost back to their March 2020 lows, and economic data continues to consistently beat economists' expectations on the upside. As a result, Tourism Economics upgraded its world GDP growth forecast for 2021 to 6.3% and expects a healthy gain of 4.6% in 2022.

The optimism rests on three features: After a lackluster first quarter to the year, the pickup in activity will be sharp; the industrial recovery will continue even as economies reopen; and households armed with their excess savings will lead the consumer spending rebound.

The U.S. economy is set to experience a boom during the summer months prompted by reduced virus fear, steady household incomes and elevated savings. Improving health conditions, a more open economy with fewer restrictions, general fiscal stimulus, rebounding employment and increasing optimism will enable the United States to record GDP growth of 7.7% in 2021 – the fastest rate since 1951. While the data has not yet indicated a booming labor market, Tourism Economics expects 8 million jobs to be added to the U.S. economy in 2021.



TRAVEL OUTLOOK

International arrivals will remain 67% below 2019 levels in 2021.

This strong economic recovery bodes well for travel recovery, which has been disproportionately hit by the global pandemic, encountering severe and long-lasting restrictions. Global international travel will remain below pre-crisis levels in 2021, with restrictions being eased very tentatively on average and traveler confidence taking longer to fully recover.

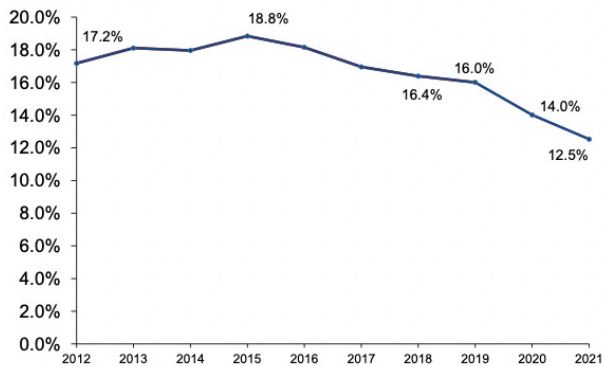
Tourism Economics projects pre-crisis levels to be surpassed by 2024, with advanced economies leading the international recovery. Africa and Latin America will lag the global average, remaining below their previous peak until 2025, as emerging economies continue to grapple with high infection rates as well as vaccine supply and administrative setbacks.

International travel to the USA plummeted 76% in 2020 and is forecast to remain 67% below the 2019 level in 2021, with a full return to pre-crisis levels expected by 2024.

The return of international arrivals will be critical for achieving a full travel rebound and safeguarding tourism-related jobs, with international tourists contributing 15% to total travel and tourism spend in 2019.

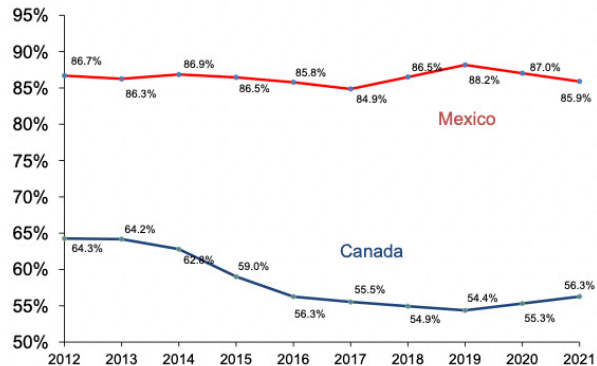
High case levels of COVID-19, combined with travel restrictions, have resulted in large falls in U.S. market share among overseas visitor markets. In 2020, the United States received 14% of long-haul travel among overseas markets, falling from 16% in 2019. Current projections anticipate a further drop in market share in 2021. The United States maintained more stable market share from Canada and Mexico given very limited overseas outbound from these markets.

US Market Share: Overseas Markets
% of global long haul



Source: Tourism Economics

US Market Share: North American Markets
% of total outbound travel



Source: Tourism Economics

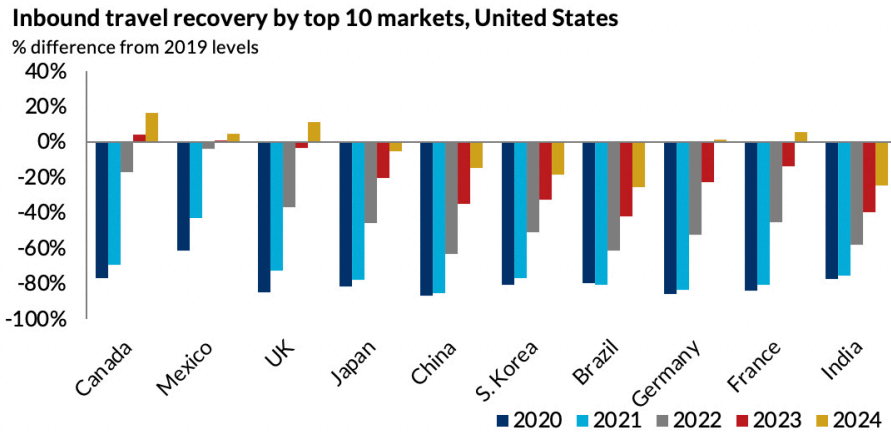
The U.S. share of North American arrivals dropped from 54% in 2019 to 42% in 2020, with restrictions preventing international travel.

As global travel resumes and restrictions are eased more meaningfully, the United States will gradually recoup this loss in market share. A rapid vaccine rollout and lower incidence of COVID-19 cases could render the USA more attractive to potential tourists as international travel gradually returns.

Short-haul travel will lead international travel recovery, with Canada and Mexico regaining 2019 levels by 2023 – the quickest rebound among the top 10 U.S. source markets. Among overseas markets, the UK is expected to rebound relatively quickly given high vaccination rates, cultural ties, and the historic resilience of the market.



GIANT SPRINGS STATE PARK,
MONTANA



Canada and Mexico will attain the quickest recovery among the top 10 source markets for the USA.

The recovery of overseas markets will be important for the United States as they accounted for almost 40% of international arrivals in 2019, but Tourism Economics does not expect pre-crisis levels to be reached until 2025. Lengthier restrictions and a lingering aversion among travelers toward faraway travel will deter longer-haul travel in the near-term. There may be cause for quiet optimism, however, with the travel industry championing the restart of transatlantic travel between the United States and Europe due to their rapid pace of vaccine rollout. The EU recently added the USA to its approved list of countries while the White House has convened working groups to help advise on and shape entry policies related to Canada, Mexico, the EU, and the UK. The UK, France, and Germany, helped by advanced vaccination rates, will lead the European arrivals to the USA, recovering 2019 levels by 2024.

Upside and downside risks face the U.S. travel outlook, with the emergence of new variants threatening travel recovery.

The international environment still faces vast uncertainty and while downside risks have been moderated by ongoing vaccine success, they have not been removed. For example, despite a remarkable vaccination speed, the UK has seen COVID-19 cases climb sharply due to the emergence and spread of the highly transmissible delta variant and now has the third-highest number of cases per million in the G20. If these new variants of concern manage to spread across countries before there is sufficient vaccine coverage, it could endanger an already fragile traveler confidence and encourage governments to err on the side of caution when easing restrictions.

In a downside scenario, international arrivals to the United States would remain below 2019 levels until 2025 – a year slower than the baseline forecast. In contrast, an upside scenario, whereby the USA manages to successfully curb potential outbreaks, has continued vaccination success, and continues to lift restrictions, would see the country record stronger growth than forecast in the Tourism Economics baseline by 2024.

A group of five people, seen from behind, are standing in a narrow slot canyon. They are wearing waders and backpacks, suggesting they are on a hike or a water-based excursion. The canyon walls are composed of layered rock, showing a variety of colors from warm oranges and reds to cool blues and greys. The lighting is dramatic, with strong highlights and deep shadows, creating a sense of depth and scale. The overall mood is one of adventure and natural beauty.

FY 2022 OBJECTIVES

ZION NATIONAL PARK, UTAH

OBJECTIVES

OBJECTIVE 1:

Help the U.S. travel and tourism sector recovery by driving international visitation and spending to the United States on a market-by-market basis as conditions warrant

- Measure 1: Inbound visitation and spending attributable to Brand USA as well as return to the U.S. economy for each dollar spent
- Measure 2: Value of attributable bookings driven through activation co-ops and partner programs
- Measure 3: Tactical campaign KPIs, such as:
 - Campaign impact on sentiment about the USA and intent to visit the USA
 - Social engagements and engagement rate
 - Impressions/CPM
 - Video views and video completion rate

OBJECTIVE 2:

Help U.S. travel and tourism industry stakeholders reengage international markets

- Measure 1: Percentage of partners engaged in international promotion with Brand USA in FY2018-2019 that return to the international market with Brand USA in FY2022
- Measure 2: Number of markets with partners reentering through Brand USA
- Measure 3: Represent all parts of the country, including rural and urban areas alike

OBJECTIVE 3:

Integrate critical themes into Brand USA recovery campaign and content efforts

- Measure 1: Integrate multicultural marketing strategy into recovery campaign and ongoing content, digital, and event platforms
- Measure 2: Integrate communication of U.S. travel policies into recovery campaign and ongoing content, digital, and event platforms
- Measure 3: Integrate other relevant themes as warranted

OBJECTIVE 4:

Maintain sound financial management and corporate governance

- Measure 1: Overhead as percentage of overall budget
- Measure 2: Compliance with Travel Promotion Act and corporate bylaws



FY2022 SUMMARY MARKETING PLAN

FAIRBANKS, ALASKA

SUMMARY MARKETING PLAN

THE ROAD TO RECOVERY

Brand USA remains in a state of readiness until market-specific gating criteria indicate a transition to recovery mode. When those conditions are met, Brand USA is prepared to quickly execute a robust recovery campaign.

REACHING TRAVELERS IN A NEW LANDSCAPE

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.

Bring to life the need for reconnection

Travel has a much deeper meaning nowadays. For our audience, it's more than just taking a trip or going on vacation. It's a chance to spend time with loved ones, to reawaken the hopes and dreams that may have been postponed during the pandemic. Our targets include families with children, couples, multigenerational families, friends, and single travelers who want to reconnect with themselves and the world.

Focus on our core messaging of possibility, proximity, and welcome

Our value proposition of proximity is more important than ever. By showcasing “only in America” travel experiences available within a five-hour drive of each of our key gateways, we can show travelers that a trip to the USA offers more bang for their buck, euro, or peso than other international destinations. This distinction is important as we expect massive competition for the frequent international traveler as borders reopen.

Provide a platform for cooperative marketing

Cooperative marketing opportunities will allow industry partners to participate in the recovery campaign, helping destinations and companies regain their international arrivals market. The co-op programs will help Brand USA promote multiple destinations and travel experiences. By engaging partners of all sizes, there is an opportunity to highlight both iconic points of interest and small-town gems that appeal to international visitors.



STRATEGIC FRAMEWORK

BUSINESS GOAL

Lead the Recovery of the U.S. Travel and Tourism Industry

MARKETING OBJECTIVES

Brand Perception, Consideration, Engagement & Bookings

CREATIVE PLATFORM

UNITED STORIES



COMMUNICATION TASKS	Prove We're Ready	Welcome the World Back	Entice and Convert
CHANNELS/TACTICS	INFLUENCERS OWNED PLATFORMS BRANDED CONTENT SOCIAL	TELEVISION ONLINE VIDEO PUBLIC RELATIONS OUT OF HOME SPONSORED CONTENT	AIRLINES OTA TOUR OPERATOR CO-OPS SEM

CREATIVE PLATFORM: UNITED STORIES

Brand USA's award-winning United Stories campaign will relaunch in 2021, building on its strong creative base and evolving in a natural progression that invites visitors to write their own American story.

We know the United Stories formula works. After three years of successful execution, we've identified best practices and optimized our storytelling for maximum impact. And, to ensure the campaign is relevant for today's travel audience, we tested our messaging to measure effectiveness and potential impact.

Overall, the creative and messaging assets tested performed exceptionally well:

- **Intent to visit:** The ad rated in the top 10% of all finished campaigns, increasing interest to visit the USA – our priority KPI
- **Perception:** Travel intent and positive perceptions increased significantly before and after ad exposure
- **Messaging:** Key messaging was successful in its intended positioning of the USA as a “diverse” “mix of people and cultures from around the world” with a “breadth of possibilities”
- **Favorability:** Favorability increased, indicating the ability for the campaign to change attitudes

We'll further develop this campaign to suit the needs of international travelers, continue to share the stories of real people and reconnection in the USA, showcase to the world the diversity of our cultures and communities, and highlight the feeling of discovering the wonder America has to offer.



CLEVELAND, OHIO

INTEGRATED GLOBAL RECOVERY PLATFORM

Cooperative Marketing

We will integrate partners across the campaign to serve consumers the most accurate and compelling vision of travel to the many wondrous destinations and attractions in the USA.

PR

Storytelling, experiential opportunities and partnerships will engage the media to support the campaign, its itineraries, partners and endorsements.

Influencers

Influencers from all over the world will embark on itineraries that span the country, sharing stories of lost and new connections and, in the process, showing the world the possibilities available when traveling in the USA.

Global Branding Campaign

Show that the USA is a unified story of experiences woven together by moments of human connection.

Airstream

Use our iconic travel trailer to highlight regional road trips that focus on U.S. destinations, points of interest, and the connections that are forged along the way.

Thought Leadership

Regional events and speaking opportunities bring together the USA's leaders across a variety of industries to share knowledge and insight.

Industry Events

Engage and excite partners, stakeholders and the media at key events such as IPW and Brand USA Travel Week.



Federal Stakeholders

Support collaborative efforts with federal agencies, from providing assets to U.S. embassies and consulates around the world to communicating travel policies and showcasing our country's national treasures.

PHASE 1: PROVE WE'RE READY

U.S. destinations eager to welcome back visitors are embracing Brand USA's new initiatives and inspirational programs targeting international travelers. The campaigns will fuel interest in U.S. destinations, resulting in continued recovery throughout the year. We're confident pent-up demand for only-in-America experiences will engage qualified travelers to book their trips.

GLOBAL INFLUENCER PROGRAM

#UnitedStories

After more than a year of interruptions and restrictions that put a new perspective on traveling, Brand USA will welcome international influencers and key opinion leaders back to the USA to share their journeys with their global audiences. With this initiative, the largest influencer outreach in Brand USA's history, we will show the USA is ready to again welcome international travelers.

#UnitedStories
New England: A collection of images and thoughts on a road trip through Maine, New Hampshire, Massachusetts & Rhode Island

+ unitedstories.com landing page

To unite all content in one place and tie together all road trips, content would be displayed on the United Stories landing page with explicit captions & photo credits on each image. Content would be uploaded on a live basis and split by each road trip to create a long lasting and strong globetrotters community.

#UnitedStories

Follow #UnitedStories and find your next travel adventure in the USA! To discover more about the stories that unite us all, follow along on [Instagram](#) and [Facebook](#).

+ We're hitting the States! Follow #UnitedStories all summer long to virtually visit them all!"

+ Shared on influencer channels

Each influencer will invite their audience to follow along all influencer content on mini site via a story with swipe up.

+ how to go further?

Talents could also create mini blogs and series of pre-trip & post-trip testimonials to feed the platforms with various experiences and references from international travelers. This could also manifest as itineraries on [VTUSA.com](#)

Shared on influencer channels

Each influencer will invite their audience to follow all influencer content on a mini site via a story with a swipe-up function.

Follow #UnitedStories and find your next travel adventure in the USA! To discover more about the stories that unite us all, follow along on Instagram and Facebook.

In addition to wide distribution across all of our global consumer social channels, we will unite influencer content in one place and tie together all road trips on our award-winning UnitedStories.com microsite. The American Advertising Federation presented our United Stories website with a Mosaic Award, which recognizes companies, agencies and individuals whose commitment to diversity and inclusion is evident through their creative work and organization-wide initiatives.

Road trips overview

Road trip itineraries will cross the country north to south and east to west, showcasing the ease of travel in the United States, the warmth of its people, the amazing landscapes, and the adventures to be had along the way.





PHASE 2: WELCOME THE WORLD BACK

For the second phase of recovery, we'll let the world know we are ready to welcome visitors back to the United States. Specific media campaigns targeting travelers will deliver the message that all parts of the USA are ready for them to explore and create lasting memories. We'll use Television, Online Video, Public Relations, and Out Of Home to spread the word.

MY USA STORY: INSPIRING CONTENT

The American story is written by everyone. Each chapter different from the next, each page transcribed from travelers and locals alike. Our story is written by different genders, generations, colors, cultures, and communities. It's a story of wide-open spaces, open restaurants, and open hearts. Of the breathtaking diversity of our lands and our people. Of warm welcomes, adventures and around every turn, lifelong memories made. Our United Story is written with ellipses, never a period. And we ask visitors to write their story here, and extend ours. Here in the United States, there's a page waiting for you. It's time to write your story.



ALBUQUERQUE, NEW MEXICO

PHASE 3: ENTICE AND CONVERT

To entice international visitors to convert their interest into bookings, we'll get assistance from the travel trade, tour operator cooperatives and other affinity partners. Our campaigns will also utilize airline programs, OTA and SEM. This will create a complex and robust media strategy.

The United Stories campaign will retarget engaged consumers with sequential content and a call to action that drives active consideration. Working with OTA, airline, and tour operator partners, the goal of this campaign is to create inspiration and generate bookings.

Each phase of the campaign will be executed sequentially and in accordance with market and fiscal conditions.



RECOVERY STRATEGY

GOUSA TV



In 2019, we refined and simplified our strategy for GoUSA to: More people watching more content for more minutes. Through a focus on the three components of this strategy - people, content, minutes - we grew GoUSA, expanded viewership, launched new distribution partnerships and diversified viewing environments.

As we look forward to 2022, we will continue pursuing our strategy with new and refined tactics.

STRATEGY More people watching more content for more minutes.

TACTICS

More People

Continue to expand distribution channel relationships (streaming and linear) to provide more environments to expose people to GoUSA content.

More Content

Continue to source original and compelling content based on formats currently performing well on GoUSA. Source from networks and DMO partners.

More Minutes

Continue to refine data analytics to discover what works best on GoUSA to expose viewers to related/adjacent content through marketing efforts.



GOUSA TV NOW AVAILABLE ON:



GIANT-SCREEN FILM

INTO AMERICA'S WILD



In February 2020, Brand USA launched its third giant-screen film, *Into America's Wild*, in theaters all over the world. While the pandemic cut short global promotion for the film, we plan to relaunch in FY2022. Narrated by Morgan Freeman, the film features astronaut John Herrington, the first member of a federally recognized tribe (Chickasaw) to travel to space, and Ariel Tweto, an accomplished private pilot, public speaker, and TV personality who gained worldwide fame for her appearance in the hit reality series *Flying Wild Alaska*. This cross-country journey showcases some of the most beautiful but little-known landscapes of North America. From the wilds of Alaska and the lush coastline of Oregon, to the ancient canyons of the Southwest and the rolling hills of the Appalachian Trail, *Into America's Wild* is a nonstop ride via kayak, train, bike, hot-air balloon and more that explores the allure of wild places and the human connection we share with the natural world.

National Parks Adventure, our first giant-screen film, which recently completed its three-year run on Netflix, is now available to millions of international travelers on our GoUSA TV streaming video platform. *America's Musical Journey*, our second giant-screen film, is available to audiences all over the globe on Amazon Prime and everywhere that GoUSA TV is distributed.



PARTNER PROGRAMMING

Brand USA's programs serve to inspire international travelers to visit the USA through its gateways and beyond. Co-op marketing helps partner destinations of all sizes to join together and increase awareness and visitation by targeting potential travelers in international markets that they could not reach on their own.

GLOBAL INSPIRATION PROGRAM

With a fully revamped strategy for 2022, the new Global Inspiration Program is better positioned than ever to promote destinations to travelers from key markets through engaging, in-language content, and a robust, targeted international media campaign designed to drive measurable results.

New program efficiencies will provide an expanded digital reach in international markets, measurable results, and an enhanced platform to ensure international travel benefits all areas of the country.

Key components include:

Targeted Media Distribution

Media distribution will be targeted to a more detailed and measurable level, enabling distribution of content to the markets and demographics where it will achieve the highest performance.

Digital Content Hub

Engaging content will be the centerstone of an interactive hub on Visit The USA's global websites. The design features a linking strategy to amplify content throughout the platform.

Reimagined Print Guide

Still an amazing and inspirational print guide, the new version will feature editorial-driven content designed for both travelers and travel planners. Distribution efforts will focus on priority markets and key international events.

MULTI-CHANNEL PROGRAM

This program reaches consumers through leading social and booking platforms, such as Facebook, mobile takeover ads and Expedia, in addition to inflight entertainment systems and some print components. Highly targeted media distribution will ensure efficient and cost-effective messaging, resulting in more bookings to communities throughout the United States.

MULTICULTURAL STRATEGY

SHARING LOCAL TRAVEL EXPERIENCES TO PROMOTE THE DIVERSITY OF THE USA

Brand USA is proud to fully integrate inclusive and diverse marketing into the organization's foundational pillars and its marketing efforts. This strategy is about tapping into the cultural fabric of the USA and celebrating hyper-local experiences that showcase the diversity of the country. This always-on initiative highlights culturally rich, partner-developed content and provides a platform to showcase these notable experiences. Together with our partners, we'll highlight the diverse voices, communities, businesses, and neighborhoods that make up the fabric of the USA.

Key Benefits

- Opportunity for partners to provide materials for ongoing custom content creation across Brand USA platforms
- Amplify our "Many Voices" strategy and showcase diverse businesses and experiences
- Provide inspiration, education, and planning resources to both consumer and travel trade audiences

PROMOTIONAL PLATFORMS

Through storytelling and promotion via Brand USA's marketing channels, we will amplify the diverse voices, multicultural travel experiences, and itineraries that truly make the United States unique.

Dedicated Content Hub

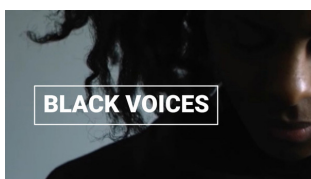
A dedicated content hub will showcase travel options that celebrate the rich diversity in the USA. The hub will also feature content highlighting diverse-owned businesses.

New Content Creation

Content will be integrated and showcased across various platforms including, but not limited to, VisitTheUSA.com, GoUSA TV, social campaigns, the USA Discovery Program, and more. We will also integrate this approach into cooperative marketing programs.

GoUSA TV

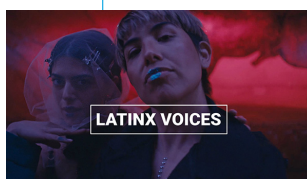
Brand USA's premier streaming video channel showcases the wide variety of multicultural experiences available to travelers via curated video playlists, including:



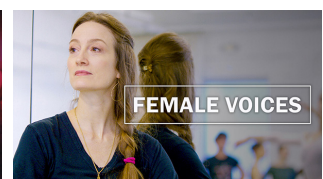
BLACK VOICES



NATIVE VOICES



LATINX VOICES



FEMALE VOICES

FAST FACTS: CULTURAL TOURISM

- Is one of the fastest-growing segments of the tourism industry, **accounting for 40% of all tourism worldwide.**
- **Expands businesses and job opportunities** by drawing on cultural resources as a competitive advantage in tourism markets.
- Is a major source of employment globally and considered by many countries around the world as a core priority to **stimulate job creation, notably for youth.**
- Increases "my knowledge/understanding of cultures" was one of the top personal considerations for international travel, according to a recent Brand USA sentiment survey.

Source: Cutting Edge | Bringing cultural tourism back in the game, Jan. 3, 2021

TRAVEL TRADE INITIATIVES

GLOBAL MARKETPLACE

Brand USA Global Marketplace is a custom-built, always-on, virtual platform that provides access to a diverse range of U.S. destinations, attractions, and points of interest for the international travel industry. The digital platform solves the need for the U.S. travel community to engage with the global tourism industry while international travel is limited.

With opportunities for one-to-one B2B meetings, educational sessions about the USA and its destinations, enrichment series and videos, and access to marketing collateral, the Brand USA Global Marketplace has proven to be an important and engaging tool for our destination and industry partners.

Ongoing one-to-one meetings, training events, and workshops will continue to be offered to agents from around the world. And in FY22, we anticipate launching phase two of the platform, an international buyer pavilion that will include in-depth market profiles, research, programming and travel trade directories.

USA DISCOVERY PROGRAM

Providing tour operators with the tools needed to craft diverse itineraries for international travelers, the USA Discovery Program is an educational platform for Brand USA partners to highlight their destinations. Whether it's popular accommodations and must-visit places or historic facts and local restaurants, the USA Discovery Program offers comprehensive overviews of states, cities and popular experiences, including the Blue Man Group, one of the most recent participating partners. In the past year, record numbers of travel agents and tour operators became accredited as USA Specialists, or experts, upon completing requirements for special badges. The program also features MegaFams, events, webinars, and peer-to-peer learning.

DESTINATION 101 VIDEOS: TRAINING VIDEOS FOR THE TRAVEL TRADE

Partners educate the travel trade about their destinations with a new, highly engaging and informative video program. Designed as an easy-to-understand, introductory training tool, videos help travel agents learn about U.S. destinations through eye-catching visuals, key travel information, and intriguing facts relevant to today's international visitors.



TOUR OPERATOR COOPERATIVE PROGRAMS

Brand USA's trade-focused programs are cooperative marketing opportunities that are both B2C and B2B. They reach the travel trade via media, events, or PR channels, and may include a tour operator component such as road trip itineraries. Available markets include Australia, Brazil, Canada, China, France, Germany, India, Japan, Mexico, South Korea, and the United Kingdom.

A woman in a light blue shirt and pink pants is walking away from the camera on a wide, paved path. The path is lined with tall palm trees on the left and lush greenery on the right. In the background, several modern high-rise buildings are visible under a clear sky. The overall scene is bright and sunny, suggesting a warm climate.

MARKET SELECTION AND ALLOCATION

MIAMI, FLORIDA

STRATEGIC APPROACH TO

MARKET SELECTION AND ALLOCATION

Brand USA focuses on the markets, target populations, and media channels that allow it to optimize performance against the mission of growing international arrivals and spending. An analysis of the global travel landscape helps the organization concentrate 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).

Brand USA traditionally utilized a weighted, 10-factor market selection model to determine the primary target markets each year, and the optimal level of investment, to achieve the most incremental growth potential. As COVID-19 spread around the world, Brand USA adjusted this approach and published a new set of gating criteria to be used in lieu of the standard selection and prioritization model until travel is normalized and people are once again able to travel freely with minimal restrictions. Brand USA will continue to utilize gating criteria to determine the readiness of each target market to launch the recovery campaign.

Yet as the world emerges from the pandemic, it is critical for Brand USA to reevaluate where and how we deploy our current and future resources, both to drive recovery and serve the long-term mission. Brand USA will develop a new framework to drive market selection and resource allocation decisions and to advise industry stakeholders of the same. This framework will provide a data-driven methodology to continually evaluate markets and adjust both priorities and specific market objectives based on strengths and weaknesses identified in the analysis. The framework will include more than a dozen indicators to quantify travel market size, spending power, growth prospects, and potential responsiveness of each market. While still in the planning stages during the final quarter of FY2021, the model might look something like this.

Category

Component

OPPORTUNITY

Travel Market Size
Country Size
Market Growth
Headroom

PROPENSITY

Sentiment
Alignment

VALUE

Purchasing Power
Visitor Value
Affordability
Market Presence

CONSTRAINTS

Risk
Accessibility



A scenic view of a tropical coastline with two women sitting on a rocky cliff overlooking the ocean and mountains. The image shows a lush green mountain range in the background, a turquoise ocean with a sandy beach, and two women with long blonde hair sitting on a dark rock in the foreground, looking out at the view. The sky is blue with some clouds.

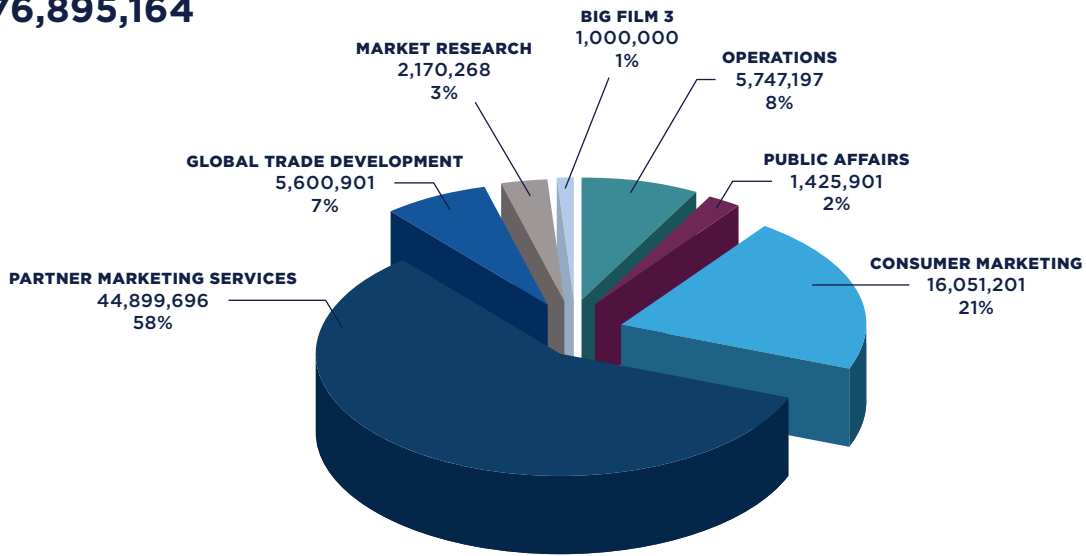
FY2022 SUMMARY BUDGET

KAUAI, HAWAII

SUMMARY BUDGET

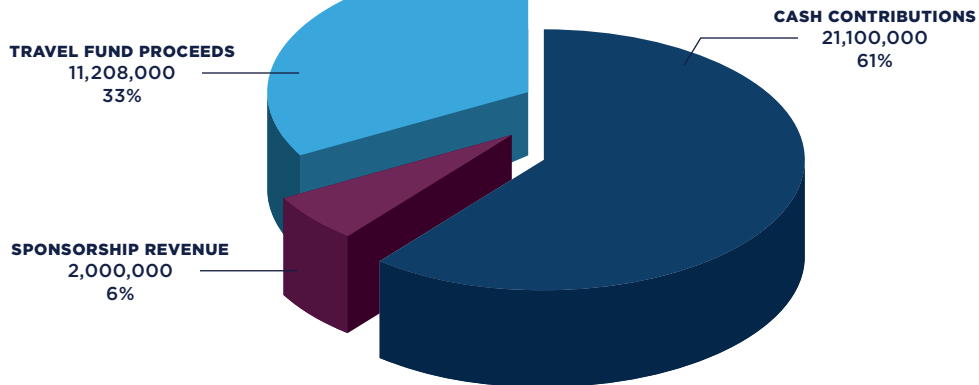
FY 2022 EXPENSE BUDGET

\$76,895,164



FY 2022 REVENUE BUDGET

\$34,308,000



The FY2022 revenue and expense budgets are based on uncertain market and fiscal conditions. Brand USA will remain at a low monthly spending rate until market-by-market criteria are met to transition from a state of readiness into recovery mode. The revenue budget is based on minimal available matching funds in FY2022 because of low ESTA collections during FY2021. The expense budget is higher than the revenue budget as Brand USA has managed its reserves through the pandemic to ensure adequate resources for long-term business continuity and recovery efforts while normal revenue streams remain depressed.

FY2022 SUMMARY BUDGET

BUDGET ITEMS OVER \$450,000

VENDOR	DESCRIPTION	EXPENSES RANGE
Farragut Center	Rent	\$1.2 million
U.S. Travel Association	Sponsorship	\$1.4 million - \$1.75 million
Hylink	Digital development, social media management, and trade representation	\$500,000 - \$750,000
Edelman	Global consumer and corporate public relations and community management	\$1 million - \$1.5 million
Hills Balfour	UK and European trade representation	\$1.5 million - \$2 million
Miles Partnership	Cooperative marketing services	\$3 million - \$3.5 million
Discovery Network	Global digital and television advertising space	\$1 million - \$1.5 million
Beautiful Destinations	Content development and distribution	\$1 million - \$1.5 million
SDL	Translation services	\$500,000 - \$750,000

BRAND USA












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

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-  TheBrandUSA.com
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FOR INFORMATION ABOUT EXCEPTIONAL AND UNEXPECTED TRAVEL EXPERIENCES IN THE UNITED STATES, PLEASE VISIT OR CONNECT WITH US ON OUR CONSUMER CHANNELS:

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 -  Available on Roku, Apple TV, Amazon Fire, iOS, and Android
-     

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AUGUST **2021**

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