

# RESTORING BRAND USA ACT FUNDING PLAN

MAY 2022



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Brand USA

RUBY LAKE, ELKO,  
NEVADA



VisitTheUSA.com

Dennis Isip

SPOKANE, WASHINGTON STATE

**Brand USA**

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# ABOUT BRAND USA

**Brand USA is the destination marketing organization for the United States. Established by the Travel Promotion Act in 2010 to promote the country as the premier international travel destination and communicate travel policies, Brand USA believes welcoming the world to the USA enriches lives and benefits communities. The organization's mission is to contribute to community prosperity throughout the country by marketing the welcome, driving international visitation, and clearly communicating U.S. travel policy.**

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:

- **7.7 million** incremental international visitors to the USA who spent
- Nearly **\$25.5 billion** on travel and fare receipts with U.S. carriers, and generated
- **\$3.9 billion** in federal, state, and local taxes, which delivered
- **\$55.8 billion** in total economic impact, and has supported, on average
- **More than 40,000** incremental jobs each year
- The nine-year results equate to an average marketing **ROI of 25:1** and an overall **ROI of 22:1**

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

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 traveling under the Visa Waiver Program.

Visit [TheBrandUSA.com](https://TheBrandUSA.com) for industry and partner information.

Visit [VisitTheUSA.com](https://VisitTheUSA.com) for exceptional and unexpected travel experiences in the United States.

GRAND MARAIS,  
MINNESOTA



# ABOUT THIS REPORT

H.R. 2471, the “Consolidated Appropriations Act, 2022,” provides funding for the federal government through September 30, 2022, including the “Restoring Brand USA Act.” The law makes available \$250 million in extraordinary funding to buttress Brand USA’s finances and help rebuild international visitor spending in states, cities, and towns throughout the country. The legislation does not affect Brand USA’s underlying mission and funding model.

The supplemental funding is derived from the same portion of the 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 is to be made available by the Secretary of the Treasury not later than 30 days after enactment of the Act.

The law mandates Brand USA to submit to Congress a plan for obligating and expending the funds not later than 60 days after the date of enactment. This document constitutes Brand USA’s fulfillment of this statutory requirement.

Congress and the public can expect further updates through the regular mechanisms Congress enacted for Brand USA reporting. These mechanisms include the annual business plan, marketing objectives, and budget submitted to the U.S. Departments of Commerce, Homeland Security, and State each August 1 and published around the beginning of each fiscal year. Brand USA also transmits an annual report to Congress each May 15 that covers activities from the prior fiscal year, including performance against established objectives and attributable impact on international arrivals and spending. Finally, Brand USA’s public board meetings take place throughout the year and are published well in advance.



JACKSON, MISSISSIPPI

# SITUATIONAL OVERVIEW



TAMPA, FLORIDA

# SITUATIONAL OVERVIEW

The pandemic has had a devastating effect on travel and tourism in general and especially on those communities, businesses, and individuals that rely on international visitor spending. Data released in March 2022 by the U.S. Department of Commerce demonstrate just how dramatic this impact was felt in the United States. The data show that total economic output generated by travel and tourism in 2020 decreased by more than 50% year-over-year. More stunning still is the outsized role of the sector to the overall economy—the decline in travel and tourism output accounted for more than half of the overall decline in U.S. GDP (56%) and more than a third of total employment decline (34.2%) in 2020.

These data are yet another stark reminder of the important role the travel sector plays in the vitality of economies at the local, state, and national levels. The international segment is particularly valuable because on average international visitors spend more time and money, and visit more places, than domestic travelers. U.S. travel and tourism exports were \$233.5 billion in 2019, accounting for 9% of all U.S. exports and 27% of services exports and furnishing a \$51 billion trade surplus.

Brand USA is funded by contributions from non-federal sources, such as state tourism offices and travel brands, and matching funds from ESTA fees paid by Visa Waiver Program travelers during the prior fiscal year. The organization receives a dollar in matching funds—up to \$100 million per year—for each dollar of contributed cash or in-kind that clears the verification process at the Commerce Department.

The pandemic challenged this model in significant ways that will continue to affect operations at least until FY2024. ESTA fee collections plummeted and remain low. In fact, fiscal years 2021 and 2022 were the first in which less than the \$100 million ceiling was available—\$62 million in FY2021 and \$13 million in FY2022. ESTA collections during FY2022, which comprise the available matching funds for FY2023, are difficult to estimate, but projections generally range from around \$50 million to \$80 million. In other words, the available matching funds over the three-year period will be about \$125 million-\$150 million below the amount authorized by Congress in the Travel Promotion Act. In addition, Brand USA's partner base and the travel industry more broadly continue to face significant hurdles to making contributions at pre-COVID levels. These hurdles are felt among destination marketing organizations as well as private sector and corporate partners.

In 2021, according to the Department of Commerce, the United States welcomed 22.1 million visitors, reflecting a 15% increase over 2020. Forecasts from Tourism Economics do not expect international arrivals to the United States to reach 2019 levels again before 2024.

Although world travel is still far from pre-pandemic levels and much uncertainty remains, the USA remains top of mind among international travelers. With the reopening of U.S. borders to the world of vaccinated travelers in November 2021, Brand USA research has revealed that travelers are adjusting to the situation and have taken steps to restart travel with precautions rather than postponing or canceling trips. Survey respondents express a higher desire to travel as the number of COVID-19 cases decline, vaccinations increase, and travel restrictions are eased. Finally, Brand USA tracks aggregate search data for terms like “flight” as well as actual planned seat capacity from airlines, all of which track with the overall trajectory of the recovery and consumer sentiment.

The supplemental funding provided by the “Restoring Brand USA Act” is an investment to rebuild the international traveler economy. As more of the world opens up and air routes come back online, this dedicated funding will help the United States attract its fair share of the competitive global travel market. This will translate directly into economic growth, quality jobs, and tax revenues in communities throughout the nation. It will help hasten the return to pre-pandemic levels of visitation and spending.

At the same time, these resources will allow Brand USA to continue its work to position the country competitively and inspire global travelers to visit the USA. It is important for business continuity and the long-term success of marketing efforts to use the resources in ways that are both robust and sustainable over the long term. The funding is a bridge back to the normal operations—allowing the organization to return to full capacity even as the funding model will likely not be at full strength until FY2024. In the meantime, Brand USA will continue to work with industry and government partners to maximize access to available federal matching funds as established by the Travel Promotion Act.



# EVOLUTION OF BRAND USA

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.

In the spring of 2012, Brand USA unveiled the United States' first-ever comprehensive destination marketing effort, called "Land of Dreams." The much-acclaimed campaign featured an original song and performance by Rosanne Cash. The consumer campaign launched in Brazil, Canada, Japan, South Korea, and the United Kingdom. Prior to the campaign launch, Brand USA contracted with international representation to coordinate with the in-market travel trade and media in Austria, Germany, Ireland, Switzerland, and the United Kingdom. The organization focused on value-driven partnerships and engagement opportunities for partners large and small, rural and urban, and beyond. This early global footprint created an initial infrastructure to bring together the overlapping interests of the global trade community and U.S.-based travel and tourism entities. Together with an inspirational approach to driving travel, Brand USA developed its first generation of partner programs and initiatives.



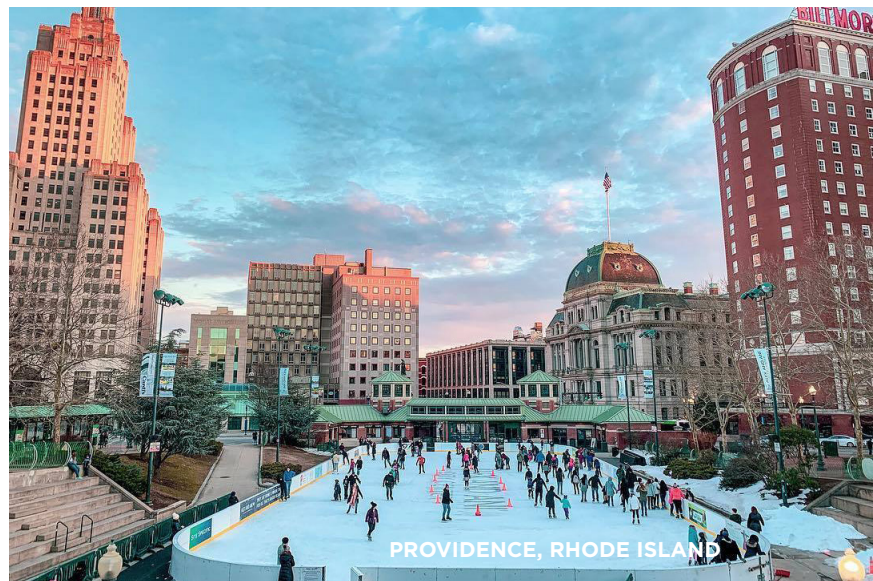


As consumers' media habits shifted from traditional channels to more individualized experiences, the "one size fits all" model became less effective and marketers turned increasingly to digital platforms in place of relatively outmoded methods of communication. Recognizing that the consumer path to purchase 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 while on each of a series of delivery platforms—phones, tablets, laptops, billboards, and IMAX screens. The current iteration of this strategy is the award-winning United Stories campaign, which captures warm and welcoming stories told from local perspectives and global influencers and invites travelers to experience and share their own USA travel stories.

These consumer trends only accelerated over time. Consumers and device makers around the world increasingly adopted video streaming services in place of in-line broadcast programming. In 2018 Brand USA launched GoUSA TV, making it the first national destination marketing organization to launch a proprietary connected TV channel. GoUSA TV proved particularly valuable during the pandemic when streaming video channels saw unparalleled growth as consumers turned to digital and video content to dream about travel. The channel has enjoyed robust viewership growth through distribution partnerships with Samsung Plus TV, Reach Network, Wovenmedia, GO Transit and others. GoUSA TV has also been among the channels Brand USA has used to introduce its multicultural strategy to showcase and amplify a broader spectrum of communities and cultural heritage journeys across the USA, including Black- and Brown-owned travel businesses.

In addition, Brand USA has pursued continuous refinement in the way it jointly markets with industry stakeholders. Cooperative marketing allows Brand USA to leverage the local expertise of partners at the state, local, and firm levels while weaving together the many stories of the USA travel experience in a cohesive and compelling way. These efforts have ranged from groundbreaking campaigns in conjunction with industry titans like Expedia, Google and the Travel Channel to content partnerships with strategic media brands like the BBC, WeChat, and Euronews. Over time, Brand USA has increased the reach, efficiency, and accessibility of these programs, allowing a greater number of U.S. destinations to participate and enhancing Brand USA's diverse storytelling offerings to consumers and the travel trade.



With the onset of COVID-19, the U.S. travel and tourism industry desperately needed to stay connected with the global network of travel trade and media. In a business that often runs on relationships, Brand USA had an additional interest in finding a solution that would competitively position the United States for a rapid and robust recovery when the time was right. Brand USA Global Marketplace is a virtual platform designed to connect the U.S. travel and tourism industry with a global network of qualified tour operators, travel agents, airlines, 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. Since its launch in September 2020, the platform has hosted more than 30 events, facilitated over 8,000 one-to-one business meetings, hosted more than 3,000 event attendees, and served partners in some 30 countries. These events ranged from B2B meetings to educational sessions to partner-hosted events. Brand USA Global Marketplace became a true central meeting point for supplier and buyer partners alike and will continue to be an important tool even as face-to-face meetings resume.

To engage the travel trade and media, which in any given market are key intermediaries to consumers, Brand USA continued to build out its global representation network. This footprint ultimately reached offices in 18 countries with coverage of more than 20 markets. International offices are responsible for everything from educating the travel trade about expanded product offerings to devising cooperative marketing efforts to helping partners tell their stories in market and working with U.S. embassies and consulates on promotional opportunities. Two innovations in particular stand out among the many developments over the past decade. First, Brand USA devised a new “MegaFam” program, which works with airlines and travel agents to host simultaneous, multi-itinerary familiarization tours of as many as 100+ travel agents from a given market. This program is an ideal way to expose travel sellers from abroad directly to new travel product and contacts in and beyond U.S. gateways. Second, Brand USA Travel Week Europe debuted in 2019 and provided a game-changing business platform for U.S. suppliers to engage with key buyers from the UK and Europe. This week-long event is a far more efficient and effective way to engage the travel trade than the crowded and expensive traditional trade shows such as ITB and WTM.

Finally, Brand USA’s role as a public-private partnership has evolved over the past 10 years. The first National Travel and Tourism Strategy in 2012 opened up tremendous possibilities for Brand USA to collaborate with a variety of federal government partners to inspire travel to the USA, communicate U.S. visa and entry policies, market the welcome, promote public lands and waters, and more. Over the past decade, Brand USA has established a collaborative relationship across the federal agencies that have borne fruit in the form of welcoming signage at U.S. ports of entry and consular waiting areas, joint presence at trade shows and events, promotional toolkits for U.S. embassies and consulates, immersive promotion of national treasures, collaboration on bilateral tourism initiatives and high-level economic dialogues, and more.

These relationships and history of productive collaboration position Brand USA and the federal government for the launch of a new National Travel and Tourism strategy that will help guide interagency and public-private collaboration on travel in the months and years ahead.

# PLAN FOR USE OF THE FUNDS



DEADWOOD,  
NORTH DAKOTA

# OVERVIEW

Brand USA will make judicious use of the funds allocated by the “Restoring Brand USA Act” for two primary purposes. The first is to execute a robust recovery campaign during the remainder of FY2022 and into FY2023 that will hasten the return of the high-value international segment of the U.S. visitor economy. The second is to provide the organization a bridge back to normal operations even though the effects of the pandemic on the underlying funding model will likely continue to be felt into FY2024. Together, these two purposes will place Brand USA back on sustainable financial footing, drive economic vitality in communities around the country, and facilitate the industry’s long-term reentry into key global markets.

Brand USA expects to utilize the funds over three fiscal years, with the majority allocated in the remainder of FY2022 and through FY2023. Congress and the public can expect further and detailed updates to resource allocations through the regular mechanisms established by the Travel Promotion Act—Brand USA’s annual business plan, annual report to Congress, and open board meetings.

Market conditions will continue to play a pivotal role in Brand USA’s selection of markets and campaign strategies in any given year. It is important to allocate resources where they will generate healthy returns for the U.S. economy and to be agile to respond to opportunities and risks in real time. These choices will build on the lessons learned over the past decade of evolution.



FAIRBANKS, ALASKA

# MARKET SELECTION AND ALLOCATION

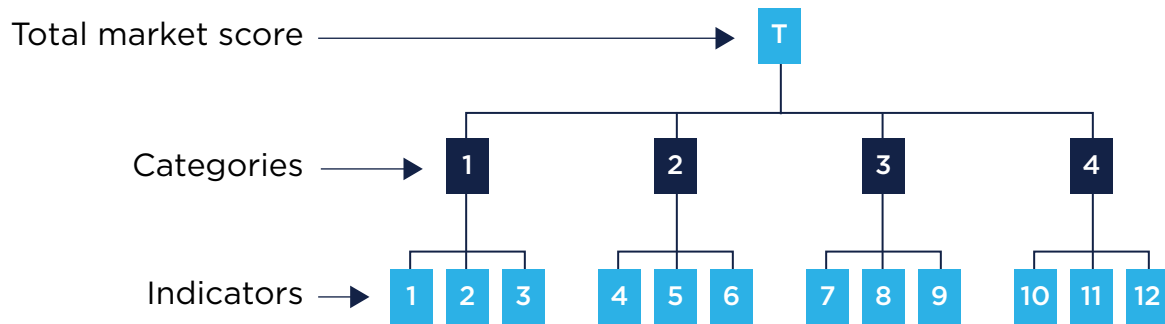
As the world begins to emerge from the pandemic, Brand USA will pioneer a market scoring system based on standardized measures of opportunity across all major current Brand USA markets and potential future markets. The new scorecard will also factor in a series of analyses to determine market potential in relationship to costs and risks.

The scorecard will include approximately 30 indicators (see example table below) distributed across key categories such as travel market size, spending power, growth prospects, ROI, and potential responsiveness of each market. These categories will be aggregated to a total market score. More important indicators (such as inbound arrivals) will receive higher weighting in the framework to ensure the funds entrusted to Brand USA are put to their best use. The scorecard will cover up to 30 international markets and will be updatable with new data as global and market conditions evolve.

Component	Indicators
<b>Market size</b> Quantifies the travel market opportunity	Leisure outbound spending (\$bn) Comparable trips, measured as long haul ('000s) Comparable destinations, measured as trips to region
<b>Country size</b> Quantifies the overall economic opportunity	Employment adjusted to percentage able to travel GDP per capita
<b>Growth</b> Indexes growth prospects for each market	Leisure outbound spending (% growth forecast) Comparable trips (% growth forecast) Employment (% growth forecast) GDP per capita (% growth forecast)
<b>Headroom</b> Determines the untapped opportunity	Destination share of regional nights Destination share of comparable trips Destination share of comparable destinations
<b>Sentiment</b> Assesses the general sentiment travel to destination	Confidence in own economy based on Pew Survey Cultural ties defined by origin country percentage of population Intent to travel to destination in next 3 years
<b>Alignment</b> Determines the match of a market's destination preferences	Competitor destination share of market outbound travel (Competitive set: TBO) Destination's share or a market's outbound travel
<b>Purchasing Power</b> Measures the relative strength of a market's currency as a proxy for value attractiveness of destination	Exchange rate forecast 3 years ahead Exchange rate, 3-year % charge Exchange rate purchasing power strength
<b>Visitor Value</b> Identifies the yield potential of visitors by market	Average expenditure per day (in destination) Average expenditure per trip (all outbound)
<b>Affordability</b> Determines the relative cost of a campaign in market	Real purchase power parity GDP per capita (proxy) World Bank Ease of Doing Business ranking (proxy)
<b>Presence</b> Marketing campaigns can leverage existing infrastructure of tourism office	Presence of overseas office in a market country
<b>Risks</b> Determines short and long term risks of a market. Short term risk is market by loyalty. Long term risk is market by fundamental social, political, or economic a higher score for lower risk	GDP residence measured by volatility index Composite intrinsic risk measured by Moody's risk formula Market Residence measured by volatility of outbound travel GDP residence in recessions Market has sentience recessions
<b>Accessibility</b> Measures the access of traveling to destination	Number of direct nights per day Visa requirements Distance from destination (measured from market's major airport)  Border state

The underlying data and analysis will be built into an online data intelligence platform. The total market score, as well as category scores and indicator data, will be transparent and accessible, allowing for simple cross-market comparisons. This platform will ease the transition from simple market intelligence to integrated marketing strategy for Brand USA and industry stakeholders.

Example market scorecard framework



Finally, Brand USA has a responsibility to promote the entirety of the United States, both urban and rural, well-known and less-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 UK might be mature for major gateway cities like New York and Miami while still representing 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.



# HOW BRAND USA WILL MARKET THE USA

Brand USA will deploy a number of market-driven strategies to increase inbound visitor travel to the United States and drive tourism dollars to communities in all 50 states, the five territories, and the District of Columbia. These include consumer campaigns, cooperative marketing, travel trade engagement, public relations, and public-private initiatives. Brand USA’s annual business plans and annual reports to Congress contain further detail on programs, results, and other information in any given year.

## CONSUMER MARKETING

Brand USA’s consumer marketing tactics—broadcast, print, digital, out-of-home advertising, social, and various multi-media strategies—are fundamental to Brand USA’s ability to reach, engage, and inspire travelers to visit the USA. The media mix is tailored to consumption habits and efficiencies within markets. Brand USA consults with media buying experts and conducts research to identify the target demographics and inform content development.

The foundation of Brand USA’s consumer campaigns is an “always on” digital approach that engages and inspires international travelers to visit the United States. Brand USA’s consumer website is available in 16 market-specific formats and translated in eight different languages. Each site is mobile-responsive and geo-targeted, directing viewers to content on their preferred devices and in their native language.

The sites feature editorial and compelling content about destinations as well as interactive maps, a custom trip itinerary planning tool, consumer travel ratings, seasonal weather, and practical travel information. Brand USA continuously works to enhance these websites and drive traffic by adding content and developing interactive features. Brand USA operates social media accounts in each of the markets where the organization deploys a fully integrated presence, including Facebook, Instagram, and YouTube, as well as market-specific platforms.



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 very effective in highlighting the amazing diversity of the people, places, and unique experiences that make the USA the world's most aspirational destination.

Through the remainder of FY2022 and beyond, Brand USA will continue to leverage this creative platform to meet recovery needs. While United Stories has always been ideal for social and online video channels, the recovery campaign will include a series of deliverables that work cohesively across a variety of platforms and channels, including amplification through broadcast and out-of-home activation. The strategic framework for this recovery campaign is displayed in the graphic below.

## STRATEGIC FRAMEWORK

<b>BUSINESS GOAL</b>	<b>Lead the Recovery of the U.S. Travel and Tourism Industry</b>		
<b>MARKETING OBJECTIVES</b>	<b>Brand Perception, Consideration, Engagement &amp; Bookings</b>		
<b>CREATIVE PLATFORM</b>	<b>UNITED STORIES</b>		
<b>COMMUNICATION TASKS</b>	<b>Prove We're Ready</b>	<b>Welcome the World Back</b>	<b>Entice and Convert</b>
<b>CHANNELS/TACTICS</b>	<b>INFLUENCERS (OWNED) BRANDED CONTENT SOCIAL</b>	<b>TV OLV PR OOH NATIVE</b>	<b>AIRLINES, OTA, TOUR OPERATOR CO-OPS SEM</b>

United Stories recovery campaign objectives include:

- **Inspiration:** To saturate core markets with United Stories destination content and demonstrate the USA is ready and excited to have travelers back. (KPIs: impressions, views, engagements)
- **Consideration and planning:** Hyper-local content will allow the campaign to span from the greatest icons and national parks to off the beaten path experiences that locals would recommend. This is also a critical platform for partners to engage with the recovery campaign. (KPIs: clicks, site visits, time on site)
- **Conversion:** Drive activation by partnering with top tour operators and booking engines to nudge consumers down a path to booking in their market (KPIs: tour operator and OTA bookings, annual ROI study)



GoUSA TV is Brand USA's connected television network. It is available for free via linear channels and on-demand apps, effectively capitalizing on the growth of global households cutting broadcast television programming in favor of on-demand entertainment. The channel attracts viewers with its range of original and licensed episodic content, documentaries, and films about U.S. destinations and experiences. GoUSA TV showcases the vast variety of experiences available to 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 100 hours of shows covering every state and territory in the USA, including 47 series and seven feature 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. "National Parks Adventure" 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, right as the pandemic began. In FY2022 and FY2023, Brand USA will renew distribution of and in-market activations around Into America's Wild.

## PARTNER INTEGRATION/COOPERATIVE MARKETING

Brand USA is only able to find success by coordinating with partners within and outside the travel industry. Partner organizations include destination marketing organizations, travel agents, tour operators, hotel and lodging companies, attractions, retailers, airlines, and others. Engaging partners of all sizes allows Brand USA to highlight iconic points of interest and small-town discoveries that appeal to international visitors and to help those stakeholders participate in recovery efforts and regain their international arrivals market.

Cooperative marketing weaves together the many stories and voices that make up 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.

Many of these programs rely on Brand USA infrastructure and make it possible for partners to enter global markets they would be challenged to reach on their own. For example, Brand USA operates a comprehensive digital presence in China, which requires significant time and investment beyond the reach of many destinations and travel companies. Other examples include the Global Inspiration Program and various Multichannel programs.

## TRAVEL TRADE ENGAGEMENT

Brand USA's travel trade outreach is designed to boost the quantity and variety of bookings made by in-market tour operators, travel agents, and other travel professionals. Presenting a unified message to the international travel trade alongside U.S. destinations and companies at events like trade shows, sales missions, road shows, training initiatives, and familiarization tours is an important component of increasing and broadening the sale of travel to the USA. And throughout the year, Brand USA works to educate domestic partners about the

international marketplace and the international travel trade on the diversity of travel opportunities in the USA.

These travel trade efforts are supported by Brand USA's network of in-country firms. These “boots on the ground” help Brand USA build a strong presence and manage relationships; develop itineraries and promotions to highlight new travel experiences; and educate and inspire the travel trade to better promote the USA to, through, and beyond the gateways. Brand USA maintained representation in more than 20 markets prior to the pandemic and will scale back up in the months ahead. Brand USA also will undertake efforts to reimagine the role of in-market representation to provide more infrastructure to industry stakeholders so they can find success in key markets without spending as much of their budget on overhead costs. A few of the marquee programs that Brand USA will bring forward over the coming months and years are outlined below.

Brand USA's familiarization tours, or “fams” bring groups of travel agents and tour operators to destinations in the United States to provide firsthand knowledge of new experiences and itineraries they can offer to customers back home. The highest-profile Brand USA familiarization tours are “MegaFams,” which are the largest multi-itinerary, simultaneous familiarization tours conducted in the United States. Brand USA organizes and coordinates these diverse U.S. travel experiences in order to more fully promote multiple destinations. They are especially effective in motivating the travel trade to sell

SPRINGFIELD, MISSOURI



destinations to, through, and beyond the gateways to their clients because the itineraries include a broad range of travel experiences, attractions, and brands from popular gateway cities to off-the-beaten-path encounters. Since the first MegaFam in 2013, more than 1,000 international travel sellers have visited all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

During the pandemic, Brand USA Global Marketplace became a true central meeting point for supplier and buyer partners alike. The platform continues to be an important tool even as face-to-face meetings resume, and exciting new innovations continue to debut on it. For example, in FY2022 and into FY2023, Brand USA will fully unveil the new International Pavilion, which is a one-stop resource for U.S. travel industry stakeholders interested in marketing their destinations, hotels, or attractions internationally. The International Pavilion will consist of specific country hubs that provide market introductions and updates on the travel trade and media landscapes, market research, air connectivity details, as well as key trade, market, and media contacts.

The key objectives of the International Pavilion include:

- A more knowledgeable audience and better use of limited funds for international marketing;
- Greater diversity of travel suppliers on the marketplace platform;
- Greater partner engagement with Brand USA in more markets;
- More engagement with international trade partners plus sustained relevance of Brand USA Global Marketplace

Launched in November 2021, the UK hub was the first market in the International Pavilion, and was followed by Germany and Ireland by January 2022. The International Pavilion will expand to other core target markets throughout FY2022 and beyond.

Finally, Brand USA Travel Week Europe will continue to innovate and provide value to the U.S. travel and tourism industry. After taking place on Brand USA Global Marketplace in 2020, the 2021 edition of the event was the first face-to-face gathering of U.S. and European travel industry leaders outside the United States since the beginning of the pandemic. By showcasing the diverse range of travel experiences in the USA and reengaging critical business contacts, the event provided value to buyers and suppliers and positioned the United States competitively for a robust recovery of the European leisure market. In 2022, the show will take place in Frankfurt and will continue to bring together hundreds of stakeholders of all sizes with hundreds of the top producing travel trade and media from all around Europe. This disruptive model has proven immensely popular with the domestic travel industry because of the quality of the programming and the eschewing of the noisy, expensive, and competitive environment of the legacy European trade shows.



## PUBLIC RELATIONS

Public relations are an important tool in the destination marketing toolbox. This has been particularly true over the past two years as it has been important to keep the USA top of mind among consumers and trade despite not spending on paid media. Brand USA will continue to pitch key global and market-specific media on topics ranging from themes such as road trips and culinary to Brand USA programs like GoUSA TV to interesting consumer hooks including World Book Day and Pride Month. Earned media will be an important complement to paid media strategies and will meet a critical need among stakeholders, especially those without an international presence. In fact, toward the end of FY2022 and into FY2023, Brand USA will embark on an ambitious public relations initiative to raise the collective voices of the travel industry and beyond to celebrate important cultural features of communities throughout the country. This initiative will remind the world why the United States remains the top aspirational destination and invite travelers to share in the experience.

## PUBLIC-PRIVATE COLLABORATION

Brand USA works closely with a variety of federal government partners to market the welcome, provide travel policy information, and amplify U.S. economic and diplomatic efforts in-market. Much of this collaboration is coordinated through the National Travel and Tourism Office at the U.S. Department of Commerce, which is the official government liaison office to Brand USA.

Brand USA works closely with Customs and Border Protection and the Bureau of Consular Affairs to develop market-specific visa and entry policy language for dissemination via digital and print channels. This includes coordinating on policy language when there are changes to or misperceptions about visa or entry procedures. In-market teams collaborate with U.S. embassies and consulates to deliver visa and entry policy information to travel agents and tour operators as a component of Brand USA's travel trade outreach. Customs and Border Protection and the Bureau of Consular Affairs often participate in Brand USA-organized trade shows and sales missions around the world to deliver travel policy information.

Brand USA also works closely with the U.S. Commercial Service, State Department, and others on a host of in-market activities around the world, including special film screenings, industry roundtables, PR events, and promotional opportunities in markets where Brand USA does not have a fully integrated presence. Brand USA has distributed and will refresh a toolkit of promotional materials tailored to U.S. embassies and consulates abroad.

Finally, Brand USA will enhance ongoing collaboration with a wide variety of federal agencies 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.

As a new National Travel and Tourism Strategy is unveiled in FY2022, Brand USA will have a critical role to play as the primary mode of promoting the destination to consumers, trade, and media. Brand USA will also continue to bring 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.

BRAND USA

## CONNECT WITH US

### COMPANY, INDUSTRY, AND PARTNER INFORMATION



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