

FY2023

OBJECTIVES AND BUSINESS PLAN



VisitTheUSA.com

Brand USA

NATIONAL MARINE SANCTUARY OF AMERICAN SAMOA



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 one 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 a unique destination.

According to studies by Oxford Economics, over the past nine 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, more than 40,000 incremental jobs each year.

Brand USA's operations are supported by a combination of nonfederal 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**.



WASHINGTON, D.C.

STATEMENT OF PURPOSE

OUR VISION

Travel enriches lives and benefits communities through welcoming the people of the world to the USA

OUR MISSION

Contribute to community prosperity throughout the USA by marketing the welcome, driving international visitation, and clearly communicating U.S. travel policy

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

MARKET THE WELCOME

Convey a welcoming message and communicate travel policies to facilitate confident, informed visitors

BUILD AND MAINTAIN TRUST

Demonstrate our integrity through inclusion, transparency, and compliance to cultivate trusted relationships with our global community of stakeholders

CREATE INNOVATIVE MARKETING

Promote travel to the entirety of the USA to support the wide variety of communities within and beyond our gateways

ADD AND CREATE VALUE

Pioneer marketing solutions on behalf of our industry to leverage the USA brand in ways only possible at the national level

DRIVE RESULTS

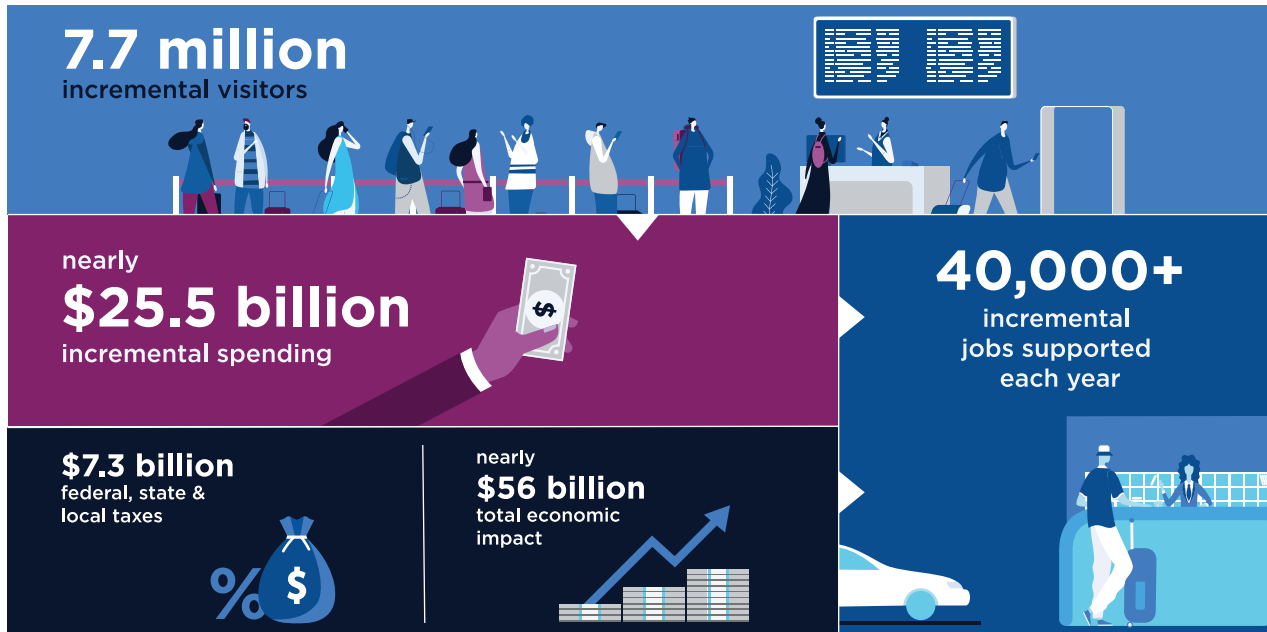
Use performance data from macroeconomic returns and other key indicators to optimize resources against our multifaceted mission



ECONOMIC IMPACT

As one of the best levers for driving economic growth, international travel to the United States supports more than one million American jobs and benefits virtually every sector of the U.S. economy. The international segment of the travel economy is especially high-value because visitors from abroad on average spend more time and money, and visit more destinations than domestic travelers. Since its founding, Brand USA has worked with thousands of 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.

For the nine years from FY2013 through FY2021, including two years of a near-complete halt to global travel, the cumulative results of Brand USA's marketing efforts totaled:



Importantly, approximately half the jobs supported are outside the travel and tourism industry, including manufacturing, construction, finance, retail, and more.

Visit TheBrandUSA.com for more information.

ABOUT THIS PLAN

Brand USA's FY2023 business plan comes at a crossroads for the U.S. travel and tourism industry.

Three major factors intersect in mid-2022 that will set the table for the next several years and that thoroughly influence Brand USA's objectives, marketing plans, and budget for the fiscal year that runs from October 1, 2022 – September 30, 2023.

First, with the reopening of U.S. borders to international travelers in November 2021 and the subsequent removal of the predeparture COVID testing requirement in June 2022, the sector is poised for a robust recovery. This is a welcome development for communities and businesses across the country that rely on international visitor spending. These communities will benefit from renewed international visitation across a host of areas, from jobs and sales figures, to the public services paid for by incremental tax revenues, to connectivity with the larger world, and more. While international arrivals to and spending in the United States are projected to grow rapidly through 2022, a slower growth pace is forecast between 2023-2026 with a full recovery to prepandemic levels (volume and spending) reached in 2025.

Second, U.S. Secretary of Commerce Gina Raimondo, on behalf of the Tourism Policy Council, launched the new National Travel and Tourism Strategy in June 2022. The new strategy focuses the full efforts of the federal government to promote the United States as a premier destination and to foster a sector that drives economic growth, creates good jobs, and bolsters conservation and sustainability. Drawing on engagement and capabilities from across the federal government, the strategy aims to support broad-based economic growth in travel and tourism across the United States, its territories, and the District of Columbia. The federal government will work holistically and in partnership with Brand USA and the private sector toward the ambitious, five-year goal of welcoming 90 million international visitors annually, who will spend \$279 billion each year by 2027.

Finally, H.R. 2471, the "Consolidated Appropriations Act, 2022," made available \$250 million in extraordinary funding to buttress Brand USA's finances and help rebuild the international visitor economy for the long haul in states, cities, and towns throughout the country. The supplemental funding is derived from the same portion of the Electronic System for Travel Authorization (ESTA) fee paid by Visa Waiver Program travelers as Brand USA's normal federal matching funds.

However, the new funds are drawn from ESTA collections between 2010 and 2020 that exceeded the maximum \$100 million available to Brand USA in each of those years. Of the total supplemental funding, \$50 million is subject to the normal matching funds process and \$200 million has already been made available by the Secretary of the Treasury.

While there are many other factors at play in the world, all three of these primary dynamics call for a long-term strategy. Therefore, Brand USA's FY2023 business plan is also the opening chapter of a longer, three-year time horizon. This rolling multiyear approach will enable Brand USA to present its annual plans and reports in a more strategic framework on the road to 2027. While each individual plan will still contain objectives, a marketing plan, and budget for the coming fiscal year, these activities and outcomes are waypoints toward the longer-term goals of the National Travel and Tourism Strategy. This three-year approach takes the organization through FY2025 and to the cusp of a series of major happenings beyond, including the United States' semiquincentennial (the celebration of the 250th anniversary of the signing of the Declaration of Independence) and the World Cup in 2026, the national strategy goal in 2027, the Summer Olympics in 2028, and several others.

Over the coming three years, Brand USA will regain sustainable financial footing, drive economic vitality in communities around the country, and facilitate the industry's long-term (re)entry into established and emerging international markets. These overarching objectives will better position the United States in the fierce global competition for travelers and will allow Brand USA to continue to add value for industry stakeholders of all levels of budget and sophistication.




In reading this plan, it is important to keep in mind both the scope of the task at hand and the specific ways in which Brand USA optimizes its impact. First, the task itself is massive: to promote the entirety of a country as vast and diverse as the United States in a way that is relevant and compelling across linguistic, cultural, and political boundaries throughout the world. It is not possible to meet this charge with a simple, one-size-fits-all model or a 30-second spot. Instead, Brand USA finds success by empowering the many voices that exist in the United States to tell their unique stories.



Second, Brand USA does not have any commercial interests; instead, the organization drives demand and facilitates critical connections between U.S. travel suppliers and international travel buyers and media. In marketing terms, Brand USA lives at the very top and very bottom of the marketing funnel—driving consumer inspiration at the top level, and then working to ensure relevant booking channels reflect this expanded and deepened demand. Within the travel lifecycle, this means Brand USA does not sell a trip or deliver an experience on the ground but plays a crucial role prompting potential travelers to dream about and research specific destinations and experiences and then asking visitors to contribute their stories on the back end.

This document will detail the state of play in key regions and source markets for international travel to the United States and provide a market prioritization model to show how Brand USA will allocate resources in FY2023. It will delve into the types of ongoing and brand-new programming Brand USA will pursue to inspire consumers and engage with the travel trade and channels to consumers. It will review Brand USA's specific objectives for FY2023 in the context of the longer-term overarching objectives noted above. Finally, the document will detail how Brand USA will be resourced against these objectives and marketing approaches in FY2023 and beyond.

Brand USA's FY2023 business plan further details the use of extraordinary relief funding allocated by Congress to Brand USA through passage of the Restoring Brand USA Act. Per the terms of that legislation, Brand USA previously submitted to Congress the required report on expected use of the funds. A portion of those funds will be used within the bounds of the coming fiscal year.

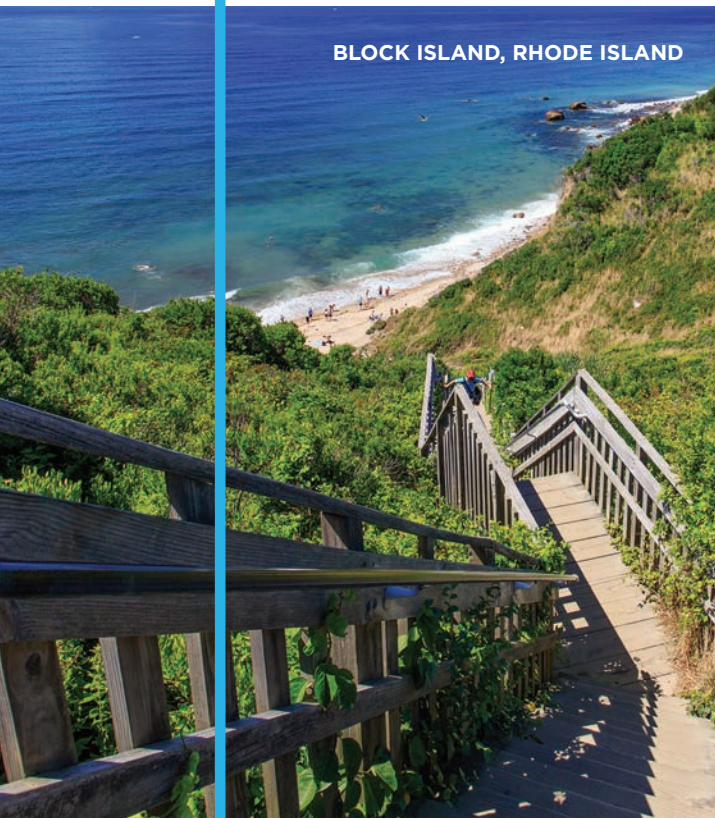
A photograph of a person in a red jacket and dark pants standing on a dirt path in a lush, moss-covered forest. The trees are heavily covered in green moss and hanging lichen. The ground is covered in fallen leaves and ferns. The scene is brightly lit, suggesting a sunny day. The text "GLOBAL OUTLOOK AND MARKET SELECTION" is overlaid in large white letters in the center of the image.

GLOBAL OUTLOOK AND MARKET SELECTION

OLYMPIC NATIONAL PARK, WASHINGTON

GLOBAL OUTLOOK

BLOCK ISLAND, RHODE ISLAND

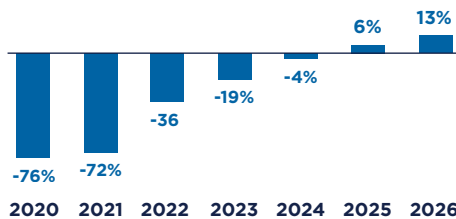


The recovery of global travel is well underway from the lows of 2020 and 2021.

This comes despite disruptions from Russia's invasion of Ukraine, continued travel restrictions in some countries, and economic constraints. Tourism Economics' latest estimate (June 2022) is for international arrivals to the United States to reach approximately 65% of 2019 volumes in 2022 and surpass pre-pandemic levels by 2025.

Travel to the United States from some regions of the world will recover sooner than others—mainly, though not exclusively, due to travel distances. As a result, short-haul international travel is expected to recover relatively quickly, while medium-haul travel (between subregions within a region) and long-haul travel (travel between major regions) will recover at a slower pace. Below is an overview of key regions and source markets.

International arrivals to the USA
% difference from 2019 levels



Source: Tourism Economics



MANDAN, NORTH DAKOTA

THE AMERICAS

NORTH AMERICA

Due to proximity, cost, and familiarity, travel among North American countries is expected to recover quickly, similar to travel within Europe.

Together, Canada and Mexico accounted for slightly more than 50% of total U.S. arrivals in the decades before the pandemic and up to 60% during 2020 and 2021. According to Tourism Economics' latest forecast, international arrivals to the USA from North America are expected to reach nearly 76% of 2019 levels in 2022. Combined arrivals from Canada and Mexico are projected to fully recover to prepandemic levels in 2024.

In 2022, visitation from Canada will recover to 32% below 2019 volume after dropping to below 80% in 2020-21. Arrivals from Canada to the USA are projected to surpass 2019 levels in 2024. Similarly, visitation from Mexico in 2022 is expected to be down only 15% from where it was in 2019. During the pandemic, Mexico visitation did not decline nearly as much as Canada; however, it could take Mexico until 2025 to fully recover as the annual visitation growth will be smaller than that of Canada, mainly caused by economic constraints.

Canada will be the largest contributor of international visitation to the United States over the next three years (2022-25), accounting for nearly one-third of the United States' total inbound visitation.

CENTRAL AMERICA, CARIBBEAN, AND SOUTH AMERICA

In 2022, combined inbound visits to the United States from Central and South America and the Caribbean are forecast to total 6.5 million, or 27% below 2019 levels. International visits from this entire region are expected to reach 2019 levels in 2025.

Argentina, Brazil, Colombia, Dominican Republic, and Ecuador are forecast to be the largest contributors to the United States inbound tourism growth from this region in the next three years.

EUROPE

WESTERN EUROPE

According to Tourism Economics' latest forecast, outbound travel to the United States from Western Europe in 2022 is expected to be 35% below 2019 levels. Recovery from the largest European markets will be driven by the ease of COVID-related restrictions and the strong familiarity of the United States. In addition, the conflict in Ukraine is deterring a portion of outbound travel from Western Europe that would normally accrue to Eastern European countries or even to Asia, due to safety and air space disruptions.



Recovery of travel to the United States from Western Europe will be led primarily by the U.K., Germany, and France, which account for around two-thirds of total visitation to the USA from Europe. Each of these markets is forecast to individually reach prepandemic visitation levels by 2024. Furthermore, Italy, Spain, Ireland, and the Netherlands will be near 2019 visitation in 2024, helping boost Western Europe's recovery of inbound visitation to the United States.

CENTRAL AND EASTERN EUROPE

Central and Eastern European travel to the United States is expected to register more modest growth in 2022 than inbound travel from Western Europe. Russia's invasion of Ukraine deferred overall recovery from this European subregion. However, markets like Poland and the Czech Republic are forecast to reach 2019 visitation levels sooner than the other Eastern European markets.

ASIA-PACIFIC

The latest Tourism Economics forecast for 2022 sees international travel to the USA from Asian markets to amount to less than one-third of 2019 arrivals from the region. This lag is primarily driven by the slow recovery from the largest Asian source markets: Japan, China, South Korea, and India. Similarly, international arrivals from the Pacific region are expected to recover to one-third of the region's inbound travel in 2019, mainly driven by the slow recovery from Australia and New Zealand, the two largest markets, as a result of their stringent COVID-related restrictions.

Before the pandemic, China had become the world's second largest outbound market in terms of visitors and the number one in terms of spending. China's outbound travel is expected to recover more slowly in the short-term than any other large source market, due to the Chinese government's strict "zero COVID" policy, which restricts inbound travel to China, including residents returning home.

Despite the slow growth in the next couple of years, outbound travel from China is expected to catch up and eventually outpace the other four largest source markets for global travel by 2026 (USA, Germany, U.K., and France).

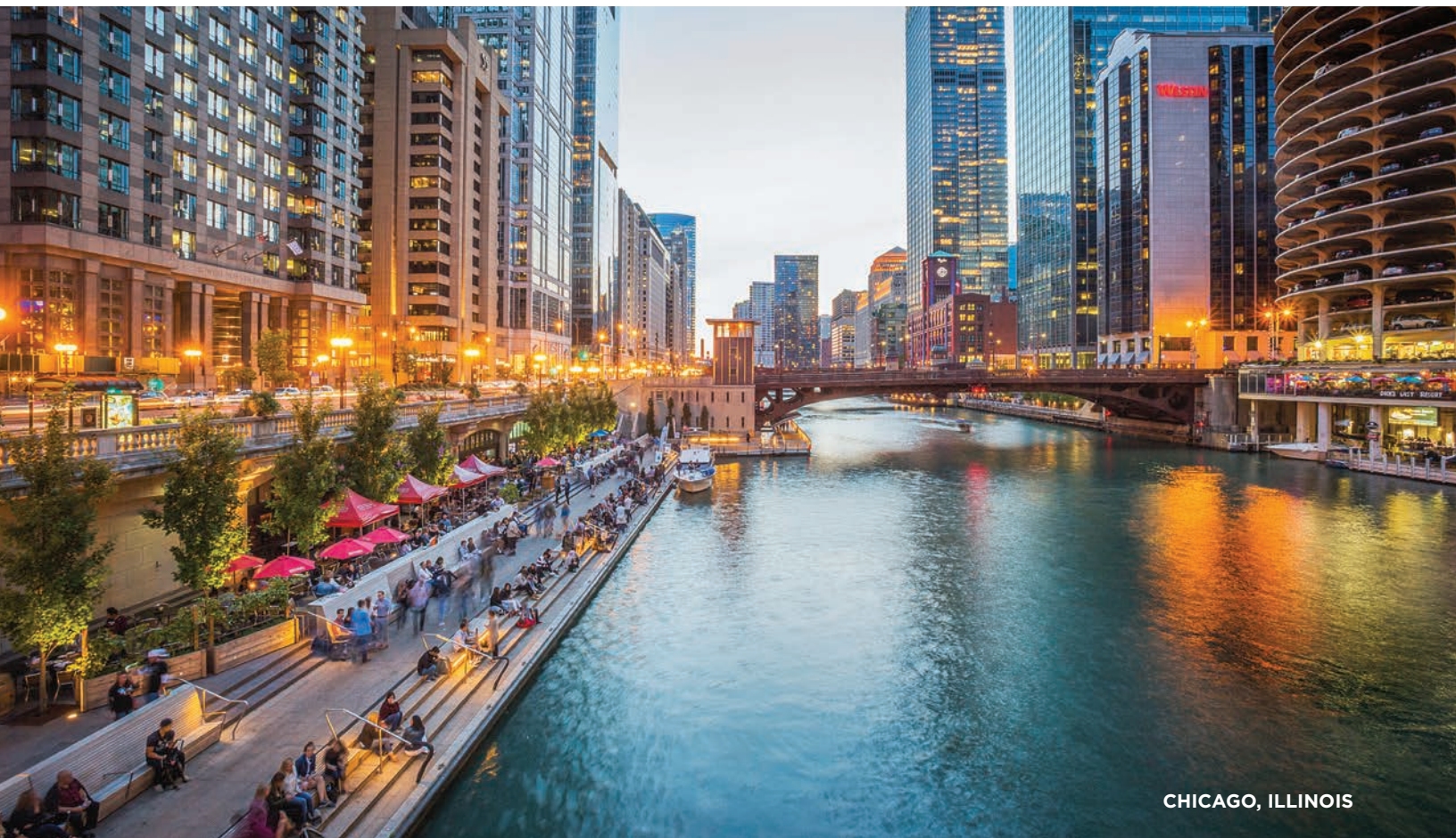
Prior to the pandemic, China was the number two source market from Asia for total arrivals to the USA, following Japan. Visitation from China to the United States in 2022 is forecast to grow to only 15% of 2019 visitation and to reach 2019 levels by 2026.

Japanese visitation to the United States is expected to register similar growth patterns to the Chinese, with a forecast of 16% of 2019 visitation in 2022 and to surpass 2019 levels by 2025. South Korean visitation is expected to have a slightly higher growth rate; however, it is forecast to reach only around one-third of 2019 total visitation in 2022.

India is the only source market from this region that is expected to approach nearly 80% of 2019 levels of travel to the United States in 2022. However, India's year-over-year growth will be lower than the other three major Asian markets because its decline in visitation during the pandemic was not as severe as the other markets. Inbound visitation to the United States from India is also forecast to reach 2019 levels by 2025.

Inbound travel from Australia to the United States is forecast to almost reach 2019 levels by 2024 (98%) and surpass it one year later; whereas, visitation from New Zealand will register a slightly lower growth for 2024, but is expected to eclipse 2019 levels by 2025.





CHICAGO, ILLINOIS

AFRICA AND MIDDLE EAST

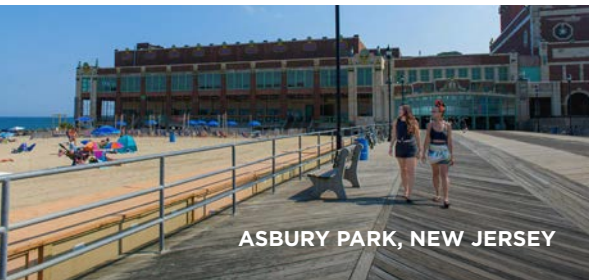
International arrivals to the United States from Africa and the Middle East, combined, will take longer than the other regions to fully recover to prepandemic levels. Tourism Economics forecasts visitation from this region to exceed 2019 levels by 2026, primarily because of Africa's modest recovery. The majority of Middle Eastern countries will reach 2019 levels by 2025.

Inbound travel from Israel represents around 50% of total Middle Eastern visitation to the United States. In 2022, Israeli visitation to the USA is forecast to reach 356,000, which is 20% below 2019 levels; and is expected to recover to 2019 levels in 2024.

Saudi Arabia and United Arab Emirates, the other two largest outbound travel markets to the USA account for 30% of total visitation from the Middle East.

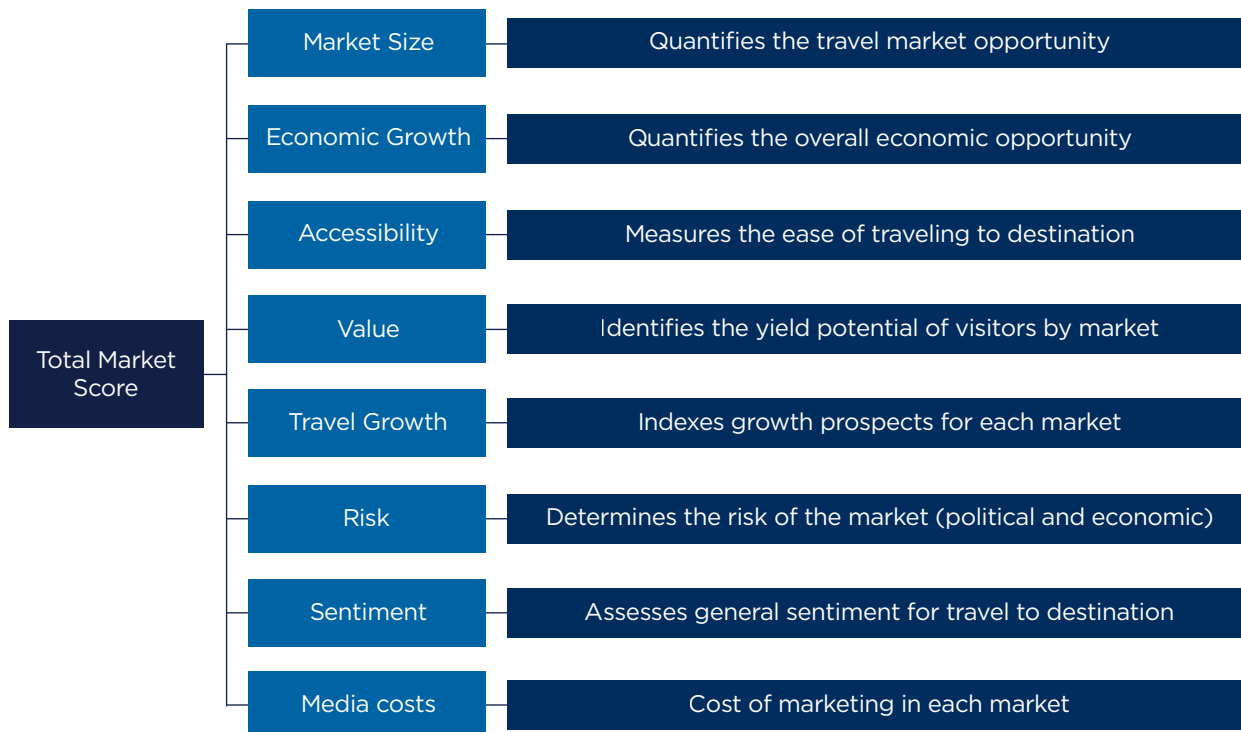
Visitation to the United States from Nigeria, South Africa, and Egypt, which combined represent nearly two-thirds of the total visitation from Africa to the USA, are expected to be very close to 2019 levels by 2025.

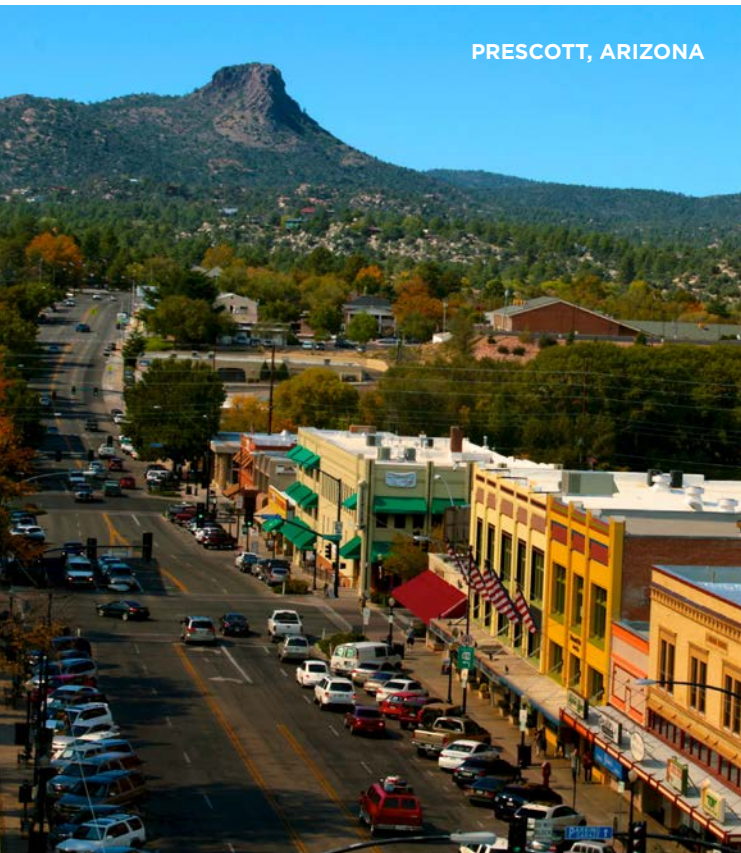
MARKET SELECTION



Brand USA focuses resources on markets, target populations, and media channels to optimize performance against the mission of growing international arrivals to the USA and ensuring the benefits of spend accrue to communities throughout the country. In the wake of the uncertainty and constant change due to the pandemic, it is important for Brand USA to take a holistic analysis of the opportunities across all existing target markets as well as new potential markets.

Brand USA has partnered with Tourism Economics to revisit its market selection model and build a standardized scorecard to guide resource allocation. The current model includes 32 indicators to quantify travel market size, spending power, growth prospects, and potential responsiveness to travel promotion. These indicators are aggregated to a total market score, which is used as the baseline to determine spending allocation.





PRESCOTT, ARIZONA

Market-specific objectives and other factors also help determine target markets, channel mix, and type of campaigns that will be deployed in each market.

More important indicators, such as inbound arrivals and airlift to the United States, will receive higher weighting in the framework to ensure the funds entrusted to Brand USA are put to their best use. Brand USA has a responsibility to promote the entirety of the United States, both urban and rural, well-known and lesser-known, state or territory, and so forth. Different areas of the country have differing levels of connectivity to and presence in source markets around the world. For example, a market like the U.K. might be mature for major gateway cities, like New York and Miami, while still an emerging market for a state or city without a major gateway airport or history of international promotion. Brand USA’s resource allocations will reflect these realities in addition to the results of the new scorecard.

For FY2023, the market allocation model yields the following results, which Brand USA uses as the base for the market prioritization.

1	Canada	9	Australia	15	Netherlands
2	Mexico	10	France	16	Switzerland
3	U.K.	11	Brazil	17	Ireland
4	Germany	12	Italy	18	Sweden
5	China	13	Spain	19	Colombia
6	Japan	14	Nordic Countries (Norway, Denmark, Finland, Sweden)	20	Chile
7	South Korea				
8	India				



FY2023 BUSINESS AND MARKETING PLAN

ATLANTA, GEORGIA

BUSINESS AND MARKETING PLAN

The past decade has seen significant evolution in the way people travel and consume media and how Brand USA markets and engages its world of stakeholders. This evolution is important to understand the strategies and lessons Brand USA carries forward as the industry comes out of the pandemic and gets back on its feet.

As consumers' media habits shifted from traditional channels to more individualized experiences, the one-size-fits-all model became less effective and marketers turned increasingly to digital platforms in place of relatively outmoded methods of communication. Recognizing the consumer path to purchase is not a straight line and includes many different touch points along the way, Brand USA took advantage of these shifts to better reach the right people, with the right message, at the right time on the device of their choosing.

The “many voices” content strategy orchestrated a concert of voices from U.S. citizens to international visitors, to tourism experts, to the creative class that conveyed a broader and more authentic set of narratives about travel in the USA. The “mobile to giant screen and everything in between” distribution strategy optimized storytelling to the consumer mindset on each of a series of delivery platforms — phones, tablets, laptops, billboards, and IMAX screens. Together, these strategies allow Brand USA to leverage authentic and welcoming stories told from local perspectives and global influencers, as well as to invite travelers to share their own USA travel experiences.

This section details Brand USA's approach to consumer outreach, travel trade engagement, and organizational refinement over the next three years.

The specific objectives for FY2023 are detailed in the next section of the plan.



CONSUMER MARKETING

The most direct way Brand USA pursues its mission to drive incremental international travel to the United States is to communicate to potential travelers in key source markets around the world. Potential travelers can be found in a variety of settings—the light rail commuter, the social media scroller, the family at the museum, the couple browsing streaming platforms, and even the business traveler heading to her convention. Brand USA's broad based demographic targeting means that general media consumers in Brand USA's target markets are potential travelers to the United States.

Brand USA's consumer marketing tactics—digital, social, broadcast, print, out-of-home, and various multi-media strategies—are fundamental to reach, engage, and inspire travelers to visit the USA. The media mix, the seasonality and timing, and even the messaging and imagery are tailored to consumer proclivities, consumption habits, and efficiencies within markets. Consumer outreach takes many forms, and in all cases the purpose is to communicate the right message at the right time through the right channels to influence travel dreaming and planning. Some efforts are undertaken by Brand USA alone, whereas others are conducted along with industry or government partners. Some efforts involve significant media buys, while others are earned through events and targeted outreach. Some are more inspirational, others more informational. Here are some of the key consumer engagement strategies Brand USA will pursue in FY2023 and beyond.

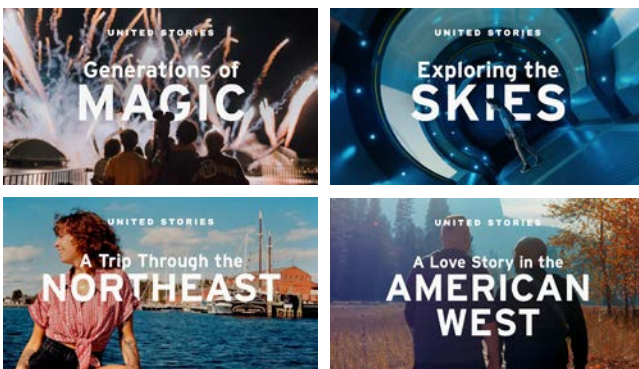
UNITED STORIES

United Stories is an award-winning campaign that takes viewers on the road through the eyes of influencers, storytellers, and locals as they visit hidden gems, cultural meccas, attractions, events, and points of interest throughout the country. This approach leverages authentic and compelling voices, and focuses on the real human experience of reconnecting and uniting through travel. It is an effective tool to highlight the diversity of the people, places, and unique experiences that make the USA the world's most aspirational destination

United Stories will continue to feature road trips across the USA with a focus on Brand USA's travel trade/insider guide itineraries covering multiple states and regional trips. The priority is to use the creative assets for high-level inspiration on digital and social channels and to

leverage them with tour operator calls-to-action to drive consumers down the marketing funnel toward booking an actual trip to the USA.

United Stories will continue to spark curiosity and a sense of possibility while also evolving new thematic concepts that focus on the emotion that a destination can evoke in a traveler. Alongside versatile and informative new content formats, this evolution will encourage multiple viewings by potential travelers.





GoUSA TV

GoUSA TV is Brand USA's connected television network. It is available for free via linear channels and on-demand apps, effectively capitalizing on millions of global households cutting cable and satellite delivery services. The channel attracts viewers with its range of original and licensed episodic travel entertainment content including documentaries and films about U.S. destinations and experiences. GoUSA TV showcases the vast variety of USA experiences available to potential travelers, whether they are seeking road trips, the great outdoors, urban culture, culinary delights, hidden gems, or marquee attractions. GoUSA TV currently carries more than 120 hours of shows covering every state and territory in the USA, including 49 series and eight feature films. The GoUSA TV linear channel is available in Australia, Austria, Brazil, Canada, Denmark, Finland, France, Germany, India, Ireland, Italy, the Netherlands, Norway, Spain, Sweden, and the U.K.



GIANT-SCREEN FILMS

Brand USA's giant-screen projects have also proven successful over the years. Brand USA's first giant-screen film, *National Parks Adventure*, premiered in 2016 with regular distribution in more than 15 countries and was the highest grossing documentary film in 2016. In 2018, *America's Musical Journey*, which traces the roots of American music, opened in more than 75 theaters around the world, generating nearly two billion impressions across earned and paid media. Brand USA released its third film, *Into America's Wild (IAW)*, just as the pandemic began.

In late FY2022 and throughout FY2023, Brand USA will renew distribution of and in-market activations with *IAW*. The film itself is primarily a consumer promotional tool as the demographics for documentary-style giant-screen films align nicely with Brand USA's target demographics. However, in-market activations around the film are media and trade engagement tools that help galvanize tour operators and travel agents to expand their offerings with a broader set of destinations and deeper set of experiences. The giant-screen films have also been a key tool for Brand USA's work with U.S. embassies and consulates and Visit USA committees. In addition to collaborating on major activation events, Brand USA has supported dozens of screening events produced by these partners beyond the organization's target markets.



LOUISVILLE, KENTUCKY

DIGITAL AND SOCIAL

Brand USA operates 16 consumer websites in eight languages on VisitTheUSA.com. These websites generate large consumer global traffic from people searching for travel facts and interesting experiences in the USA. New content is added on a weekly basis. The self-directed trip planner covers over 4,000 cities, where users can customize their trip by date, events, and location. Once compiled, the trip can be shared with family and friends. VisitTheUSA.com is typically on the first two pages of Google when users search the term “USA.”

SOCIAL: In addition to running a global Facebook and Instagram account, Brand USA will manage market-specific social media pages for the following markets: Australia, Brazil, Canada, China, Colombia, France, Germany, India, Mexico, South Korea, and the U.K.

INFLUENCERS: Through its influencer marketing strategy, Brand USA will continue to leverage highly-qualified influencers to help increase intent to visit the USA from key international markets. Influencers are credible, third-party sources of inspiration and information to audiences in their home countries and around the world. Brand USA will execute multi-state, regional road trips with pre-vetted influencers to allow them to share their once-in-a-lifetime USA road trip with their followers back home.



COOPERATIVE MARKETING

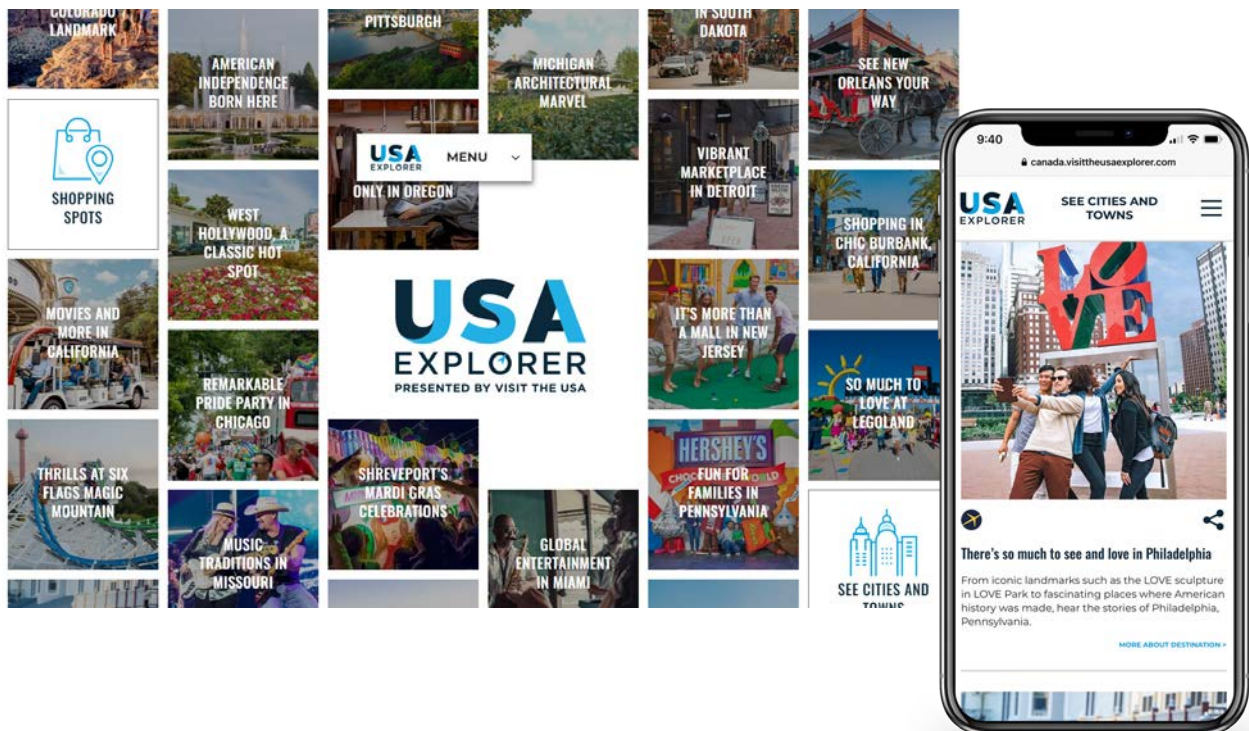
Cooperative marketing allows Brand USA to weave together the many stories and voices highlighting the diverse travel experiences throughout the United States in a cohesive and compelling way. Local partners have the best understanding of what makes their place unique, and Brand USA has the channels and platforms to deliver those messages directly to global consumers.

MULTI-CHANNEL PROGRAMS

Multi-channel programs are executed seasonally and designed to reach travelers with inspirational messaging, engaging content, and bookable product during peak travel planning periods across key markets.

As part of this program, in FY2022 Brand USA introduced a new digital platform: USA Explorer, an interactive travel guide. Digital travel guides are customized for each market based on interests and travel motivators, featuring unique USA travel experiences, from the most scenic views to the hottest shopping spots, from riding the rails in Colorado, to diving for your dinner in Florida. This new platform was designed to be mobile-first and is distributed through targeted digital media campaigns capturing a highly qualified audience of travel planners and travel intenders.

Campaigns include in-depth, partner specific key performance indicators (KPIs) and performance reporting, including reach, engagement, and attributable booking metrics. In FY2023 this program will be expanded to focus on a broader group of countries including Australia, Brazil, France, Germany, India, Mexico, South Korea, and the U.K..





GLOBAL INSPIRATION PROGRAM

The Global Inspiration Program incorporates storytelling across print and digital channels, featuring a wide range of destinations from across the 50 states, five territories, and Washington, D.C., that are integrated into regional itineraries, themed stories, and epic road trips designed to inspire travel and aid in trip planning. In FY2023 Brand USA plans to distribute 125,000 print guides and generate 30 million digital media impressions as part of this program. Targeted media campaigns in key markets drive audiences directly to partners' digital content and deliver valuable partner-specific engagement metrics.

CUSTOM PARTNER STRATEGIES AND REGIONAL FRAMEWORK

Brand USA has been building on a framework to help facilitate opportunities for partners to benefit partners working together to meet custom strategic needs across global travel trade, consumer advertising, and earned media tactics. We have extended this framework to leverage our resources to also provide opportunities designed for destinations working together on a regional basis. Among other custom cooperative strategies, in FY2023 Brand USA will be continuing execution of a comprehensive strategy promoting the commonwealth of Kentucky and the Kentucky Bourbon trail, as well as a unique content and distribution campaign to build upon the multi-year Civil Rights Trail strategy. Each of these custom plans are geared towards clearly defined KPIs and measurements of success.

5 experiencias de bienestar para comenzar el año en Estados Unidos

Encontrar un momento de profundo silencio o entregarse al placer de un masaje relajante es una buena propuesta para comenzar el año.



Foto: iStockphoto/Prokopy



Iniciar el 2022 rodeado de una **naturaleza exótica**, paisajes prístinos y el sonido que genera el silencio son parte de las **experiencias de bienestar** que aguardan a los viajeros en alguno de los **destinos wellness de Estados Unidos**.

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TRAVELWEEKLY

Kentucky and Brand USA to showcase home of bourbon



By Robin Searle | June 14, 2022, 08:26



Brand USA and Kentucky have teamed up for a two-year partnership to promote the state's bourbon whiskey heritage and increase international visitor numbers.

EARNED MEDIA

Earned media is a valuable and cost-effective tool to promote travel to the United States internationally. Coverage of a destination on news media channels or blogs, reviews and ratings on online platforms, and a traveler posting on their social media are some examples of successful earned media activities. Earned media is a vital complement to paid media strategies that enable Brand USA to shape the narrative when telling the stories of the USA, and it is beneficial to domestic stakeholders looking to grow their international presence.

Brand USA creates storytelling pillars to reflect the ever-changing travel landscape. These pillars provide the foundation for global press releases and pitches, feature ideas, and press trips to satisfy the global media's hunger for compelling travel stories. Brand USA develops the pillars by reviewing global trend reports and connecting with senior international editors and top freelancers to gain a comprehensive understanding of the current global media environment. This ensures global consistency of messaging with local nuances.

In FY2023, a series of global press releases and custom pitches, based on the storytelling pillars, will bring more media attention to lesser-known destinations. They will continue to highlight diverse communities, promote equity in accessing the benefits of international travel, and showcase travel opportunities for people of all interests and abilities. Brand USA will also create and update quarterly a global journalists' guide on key happenings in the "What to See and Do Across the USA" guide. Brand USA will organize three visiting media group trips per year to destinations throughout the country.

Another significant role Brand USA plays is to facilitate relationships between international journalists and local and regional destination marketing organizations. Brand USA's global presence and perspective allows it to match international journalists with the appropriate destination marketing organization to plan productive press trips, develop quotes for travel features, and cultivate story ideas. This important work will continue throughout FY2023 and feature all parts of the country, including rural and urban communities.



COMMUNICATING TRAVEL POLICY

Brand USA has a particular role to play, as outlined in the Travel Promotion Act, in providing accurate and timely information to travelers about U.S. visa and entry policy. In the wake of a global pandemic in which individual countries' policies have been a moving target, this sort of practical travel information is a critical component to rebuilding traveler confidence.

In FY2023, Brand USA will continue to provide helpful and concise travel policy information to potential travelers through a variety of channels that include digital, social, print, in-market trade events, Brand USA Global Marketplace, earned media, and more. Brand USA will also continue to work with key federal agencies to furnish timely, accurate, and user-friendly information that will help travelers know what to expect when they visit. Brand USA will also work with these agencies and others to market the welcome in key pinch points along the traveler journey, including consular waiting areas, official government websites, international airports, and more.



PUBLIC-PRIVATE PARTNERSHIP

Brand USA will have a critical role to play under the newly-launched [National Travel and Tourism Strategy](#) to promote the destination to global consumers, travel trade, and media. Brand USA will work with the interagency Tourism Policy Council to promote the breadth and diversity of the United States and its communities, and work to foster a sector that drives inclusive economic growth, creates good jobs, and buttresses the industry's long-term viability. Example activities might include working with U.S. embassies and consulates on in-market activities such as special film screenings, industry roundtables, PR events, trade engagements, and other promotional opportunities. As part of this collaboration, Brand USA will refresh its toolkit of promotional materials tailored to overseas Consular, Public Affairs, and Commercial sections. In addition, Brand USA and federal partners are likely to enhance ongoing collaboration to showcase the country's greatest national treasures. U.S. public lands and waters represent both a significant portion of the country and a nearly endless source of unique travel experiences and content. Finally, Brand USA will continue to bring industry stakeholders to the table at home and abroad to ensure the travel industry reaps the benefits of and fully participates in this whole-of-government initiative to harness the power of travel for the American economy.

TRAVEL TRADE ENGAGEMENT

The travel trade represents channels through which international consumers access and regularly rely on booking their trips or components of a trip. These channels range from brick-and-mortar retail travel agencies to tour operators to online travel agencies (OTAs), wholesalers, airlines, and more. Many inbound visitors from our overseas international markets rely on trusted third parties for long haul travel (travel from outside their immediate continental location) as the trade provides destination expertise, one-stop contact for all vacation needs, and added peace of mind for what is often a multiweek vacation. Even as they emerge from the pandemic, many markets continue to see elevated demand for travel booked via travel agents and third-party companies who offer additional reassurance to the traveling public and provide them with the confidence to book their holiday in the expectation that travel will be as stress-free as possible.

Brand USA's travel trade engagement strategies combine working with international teams in 10 market regions to ensure the global travel trade communities have the content, resources, and connections needed to drive and propel visitation to the USA. Effective tools to do this include: Brand USA's Travel Trade website; the USA Discovery Program (Brand USA's online travel agent training program); virtual educational webinars; and in-person agent trainings plus several product and itinerary development programs.

To revive and strengthen its physical presence in the core markets and also to broaden and deepen the USA product being sold in the overseas markets, Brand USA will employ a set of key tactics which include developing creative and integrated campaigns with top tour operators across B2B2C platforms. These campaigns reach a highly targeted international consumer through trade partners and also showcase new products and lesser-known destinations that capture the true diversity of the U.S. destination. In addition, Brand USA will work with industry partners to facilitate and coordinate product familiarization trips for product developers and business managers of the top tour operators and reintroduce MegaFam trips, which are agent educational trips organized in conjunction with U.S. destinations and airline partners.



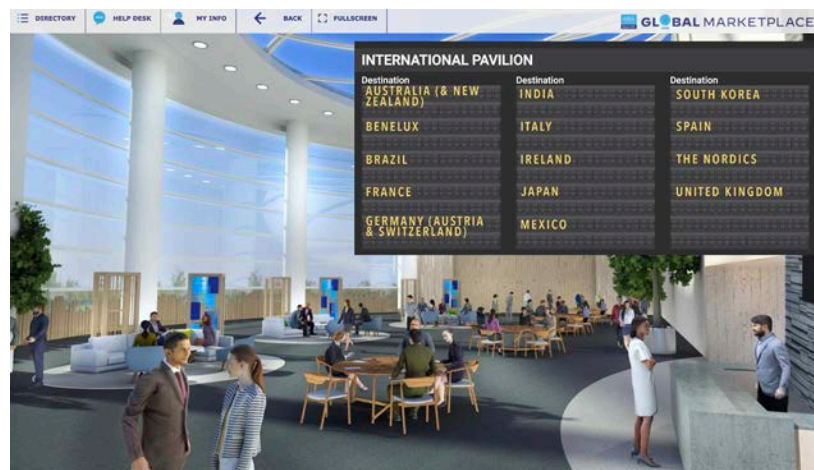
A key objective in Brand USA's trade strategy is to create opportunities for U.S. stakeholders to engage in international business-to-business (B2B) relationships and make informed decisions about their resource allocation for international promotion.

Brand USA Global Marketplace is a virtual platform designed to connect the U.S. travel and tourism industry with a global network of qualified travel trade and media. The primary purpose of the platform is to facilitate one-to-one business meetings between U.S. travel organizations and international travel trade and media. In FY2021, Brand USA deepened and expanded use of the platform, hosting a virtual version of Brand USA Travel Week Europe and more than 20 other events, which collectively facilitated over 5,000 business meetings and served more than 3,000 stakeholders in at least 29 countries. Brand USA Global Marketplace became a true central meeting point for supplier and buyer partners and will continue to be an important tool even as face-to-face meetings resume.



INTERNATIONAL PAVILION

The International Pavilion is a free resource designed to provide a comprehensive overview of key target international markets and ultimately help U.S. partners and stakeholders re-enter international markets with the tools they need. As travel recovery picks up pace, we want to give U.S. partners and stakeholders as much support as possible as they look to restart their international marketing efforts. Knowing marketing budgets are tight, or in some cases cut drastically, the International Pavilion offers foundational details on each key global market and helps partners make informed decisions and be connected directly with key players in the industry. By the end of FY2022, the following country lounges will launch on the platform: Australia/New Zealand, Benelux (Belgium, Luxembourg, the Netherlands), Brazil, Canada, China, France, Germany, India, Ireland, Italy, Japan, Mexico, Nordics (Denmark, Finland, Norway, Sweden), South Korea, Spain, and the U.K.





BRAND USA TRAVEL WEEK EUROPE

Launched in 2019, this Brand USA-hosted annual event that brings together U.S. destinations, attractions, and industry sectors to meet with the U.K. and European travel trade and media to build business connections, showcase new products and experiences, as well as share the latest stories with journalists. Hosted buyers and media are recruited from Austria, Belgium, France, Germany, Ireland, Italy, the Netherlands, Scandinavia (Denmark, Norway, and Sweden), Spain, Switzerland, the U.K., as well as other European countries. Brand USA Travel Week provides the opportunity to discuss trends, challenges, innovations, and opportunities to drive future visitation to the United States. The 2022 edition will feature two companion tracks: a media forum and a CEO summit. The media forum offers 15-minute meetings with consumer and trade media to share the latest destination stories and seed press trips. The CEO summit is an opportunity to learn best practices from peers, participate in exclusive sessions with industry leaders from aviation to media, host a 5-10 minute press briefing with the U.K. and European media and engage in press networking opportunities.

SALES MISSIONS/B2B MEETING EVENTS/ TRADE EVENTS



Brand USA coordinates and facilitates the business-to-business engagement of the U.S. tourism sector with key travel trade and media in a number of core markets (Australia, Canada, Europe, India, Mexico, New Zealand) by organizing multi-city sales missions that engage the top buyers in a B2B meeting marketplace. Other valuable events organized in-market include screenings of Brand USA giant screen movies which act as a catalyst for B2B2C engagement and inspire travel trade and consumers to visit the USA.

MEETINGS, INCENTIVES, CONFERENCES, AND EXHIBITIONS (M.I.C.E.) TRAVEL

In FY2023, Brand USA will begin to apply resources and attention to explore the M.I.C.E. market in an effort to develop an integrated strategy to support our partners' international needs in M.I.C.E. to drive incremental visitation to the USA. The first step will be to explore an IMEX strategy to elevate the USA presence and support, as well as provide additional value to existing exhibitors and find ways to lower barriers of entry to allow new exhibitors to participate.





ORGANIZATIONAL TRANSFORMATION

As society broadly transitions from the pandemic stage of COVID-19 to a long-term endemic stage, the travel and tourism industry is poised for a robust recovery. Travel organizations, especially destination marketing organizations, are in the process of rehiring staff, reengaging vendors, and mapping out new approaches to marketing and management. After more than two years of scaled back activities, there is now an opportunity to do more than simply build back to prepandemic approaches to workforce and resource allocation.

The human capital, systems, money, and other infrastructural pieces must all be in place for the organization to effectively pursue the strategies detailed in this section and the FY2023 goals contained in the next. It is important for Brand USA to be oriented in a manner that supports the organization's long-term, overarching objectives, the National Travel and Tourism Strategy targets, and the specific goals in FY2023 or any individual fiscal year. Over the coming months and years, Brand USA will undertake several areas of organizational transformation to ensure alignment between short- and long-term objectives on the one hand and annual budgets and strategies on the other. Some example areas are noted on the following pages.

WORKFORCE DEVELOPMENT

Brand USA is rebuilding its workforce and overall approach to human capital for the years ahead. After seeing staff headcount fall by more than half over the course of the pandemic, the organization is in the process of hiring at all levels and across all functions. This includes a reassessment of the organizational chart to find efficiencies and other benefits—for example, in handling media fulfillment regardless of whether the media is purchased by or contributed to Brand USA. The rebuilding of the workforce will culminate during FY2023.

At the same time, Brand USA is transitioning to a full-time hybrid office. While much of the staff lives and works in the Washington, D.C. region, where Brand USA headquarters will always be located, the new tools and norms developed across the economy during the pandemic will allow Brand USA to recruit the best candidate for each job opening regardless of where they reside. Brand USA leadership will ensure a steady cadence of calling the full team to the office throughout the year for larger planning and team building purposes. Since a large portion of the staff is frequently on domestic or international travel, the decline in time-in-office is less significant than it would otherwise be, and many teams will be together at various events throughout the year.

Finally, in FY2023 Brand USA will look to reconstitute its performance management system. This process will involve input and participation from all levels of the organization. The objective is to develop a new performance management system that provides useful and ongoing feedback rather than all at once at a single point or two on the calendar. It will also optimize for new aspects of today's workplace and seek to account more holistically for individual outcomes as well as the collective accomplishments of the entire organization.

EMPLOYEE ENGAGEMENT AND DIVERSITY, EQUITY, AND INCLUSION (DEI)

During FY2022 Brand USA engaged in strategic planning intended to address the mission, vision, and long-term principles for the organization. This work also addresses stakeholder and partner engagement, organizational health and culture, and other core elements of the culture. The resulting “2022-2025 Strategic Plan” is a roadmap for the organization that will also inform each year's business plan and budget. In FY2023, Brand USA will begin to operationalize this roadmap.

In addition, Brand USA is embarking on a comprehensive employee engagement program that includes management training, education, and strategic planning that is intended to underpin the organization's foundation. This work will have an explicit diversity lens and seek to incorporate DEI principals and best practices into ongoing management of the company, its workforce, and its products.

ENVIRONMENT, SOCIAL, AND CORPORATE GOVERNANCE (ESG) ANALYSIS

As much of the travel industry turns to charting a course for a more sustainable future, Brand USA will undertake an analysis of an appropriate role in the ESG space. In FY2023, Brand USA will continue exploring opportunities within legal and practical boundaries and develop recommendations for a potential ESG strategy. This could encompass anything from marketing and communications content to Corporate Social Responsibility (CSR) activities and even corporate policies related to travel and procurement.

This initiative will be informed by the best practices in the U.S. and global travel and tourism space, including from the public and private sectors, as well as think tanks and academia. Consumer preferences are already pushing destinations in this direction, and Brand USA can help stakeholders develop their own approaches from a marketing and communication perspective, as well as in the board room.

NEW MARKET DEVELOPMENT

The top 10 source markets for international travel to the United States have long supplied more than 76% of all inbound visitors to the United States. Brand USA is uniquely positioned to realize marginal gains in markets beyond the top traditional suppliers of travelers and establish a presence or infrastructure that allows industry stakeholders to engage new markets beyond their areas of focus. Over the coming years, Brand USA will look to develop new markets as an important aspect of eclipsing pre-pandemic levels of arrivals and spending, and of adding and creating value for partners.

Some of this work was already underway prior to FY2023. For example, the “One Europe” strategy and programs like Brand USA Travel Week U.K. & Europe already connect U.S. destinations and companies with the travel trade and media from nearly two dozen European markets, only a handful of which have any sustained destination marketing presence from the United States. There is further potential to develop high-upside but low achieving markets where, for example, there is good air connectivity but little to no active engagement from U.S. destinations (e.g., Poland, Portugal, Nordics).

Beyond Europe, Brand USA will begin to develop stretch markets that are not in the top 10 source markets, but either individually or regionally present good potential for the U.S. travel and tourism industry. The specific target markets and channels will vary by year.

For example, in FY2023, Brand USA will pursue regional trade activities in South America beyond Brazil (Argentina, Colombia, Chile). In future years, potential regions for consideration include Southeast Asia, the Middle East and North Africa, and Sub-Saharan Africa. Already Brand USA supports consumer or trade engagements in some of these markets through partnerships with U.S. embassies and consulates, as well as Visit USA committees.





FY2023 OBJECTIVES

OBJECTIVES

FY2023 will be the first full year of recovery in the global visitor economy, and all manner of country will compete to regain lost visitors and revenues and to set their travel industries on long-term sustainable footing. Within the bounds of the fiscal year, Brand USA will seek to achieve positive returns for the overall U.S. economy and for all sorts of communities that rely on or may benefit from visitor spending and connectivity with the world for their economic vitality. At the same time, it will also be a critical year for setting the longer-term trajectory, and Brand USA will lay the ground work for the ongoing, sustainable recovery that must follow the initial rush of pent-up demand.

Brand USA's role is to remind the people of the world why they love the USA and to keep the country in the consumer evaluative set in a way no individual destination can do on its own. This positioning is the best way for Brand USA to add and create value for the U.S. economy and the travel industry — filling a role that only the nation's destination marketing organization can do to set the table for stakeholders throughout the industry to capitalize and benefit from increased international visitation.

The topline, qualitative aims and the initiative-specific performance indicators contained in Brand USA's FY2023 objectives seek set the trajectory of the recovery in the short-term and support the goals of the new National Travel and Tourism Strategy in the long-term.

Objective 1: Reach the right people, with the right message, via the right channels

Influencers

- Host 60+ international influencers on bookable itineraries that feature all 50 states, five territories, and the District of Columbia

Social and digital

- Manage a global social presence and market-specific social media pages with at least 1,200 pieces of hyper-local and relevant content for these 11 markets: Australia, Brazil, Canada, China, Colombia, France, Germany, India, Mexico, South Korea, and the U.K.

GoUSA TV

- Add GoUSA TV to a minimum of five new platforms and at least five additional countries

Multi-Channel Program

- Expand mobile-first, digital campaigns to a broader set of markets: Australia, Brazil, France, Germany, India, Mexico, South Korea, and the U.K.
- Optimize multi-channel content and distribution tactics with associated partner-specific performance reporting (reach, engagements, attributable bookings)

Objective 2:

Welcome the world back and make the USA top of mind for consumers looking to travel

Influencers

- Increase influencer impressions and reach by 100% year-over-year

Social and digital

- Increased social and digital followings by 10%
- Increase social and digital engagements by 200%
- Increase brand awareness and consideration as measured by brand lift studies comparing exposed and control groups

GoUSA TV

- Produce seven new original series and license 30 additional hours of programming
- Increase overall audience size by 50% and grow time spent watching by 120%

Into America's Wild

- Execute at least 20 in-market activation events

Global Inspiration Program

- Distribute 125,000 print guides and generate 30 million digital impressions
- Deliver valuable partner-specific engagement metrics

Earned media

- Use global press releases and bespoke pitches to spotlight lesser-known destinations and DEI initiatives
- Facilitate individual and group press trips for U.S. destinations
- Organize three Brand USA group press trips
- Maintain a quarterly global journalists' guide to key events in the USA

Objective 3:

Drive consumers down the marketing funnel from the inspiration phase to bookings in concert with key partners in market

Social and digital

- Provide 500+ digital assets from the United Stories campaign in a toolkit for travel trade partners to promote and sell U.S. destinations and itineraries



APOSTLE ISLANDS NATIONAL LAKESHORE,
WISCONSIN

- Launch fully-integrated, creative campaigns using multiple mediums and showcasing a wide variety of products with at least 50 global tour operators

Product development

- Create at least four new regional, multi-state itineraries to be showcased to consumers via U.S. receptive tour operators and their clients
- Promote 35+ self-drive, multi-state itineraries via influencer programs, travel trade media campaigns, tour operator coop campaigns, travel agent trainings, and earned media

Objective 4:

Strengthen B-to-B relationships, create opportunities for U.S. stakeholders, and ensure each market has the content, resources, and partnerships needed to drive travel

Sales missions and B2B events

- Build and facilitate business connections between U.S. partners and key industry members by coordinating events in the following markets: Australia, Canada, India, Japan, Mexico, New Zealand, South America (Argentina, Brazil, Chile, Colombia), and South Korea

Megafams/product fams

- Host three MegaFams from 12 markets, visiting 40+ destinations and partnering with multiple airlines to expand the knowledge base of front-line travel trade
- Host at least four product fams from at least four markets, visiting 20+ destinations and partnering with multiple airlines to introduce new U.S. programs

Brand USA Global Marketplace

- Grow exhibitor presence within the USA Partner Pavilions, adding new pods on a rolling basis
- Facilitate virtual business meetings between U.S. partners and top travel buyers from the U.K., Europe, and Asia-Pacific region
- Maintain information housed on and increased partner utilization of the International Pavilion on Brand USA Global Marketplace
- Create an International Marketing 101 hub for first-time international marketers

Brand USA Travel Week

- Plan for Brand USA Travel Week U.K. and Europe 2023, which will take place October 16-19, 2023
- Explore creative ways to increase capacity for exhibitors and/or new opportunities for exhibitors to engage with U.K. and European trade
- Explore feasibility of a Travel Week Americas to bring together U.S. partners and top regional buyers and media from across Mexico and Central and South America

Objective 5:

Support the National Travel and Tourism Strategy

- Support federal initiatives to execute the new National Travel and Tourism Strategy and catalogue pertinent efforts with the Tourism Policy Council
- Ensure consumer campaigns and initiatives support the National Travel and Tourism Strategy approach to promote the United States as a premier destination grounded in the breadth and diversity of its communities
- Align relevant initiatives, especially those targeting beyond-the-gateway destinations and new tourism product contribute to the National Travel and Tourism Strategy approach to ensure diverse, inclusive, and accessible tourism experiences by supporting the development of diverse tourism products that benefit under-served communities and populations

Objective 6:

Maintain the highest level of corporate and financial governance

- Achieve an unqualified audit with no management letter
- Unlock \$100 million in federal matching funds by collecting at least \$50 million in cash contributions and the balance in in-kind contributions
- Manage overhead costs to no more than 10% of the total expenditure budget
- Achieve 100% compliance with the Travel Promotion Act, as amended, and corporate bylaws
- Explore an enterprise-wide ESG initiative for FY2023 and beyond

FY2023 SUMMARY BUDGET

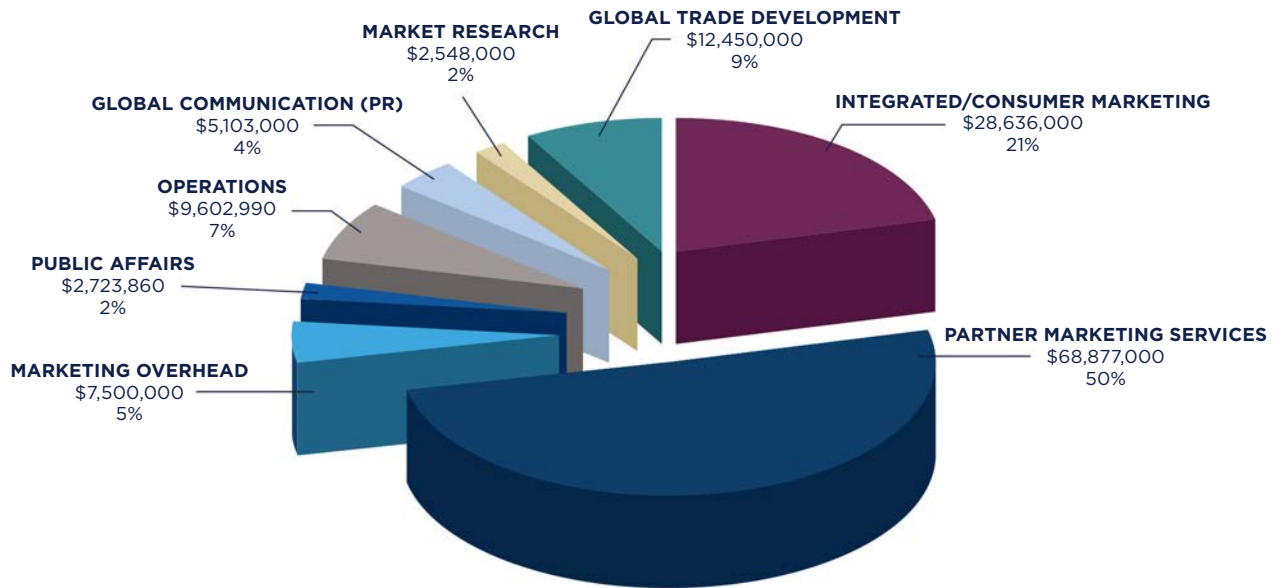


SUMMARY BUDGET

BASE BUDGET

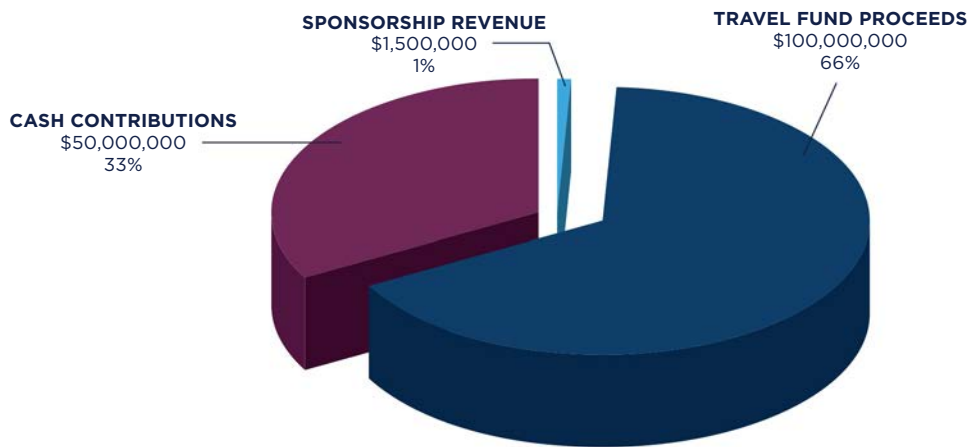
FY2023 EXPENSE BUDGET

\$137,440,850



FY2023 REVENUE BUDGET

\$151,500,000

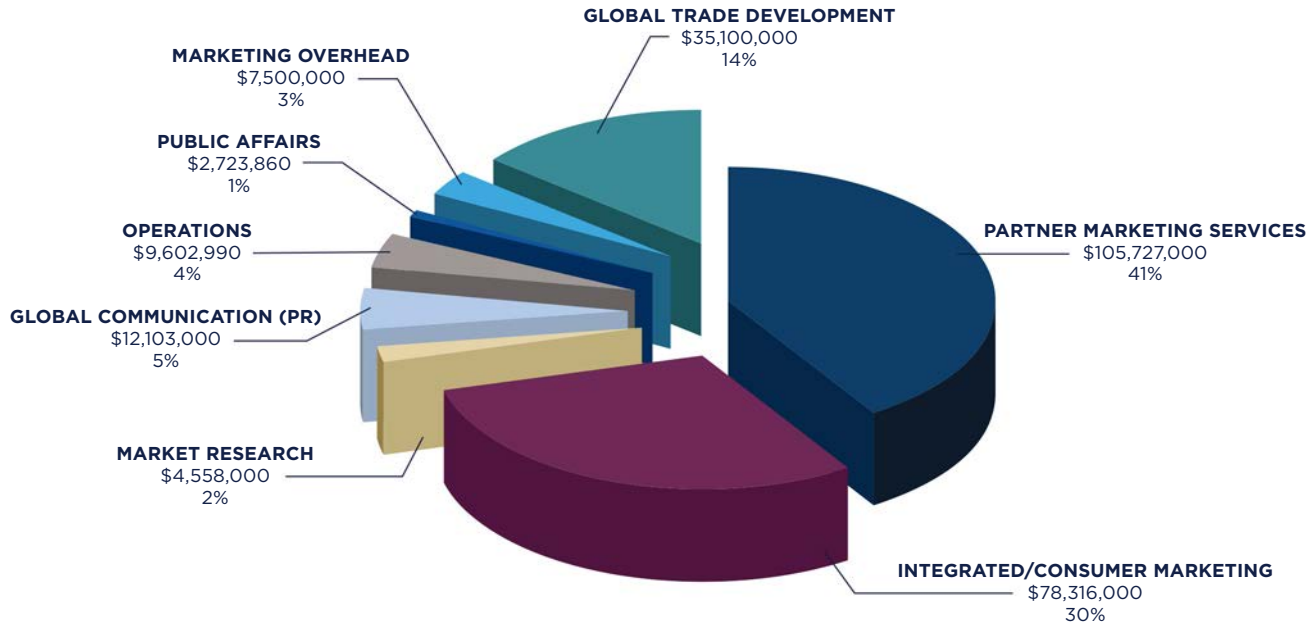


SUMMARY BUDGET

WITH FEDERAL RELIEF

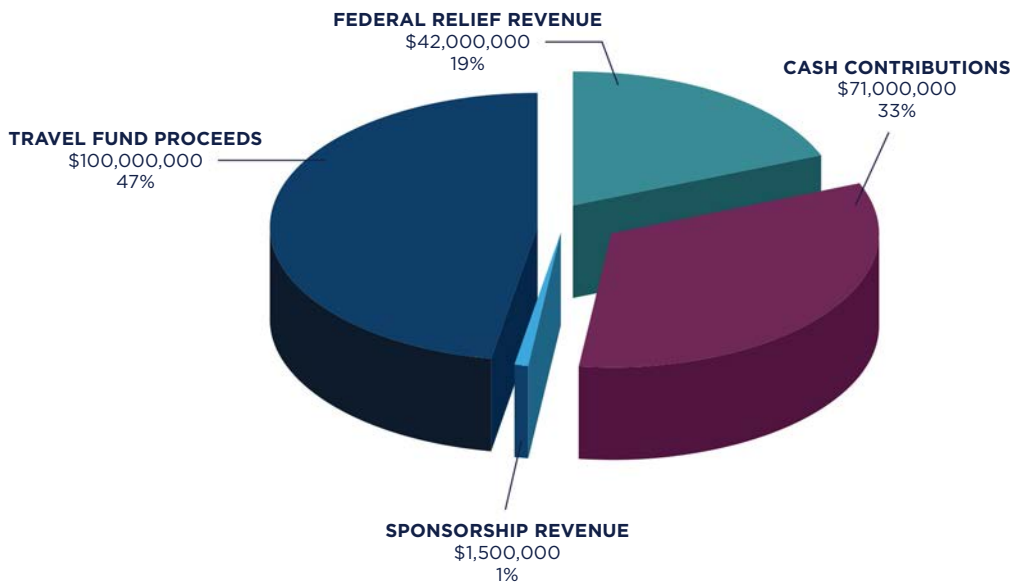
FY2023 EXPENSE BUDGET

\$255,630,850



FY2023 REVENUE BUDGET

\$214,500,000



BUDGET ITEMS OVER \$450,000

VENDOR: ACCOUNT NAME	DESCRIPTION	BOTTOM RANGE	TOP RANGE
Alchemia	In-Market Mexican Trade Representation and Event Management	\$750,000.00	\$1,000,000.00
Aviareps	In-Market Brazilian and Japanese Trade Representation and Event Management	\$1,000,000.00	\$1,600,000.00
Beautiful Destinations Limited	Photo and Video Content Creation and Digital Distribution	\$1,000,000.00	\$2,000,000.00
Edelman Miami	Global Corporate and Consumer Public Relations	\$3,000,000.00	\$4,200,000.00
Engine International	Global Survey and Research Vendor	\$750,000.00	\$1,250,000.00
Farragut Center c/o Borger Management	Office Lease	\$1,200,000.00	
Gate 7 Pty Ltd	In-Market Australian Trade Representation and Event Management	\$700,000.00	\$1,000,000.00
Hills Balfour Limited	European Trade Representation and Event Management	\$2,000,000.00	\$3,000,000.00
Hylink USA	In-Market Chinese Trade Representation, Social Media Community Management, Digital Development, and Media Planning and Buying	\$750,000.00	\$1,500,000.00
Mediacom	Global Media Planning and Buying Services	\$750,000.00	\$1,250,000.00
Miles Partnership LLP	Partner Engagement Program Support and Development and Distribution of Brand USA's Inspiration Guide	\$2,000,000.00	\$4,000,000.00
Sartha Marketing	In-Market India Trade Representation and Event Management	\$500,000.00	\$1,000,000.00
SDL International America, Inc	Translation Services	\$500,000.00	\$750,000.00
U.S. Travel Association	IPW and ESTO Presenting Sponsor Agreement	\$1,750,000.00	
Ykone	Global Influencer Management	\$1,000,000.00	\$2,000,000.00

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.

A person in a red jacket is climbing a tall, jagged rock formation. The rock is the central focus, with a person climbing on its left side. The background shows a dense forest of green trees and a blue sky with some clouds. The overall scene is a dramatic landscape.

BRAND USA LEADERSHIP AND BOARD OF DIRECTORS

SENECA ROCKS, WEST VIRGINIA

BRAND USA LEADERSHIP



CHRISTOPHER L. THOMPSON

PRESIDENT AND CHIEF
EXECUTIVE OFFICER



THOMAS GARZILLI

CHIEF MARKETING OFFICER



DONALD F. RICHARDSON

CHIEF FINANCIAL OFFICER AND CHIEF
DIVERSITY AND INCLUSION OFFICER



AARON WODIN-SCHWARTZ

SENIOR VICE PRESIDENT,
PUBLIC AFFAIRS



CASSADY BAILEY

VICE PRESIDENT, PARTNER
ENGAGEMENT AND MARKETING



JAKE CONTE

VICE PRESIDENT, GENERAL COUNSEL



JACKIE ENNIS

VICE PRESIDENT,
GLOBAL MARKETS



JESSIE NEWCOMB, CPA

VICE PRESIDENT,
FINANCE AND ACCOUNTING



MARK LAPIDUS

VICE PRESIDENT,
PRODUCT AND TECHNOLOGY

BOARD OF DIRECTORS

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

As required by the Travel Promotion Act, as amended, 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; small business or retail; travel distribution services; attractions or recreation; state tourism offices; city convention and visitors bureaus; commercial or private passenger air; land or sea passenger transportation; and immigration policy and law. 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.

The Governance and Nominating Committee makes recommendations to the board for committee member appointments and selection of the board leadership, including the chair, vice chair(s), secretary, and treasurer.



ALICE NORSWORTHY

CHAIR,
PRESIDENT OF GLOBAL
MARKETING, UNIVERSAL
PARKS AND RESORTS



TODD DAVIDSON

VICE CHAIR,
CHIEF EXECUTIVE OFFICER,
TRAVEL OREGON



MARK HOPLAMAZIAN

TREASURER,
PRESIDENT AND CHIEF
EXECUTIVE OFFICER,
HYATT HOTELS CORPORATION



ELLIOTT FERGUSON

SECRETARY,
PRESIDENT AND
CHIEF EXECUTIVE OFFICER,
DESTINATION D.C.



LAUREN BAILEY

CHIEF EXECUTIVE OFFICER
AND CO-FOUNDER,
UPWARD PROJECTS



KRISTEN ESPOSITO

PRINCIPAL,
ESPOSITO GLOBAL PARTNERS



NOEL IRWIN HENTSCHEL

CHAIRMAN AND
CHIEF EXECUTIVE OFFICER, AMERICAN-
TOURS INTERNATIONAL, LLC



DEAN KANTARAS

OWNER AND MANAGING ATTORNEY,
K. DEAN KANTARAS, P.A.



DONALD MOORE

SENIOR VICE PRESIDENT,
BUSINESS RENTAL SALES AND
GLOBAL CORPORATE ACCOUNTS,
ENTERPRISE HOLDINGS INC.



KEIKO MATSUDO ORRALL

EXECUTIVE DIRECTOR,
MASSACHUSETTS OFFICE
OF TRAVEL AND TOURISM



TOM O'TOOLE

SENIOR FELLOW AND CLINICAL
PROFESSOR OF MARKETING,
KELLOGG SCHOOL OF MANAGEMENT
AT NORTHWESTERN UNIVERSITY











BRAND USA

CONNECT WITH US

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
-  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
 -  Facebook.com/VisitTheUSA
 -  YouTube.com/VisitTheUSA
 -  [@VisitTheUSA](https://Instagram.com/VisitTheUSA)
 -  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.



ROYAL GORGE BRIDGE & PARK, COLORADO



JULY **2022**

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