



PUBLIC SESSION

July 26 , 2023 | 10 a.m. - 12 p.m.

CHAIR OPENING



Todd Davidson
Chair
Brand USA Board

- Call the meeting to order
- Approve the meeting minutes from April 18, 2023*
- CEO Report
- FY2023 YTD Financial Report
- FY2023 Marketing Report
- FY2024 Business Plan*

CEO REPORT



Chris Thompson
President & CEO
Brand USA

- **Ongoing Initiatives**
 - Organizational Strategic Planning
 - Travel Week Europe 2023
- **Recent Highlights**
 - Japan/South Korea Sales Mission
 - Congressional Testimony
 - IPW 2023



USA

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Year To Date
June 30, FY2023

FINANCIAL REPORT



Elliott Ferguson
Treasurer



Donald Richardson
Chief Financial, Diversity
& Inclusion Officer

- Year-to-Date (YTD) March FY2023 Financial Update
- Discussion / Q&A

YTD FY2023 FINANCIAL HIGHLIGHTS

(As of June 30, 2023)

- Revenue

Total revenue YTD: \$79.6M

- Cash Contributions - \$40.2M
- In-Kind Contributions - \$39.0M
- Sponsorships and Other - \$0.3M

- Expenses

- Total Program Expenses: \$116.2M

- Cash

- Cash Reserves are strong.

- Travel Promotion Fund.

- We anticipate meeting the ESTA match for FY2023 by fiscal year-end (\$117M).



FY2023 Marketing Report



Staci Mellman
SVP, Integrated Marketing



Cassady Bailey
VP, Partner Engagement
& Marketing

MARKETING REPORT

- Campaign Performance Tracker: This is Where it's At
- FY2023 Current Highlights
 - GoUSA TV
 - RHS Garden Show
 - July 4th Events Around the World
 - Social Media Highlights
 - Partner Marketing Highlights
- Forthcoming Research
- Brand Refresh



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FY2023 Marketing Report

Campaign Performance Tracker: This is Where It's At

FY2023 Campaign Strategy Recap

Campaign layers aligned with the traveler journey:

Branding & Inspiration: *This is Where It's At*

Drive reach & top of mind awareness

Education: *United Stories*

Increase familiarity & consideration through video or article content

Shopping: *Travel Endemic & Paid Search*

Increase intent through site visitation



Advertising Already Making Impact

Campaign efforts live across 11 countries

Incremental in-kind dollars secured with affinity partners, allowing for reinvestment with new partners (Booking Holdings) & market expansion (Japan)

Brand USA firsts:

- Competitive conquering strategy
- Audience-first programmatic strategy
- Paid TikTok campaigns
- Booking Holdings partnership



This is where it's at.

Savannah, Georgia

LEARN MORE

USA
VisitTheUSA.com

The advertisement features a photograph of a person walking down a tree-lined path in Savannah, Georgia. The text "This is where it's at." is overlaid in large white font. Below the photo, a dark blue banner contains a location pin icon, the text "Savannah, Georgia", a "LEARN MORE" button, and the Brand USA logo with the website "VisitTheUSA.com".

FY2023 Q3 Performance Results

2.83B

Impressions

487MM

Completed Video Views

3.2MM

Web conversions

Branding & Inspiration

- 1.2B impressions
- \$0.01 CPCV
- +80% exceeding CPCV benchmark

Education

- 48MM completed views
- 25MM completed 2-3 min views
- +40% exceeding CPCV benchmark

Shopping

- +2MM QoQ traffic lift
- \$0.96 CPC (exceeds benchmark)
- 15.5MM clicks

The logo for Visit The USA, featuring the letters 'USA' in a white, pixelated font on a blue square background.

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A scenic view of a city skyline across a body of water. In the foreground, two people are riding a yellow and blue inflatable tube down a river. The background features a mix of brick and modern buildings, including a prominent white skyscraper with a pointed top. A large white bridge with arches is visible on the right side. The sky is blue with scattered clouds.

FY2023 Current Highlights

GoUSA TV Viewership Study x Samsung

Objective

To measure the impact GoUSA TV has on driving intent to travel.

Additional objectives:

- Are viewers of the GoUSA TV channel more likely to travel to the USA?
- What drives people to watch the GoUSA TV channel?
- What about the channel makes viewers more likely to travel to the USA?

Methodology

- Study conducted April - May 2023
- 481 Samsung Smart TV owners (224 watch GoUSA TV and 257 do not watch)
- 3-min online survey

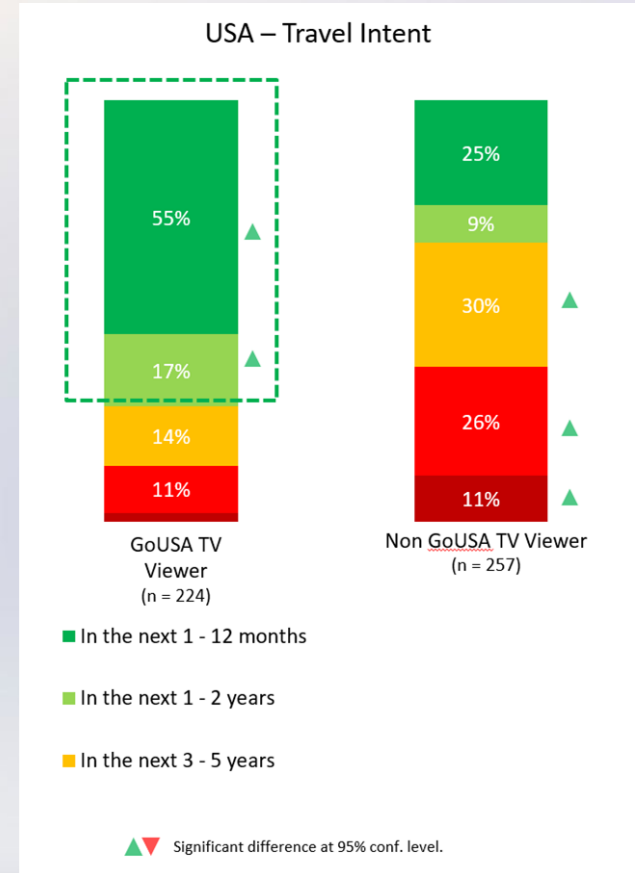
GoUSA TV Viewership Study x Samsung Key Takeaways

1. GoUSA TV drives travel intent

- Viewers are 2X more likely to consider a USA holiday in the next 12 months versus non-viewers.

2. GoUSA TV viewers seek information about the USA after viewing content.

- 82% have either talked with someone or browsed online (*education phase*)
- 28% have either spoken with a travel agent and/or booked a trip to the USA (*shopping & booking phase*)

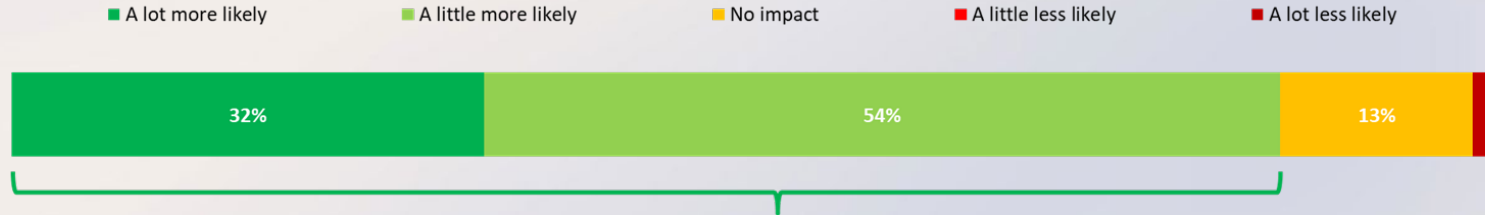


GoUSA TV Viewership Study x Samsung Key Takeaways

3. GoUSA TV drives travel consideration to the USA

After watching channel content,

- 86% of viewers are at least somewhat likely to consider traveling to the USA for holiday
- 32% of viewers are a lot more likely to consider traveling to the USA



The GoUSA TV channel...

- Promotes the USA as a great place to visit
- Shows another side of the USA that cannot be found in standard 'brochures'
- Illustrates the geographical diversity of the USA
- Showcases the different cultures, especially the different types of food

"The way it perceived America and the great places to go."
Male / Aged 35-44

"It points out things that are not always in brochures and make it really interesting."
Female / Aged 55-64

"They've made it seem more fun for a family than just Disneyland."
Female / Aged 16-24

"It makes you take interest in certain things such as places and food to try."
Female / Aged 16-24

"It made me more aware of all the different areas of the USA and the wide variety of different things to do."
Female / Aged 45-54

"I like their shows on different parts of the USA. They showed all the beautiful scenery and made the destinations sound exciting." Male / Aged 45-54



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A 360 Approach

RHS Hampton Court Palace Garden Festival



July 4th Events



A person with a prosthetic left leg is captured in mid-stride, running across the crest of a large sand dune. The dune is situated within a desert canyon, with towering, layered rock walls on either side. The sky is a vibrant blue, filled with wispy white clouds, and the sun is visible at the top center, creating a bright glow. The overall scene conveys a sense of adventure and physical achievement.

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Social Media Highlights

TikTok: A Growth and Engagement Driver

Launched in January 2023

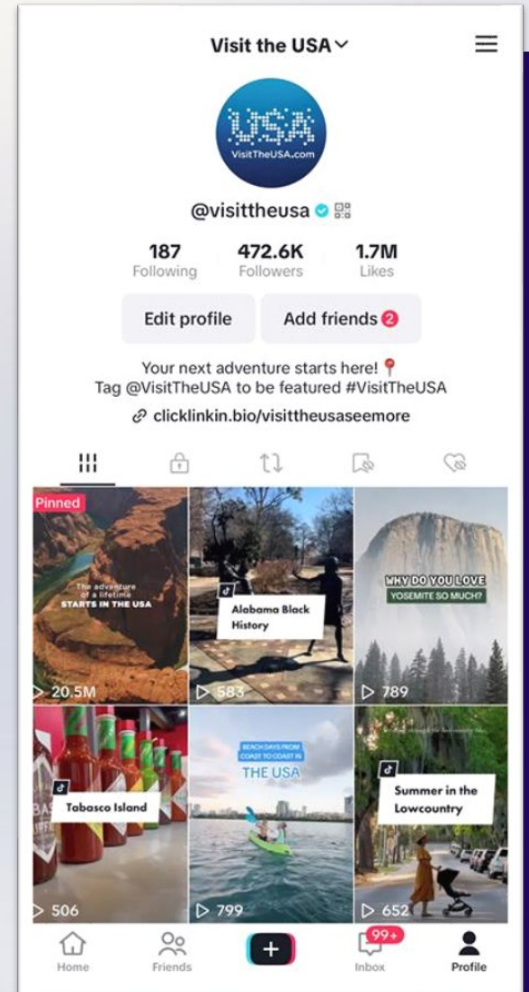
548K
followers

92M+
views

2.0M+
likes

92%
positive &
neutral

Our boosting strategy delivers our content to targeted audiences in key markets, and has exceeded all benchmarks.



An aerial photograph of a coastal resort. In the foreground, a large, multi-story stone building with a gabled roof sits on a rocky peninsula. To its left is a green lawn and another large building. A winding road leads from the buildings towards a large, curved green area that appears to be a golf course. The coastline is rugged with waves crashing against the rocks. In the background, there's a large body of water with a bridge and more buildings on the distant shore.

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Partner Marketing Highlights

FY2023 PARTNER PARTICIPATION OVERVIEW

As of June 30, 2023



1,170

TOTAL
PARTNER
PARTICIPATIONS*



270

ACTIVE
PARTNERS**



3.63

AVERAGE
PARTICIPATIONS
PER PARTNER**



58

UNIQUE
PROGRAMS
AVAILABLE



8

FIRST TIME
CONTRIBUTORS
/PARTICIPANTS

FY2023 PROGRAM OVERVIEW

As of June 30, 2023



563

CAMPAIGNS
LAUNCHED*



1.5B+

IMPRESSIONS
DELIVERED**



19

MARKETS WHERE
CAMPAIGNS RAN*



\$57M+

ATTRIBUTABLE
BOOKINGS
MEASURED***

* includes General Media participations, Affinity programs, custom programs, Partner Marketing Programs, Trade activities

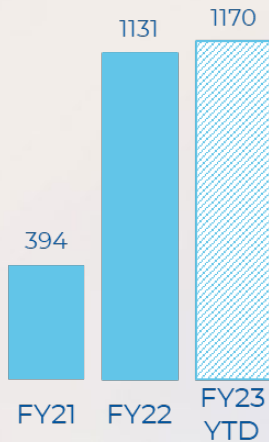
** includes custom programs and Partner Marketing Programs

*** includes Multi-Channel campaigns and ITG campaigns

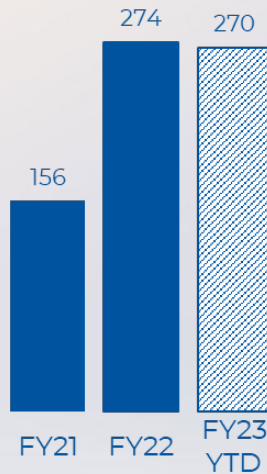
PARTNER PARTICIPATION OVERVIEW

FY2021 vs. FY2022 vs. FY2023 YTD

Total # of Partner Participations



Total # of Unique Partners



- We have surpassed the total # of partner participations in FY2022.
- In FY2021, we had 19 partner programs available; in FY2023, we've offered 58 so far.
- Our average # of participations YTD FY2023 is 3.6 - officially matching our FY2022 average.
- In FY2023, we are pacing to engage with more than FY2022's # of unique partners.

* includes General Media participations, Affinity programs, custom programs, Partner Marketing Programs, Trade activities

** includes custom programs and Partner Marketing Programs

*** includes Multi-Channel campaigns and ITG campaigns



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Forthcoming Research

Research Upcoming projects

- Creative Testing Survey - July 2023
- International Branding Focus Groups - August 2023
- Market Intelligence Study - August 2023
- Partner Intelligence In-Depth Interviews - October 2023
- Advertising Effectiveness Study - February 2024
- Segmentation Study - TBD



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Brand Refresh | Process & Timeline

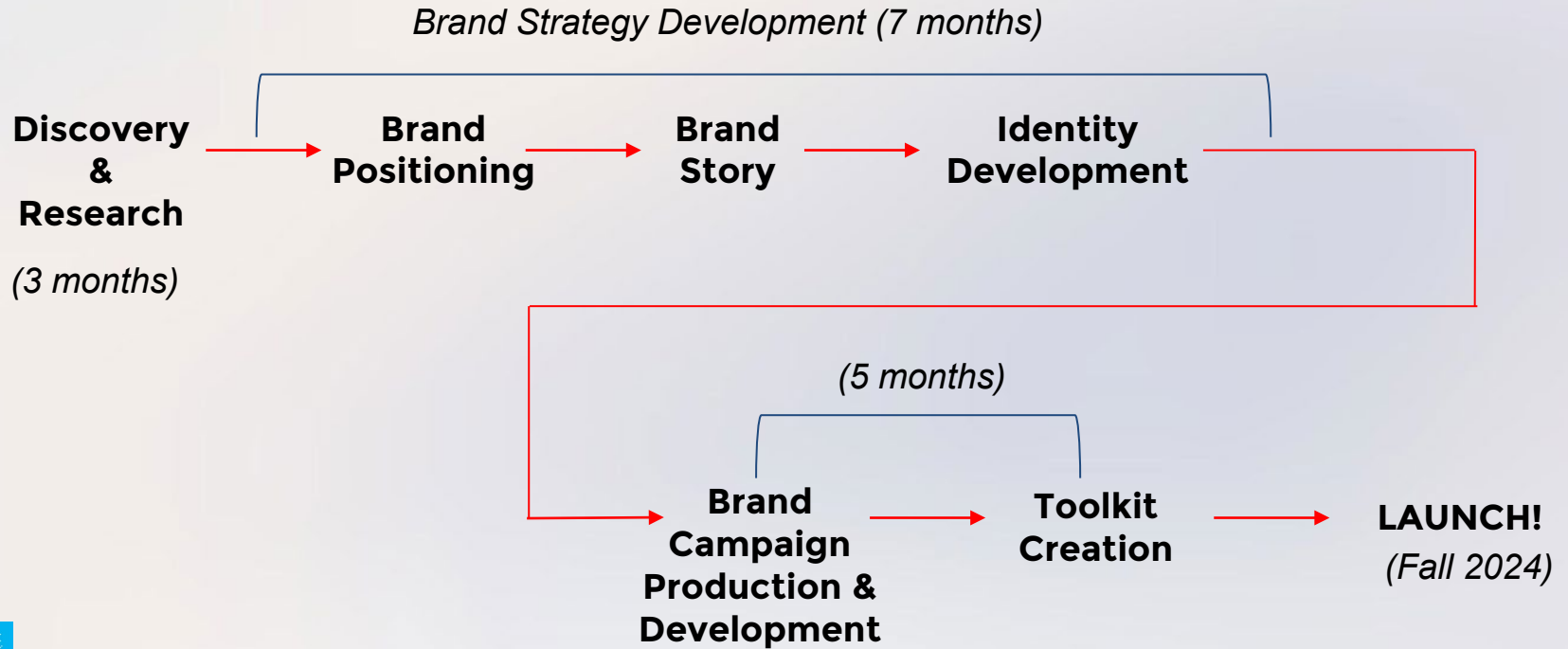
Brand Refresh

In FY2024, Brand USA will undergo a comprehensive consumer brand refresh in order to strengthen the brand presence of the USA as a travel destination.

The goal of this work is to improve brand perception of the USA as a travel destination during a time when competition is fierce and headwinds are strong.



Brand Refresh Process



We'd like your Input! Survey closes August 20



An aerial photograph of a white motorboat with a brown deck, filled with people, moving across clear turquoise water. The boat is leaving a white wake. To the left, a rocky shoreline is visible. The entire scene is framed by a white border.

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FY2024 Business Plan

FY2024 Business Plan



Aaron Wodin-Schwartz
SVP, Public Affairs



Staci Mellman
SVP, Integrated Marketing

STRATEGIC PLATFORM

WE EXIST TO (VISION)

Enrich lives by welcoming the world to travel to the USA

THEREFORE WE (MISSION)

Create community prosperity through partnership, leadership, and travel inspiration

WE DELIVER FOR

The U.S. travel industry and the communities of the USA

AND DO IT ALL WITH (VALUES)

ACCOUNTABILITY

We strive to be our best in and out of work to deliver results.

COLLABORATION

We are stronger when we come together.

COURAGE

We are bold and take smart risks.

INCLUSIVITY

We are inclusive and welcoming to all.

PARTNERSHIP

We add and create value in our relationships.

ORGANIZATIONAL OBJECTIVES

Establish and
maintain the
USA as the
preferred global
travel
destination

2024 GOALS

Create innovative global marketing programs to inspire and sustain visitation.

2024 STRATEGIES

- Build positive global brand perception
- Increase marketing effectiveness on intent to visit / desirability

2024 KPIS

- 3% increase in overall brand perception of the USA as a travel destination (macro) ; 6% increase in brand perception from those exposed to Brand USA marketing activities (org)
- 3% YoY growth in travel intent (macro); 5% increase in travel intent for those exposed to Brand USA advertising (org)

ORGANIZATIONAL OBJECTIVES

Contribute to community prosperity by driving international visits and spend

2024 GOALS

Build a foundation for long-term growth of the U.S. visitor economy.

2024 STRATEGIES

- Grow visitation from key international markets
- Increase visitor spend through growing frequency of visits, extending length of stay, and / or pursuing affluent travelers
- Drive traveler dispersal to destinations across the U.S.
- Expand Brand USA's presence in markets with the greatest opportunities for growth

2024 KPIS

- 18% YoY international visitor growth from Brand USA Core markets (macro); 30% YoY increase in incremental visitation attributable to Brand USA (org)
- 17% YoY growth in visitor spend (macro); 35% YoY visitor spend attributable to Brand USA activities (org)
- Include a minimum of 180 “beyond the gateway” destinations within Brand USA marketing efforts
- A minimum of 5% of Brand USA media budget invested in growth markets

ORGANIZATIONAL OBJECTIVES

Lead & engage
stakeholders
of the U.S.
travel industry

2024 GOALS

Develop valuable programs for stakeholders to support international travel efforts.

2024 STRATEGIES

- Nurture existing collaborative partnerships
- Expand opportunities for Partner engagement
- Maintain financial contributions from partners
- Engage and promote a diverse base of U.S. stakeholders and create opportunities throughout the travel industry for underrepresented groups

2024 KPIS

- Maintain 90% partner sentiment that Brand USA provides value to their organization; Maintain annual partner retention rate of over 90%
- 300 unique stakeholder participants across all programs
- Fulfill the \$50MM cash contribution requirement
- Establish a benchmark for Brand USA's support / promotion of minority-owned, small, and rural businesses

ORGANIZATIONAL OBJECTIVES

Maintain excellent organizational integrity and reputation, setting the standard for the global travel industry

2024 GOALS

Evolve Brand USA for the future and grow our culture and team

2024 STRATEGIES

- Maintain top standards that protect our public integrity
- Build positive awareness of Brand USA within the global travel industry
- Leverage our leadership position to promote thought leadership and action in diversity, equity, and inclusion within the travel industry

2024 KPIS

- Achieve 100% compliance and a clean audit
- 10% increase in overall positive earned media impressions for Brand USA mentions in U.S. or Global Travel Trade or business publications
- Execute Year 1 tactics of Brand USA's DEI Strategy

ORGANIZATIONAL OBJECTIVES	2024 GOALS	2024 STRATEGIES	2024 KPIS
Establish and maintain the USA as the preferred global travel destination	Create innovative global marketing programs to inspire and sustain visitation	<ul style="list-style-type: none"> ● Build positive global brand perception ● Increase marketing effectiveness on intent to visit / desirability 	<ul style="list-style-type: none"> ● 3% increase in overall brand perception of the USA as a travel destination (macro) ; 6% increase in brand perception from those exposed to Brand USA marketing activities (org) ● 3% YoY growth in travel intent (macro); 5% increase in travel intent for those exposed to Brand USA advertising (org)
Contribute to community prosperity by driving international visits and spend	Build a foundation for long-term growth of the U.S. visitor economy	<ul style="list-style-type: none"> ● Grow visitation from key international markets ● Increase visitor spend through growing frequency of visits, extending length of stay, and / or pursuing affluent travelers ● Drive traveler dispersal to destinations across the U.S. ● Expand Brand USA's presence in markets with the greatest opportunities for growth 	<ul style="list-style-type: none"> ● 18% YoY international visitor growth from Brand USA Core markets (macro); 30% YoY increase in incremental visitation attributable to Brand USA (org) ● 17% YoY growth in visitor spend (macro); 35% YoY visitor spend attributable to Brand USA activities (org) ● Include a minimum of 180 "beyond the gateway" destinations within Brand USA marketing efforts ● A minimum of 5% of Brand USA media budget invested in growth markets
Lead & engage stakeholders of the U.S. travel industry	Develop valuable programs for stakeholders to support international travel efforts	<ul style="list-style-type: none"> ● Nurture existing collaborative partnerships ● Expand opportunities for Partner engagement ● Maintain financial contributions from partners ● Engage and promote a diverse base of U.S. stakeholders and create opportunities throughout the travel industry for underrepresented groups 	<ul style="list-style-type: none"> ● Maintain 90% partner sentiment that Brand USA provides value to their organization; Maintain annual partner retention rate of over 90% ● 300 unique stakeholder participants across all programs ● Fulfill the \$50MM cash contribution requirement ● Establish a benchmark for Brand USA's support / promotion of minority-owned, small, and rural businesses
Maintain excellent organizational integrity and reputation, setting the standard for the global travel industry	Evolve Brand USA for the future and grow our culture and team	<ul style="list-style-type: none"> ● Maintain top standards that protect our public integrity ● Build positive awareness of Brand USA within the global travel industry ● Leverage our leadership position to promote thought leadership and action in diversity, equity, and inclusion within the travel industry 	<ul style="list-style-type: none"> ● Achieve 100% compliance and a clean audit ● 10% increase in overall positive earned media impressions for Brand USA mentions in U.S. or Global Travel Trade or business publications ● Execute Year 1 tactics of Brand USA's DEI Strategy



FY2024 Brand USA Market Objectives

- Strengthen the brand presence of the USA as a travel destination.
- Improve perception of the USA as a travel destination.
- Grow U.S. market share.
- Disperse travelers to multiple destinations across the USA.
- Increase traveler spend.
- Increase visitation and frequency of visits.

FY2024 Target Markets

North America

Canada
Mexico

Latin America

Argentina
Ecuador
Peru
Chile
Colombia
Brazil

Europe

United Kingdom
Ireland
Germany
France
Spain
Italy
The Nordics
(Denmark, Norway, Sweden, Finland, Iceland)
Benelux
(Belgium, Netherlands, Luxembourg)

Asia & Oceania

Australia & New Zealand
South Korea
Japan
India
China
Southeast Asia

Brand USA Marketing Initiatives



- Brand Marketing and Global Advertising

- Social Media & Content Creator Marketing
- United Stories
- Content Marketing
- Digital & Print Magazine
- Earned Media
- Cooperative Marketing

- Brand USA Sales Missions and B2B Events
- Brand USA Global Marketplace & International Pavilion
- Brand USA Travel Week
- Travel Trade Partnerships
- M.I.C.E. Travel
- Tourism Exchange USA
- Cooperative Marketing Activation Programs
- Online Travel Agency (OTA) Campaigns

FY2024 Global Marketing Activity Timeline

	FY 2024											
	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
AUSTRALIA	Consumer Marketing			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing			Coop Marketing
BRAZIL	Coop Marketing					Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing			
CANADA	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		Coop Marketing		Coop Marketing		Coop Marketing	Coop Marketing
COLOMBIA				Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing
FRANCE	Coop Marketing	Coop Marketing			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		
GERMANY		Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		
INDIA			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing			
JAPAN	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	
MEXICO	Coop Marketing				Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		Coop Marketing	Coop Marketing
S. KOREA			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing
U.K.				Coop Marketing	Coop Marketing		Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing



Coop Marketing	Light Blue
Consumer Marketing	Medium Blue
Missions & MegaFams*	Dark Blue

*dates subject to change



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FY2024 Budget

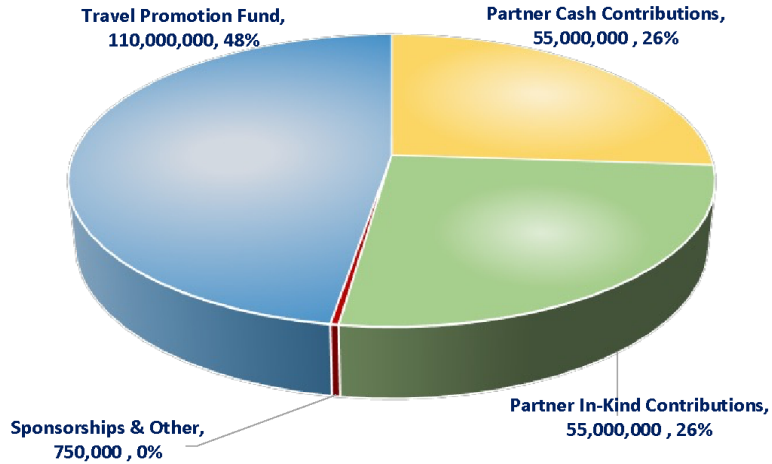
FY2024 Budget Planning



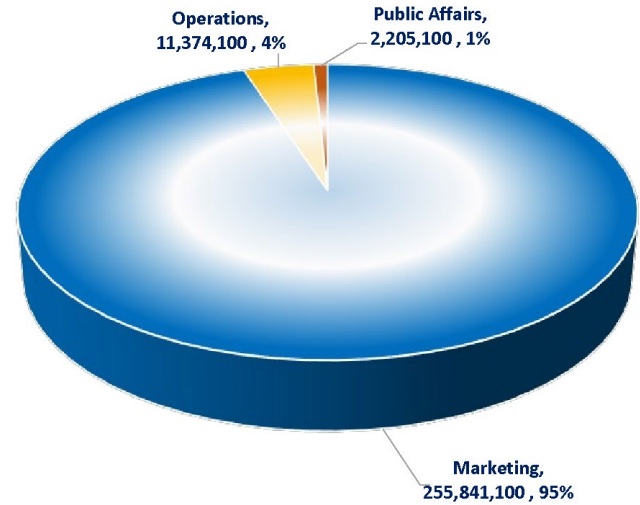
Donald Richardson
Chief Financial, Diversity
& Inclusion Officer

FY2024 Budget

FY 2024 Revenue Budget



FY 2024 Expense Budget



2023

FALL

Washington, DC | NOVEMBER 14-15

Next Board of Directors Meeting



Questions & Answers

USA

Brand USA

The logo for Visit The USA, featuring the letters 'USA' in a stylized, pixelated font.

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Brand USA

CONSUMER

VisitTheUSA.com



Visit The USA

GoUSA TV

TRAVEL INDUSTRY

TheBrandUSA.com

 @BrandUSA

 BrandUSATV

 BrandUSA

 Brand USA

The text 'Thank You' is displayed in a large, white, sans-serif font, centered over a semi-transparent dark blue rectangular background. The background image is a cityscape at dusk, featuring a prominent clock tower and various skyscrapers.