



Brand USA

World in Review 2013-14



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WELCOME

We are pleased to present the Brand USA Global Year-In-Review. Within these pages you will find updates on Brand USA's accomplishments around the world as we embark on our third year of operation. In 2012, Brand USA launched a successful, first-ever, direct-to-consumer marketing campaign for the United States, greatly increasing intent to visit in our inaugural launch markets of Canada, Japan, and the United Kingdom. The following year, we redeployed this highly effective campaign in those same three markets and are expanding into Australia, Brazil, China, Hong Kong, Germany, Mexico and South Korea. These 10 markets represent 75% of inbound travel to the United States. In addition, we are broadening our footprint around the globe with in-market representation and trade show participation in a total of 26 markets.

As a cooperative destination marketing organization, we add and create value for the nearly 400 companies we are proud to call partners, both within and outside the travel and tourism industry. Together, we are able to market to the world that the USA is a diverse nation, full of incredible destinations and experiences.

Brand USA aspires to exceed industry expectations and position itself to grow the United States' share of the global travel market. According to a study recently conducted by Oxford Economics, our marketing efforts have had a significant and positive impact on U.S. international arrivals and the U.S. economy. Brand USA's marketing campaigns generated 1.1 million incremental visitors to the United States; who spent \$3.4 billion; supported 53,000 new jobs; and generated a 47:1 return on investment.

We've accomplished a lot over the past year, and we thank you for your support, which made it all possible. With your commitment and engagement, we have made great things happen. We look forward to more of the same momentum and success in the months and years ahead.

Together we are Brand USA.

Christopher L. Thompson
President & CEO
Brand USA



BRAND USA OVERVIEW

About Brand USA

Brand USA was established by the Travel Promotion Act to spearhead the nation's first international marketing effort to promote the United States as a premier travel destination and communicate U.S. entry/exit policies and procedures. Formed as the Corporation for Travel Promotion, the public-private entity began operations in May 2011 and does business as Brand USA.

Through its consumer facing brand and call-to-action—Discover America—Brand USA inspires travelers to explore the United States of America's boundless possibilities.

This first-ever effort is expected to put the United States on equal footing with other countries' tourism efforts and bring millions of new international visitors to the United States who spend billions of dollars during their travels— thus creating thousands of new American jobs each year.

Brand USA works in close partnership with the travel industry to maximize the economic and social benefits of travel—all at no cost to U.S. taxpayers.

The organization is supported by contributions from the private-sector that are matched by fees paid by international travelers to the Electronic System for Travel Authorization (ESTA) program. ESTA is an automated system implemented by the Department of Homeland Security in 2008 that determines the eligibility of visitors from 37 international markets to travel to the United States under the Visa Waiver Program (VWP). ESTA authorizations are generally valid for multiple trips over a period of two years or until the traveler's passport expires, whichever comes first.

For industry or partner information about Brand USA, visit www.TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at DiscoverAmerica.com.



Our Role in the Travel Industry

Brand USA plays a unique role as the nation's first cooperative destination marketing organization.

We focus our efforts on delivering programs and platforms that increase awareness and enhance the image of the United States among worldwide travelers in order to increase intent to travel to the United States and, most importantly, visitation and spend. In addition to promoting the United States as a premier travel destination through consumer and travel-trade marketing, advertising, events and promotions, we work with the Federal government to communicate U.S. entry and security processes that will help

make the journey to and into the United States easier and more welcoming.

The collective and successful efforts of Brand USA, the U.S. Department of Commerce Travel and Tourism Advisory Board, and the U.S. Travel Association will increase the desire and ability for international travelers to come to the United States. And as we welcome millions of new international visitors, we make our country stronger—creating jobs essential to the economy and providing opportunities for millions of Americans.

LEADERSHIP ROLES IN THE TRAVEL INDUSTRY TO INCREASE INBOUND TRAVEL TO THE UNITED STATES



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U.S. TRAVEL
ASSOCIATION

PROMOTE

Lead the nation's global marketing effort to increase inbound travel to the United States

Enhance awareness and the image of the USA as a diverse, exciting and premier travel destination

Create programs and platforms that add and create value for partners and support the National Travel and Tourism Strategy

Work with the Federal agencies to develop programs to communicate U.S. entry and security processes and create a welcoming experience for international tourists

ADVISE

Travel and Tourism Advisory Board

Advise and provide policy recommendations of the Secretary of Commerce on issues affecting the U.S. travel industry

ADVOCATE

As the leading voice of the U.S. Travel industry, increase travel to and within the United States

Advocate for and advance pro-travel policies and remove travel barriers

Provide authoritative research and networking opportunities

Communicate the positive wide spread impact of travel to policy makers and the media

Leverage the collective strength of everyone who benefits from travel to grow their business beyond what they can do individually

BRAND USA GLOBAL TIMELINE

FEBRUARY 2013

MARCH

APRIL

MAY

JUNE

JULY

Brand USA & British Airways co-op advertising (UK)

ITB Berlin 2013
World Baseball Classic sponsorship (Japan)

Brand USA China offices opened (China)

The Guardian 6-month media partnership launches (UK)

WTM Latin America São Paulo

COTTM (China)

ConnectWorldwide BRANDSTORY Asia Commence work as team Brand USA (Taiwan & Hong Kong)

Inaugural Brand USA Megafam with British Airways and American Airlines (UK & Ireland)

Marketing partnership with United Airlines (Korea)

Hainan Airlines press conference for Beijing to Chicago direct flight (China)

IPW Las Vegas
US Tourism Exchange Year meeting (Japan)

Hana Tour and Interpark Tour partnership launches (Korea)

ITE Hong Kong 2013

USA Discovery Program launches (UK & Ireland)

Appointment of Sartha Global Marketing as Brand USA, India office (India)

Air Berlin joint promotional campaign commences (Germany)

Brand USA launched in Australia & New Zealand

Brand USA signs multi million dollar partnership with STA Travel

Qatar Airways marketing campaign (India)

Japan Airlines launches new San Diego flight campaign (Japan)



AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

JANUARY 2014

Press Conference in Beijing for launch of Chinese website www.GoUSA.cn (China)

Ski&Golf Fair Consumers Day (Brazil)

Visit USA Costa Rica and Guatemala Shows

RTL Media's Discover America radio campaign commences (Germany)

Turner Japan "Let's Go America" campaign launches (Japan)

Brand USA India Mission 2013 (India) September - ABAV, São Paulo (Brazil) September - FIT (Argentina)

Ignite Travel's "My Hawaii" campaign commences (Australia)

United Airlines partnership: Founding Asia Airline Partner (Taiwan, Hong Kong, China)

JATA, Japan

Discover America feature launches on United Airlines' in-flight magazine "LEADER'S REVIEW" (Japan)

FITA (Mexico)

KLM Air France media campaign launches (Germany)

Joint Consumer campaign with Lufthansa, Meier's Weltreisen, Dertour, Explorer Fernreisen, and Canusa (Germany)

ILTM Americas (Mexico)

Welcome China project in New York for 1,000 Chinese travelers (China)

US Tourism Leadership Summit with U.S.Travel in Chicago (China)

China International Travel Mart

Hong Kong Sales Mission

BS Fuji "Wonderful America" launches (Japan)

Consumer Campaign Launches (Korea) October - APT media campaign commences (Australia)

ITF Taipei, Taiwan

ITB Asia

San Francisco-Napa Valley Fam Trip (Brazil)

Launch of Hong Kong and Taiwan Consumer Campaign

Quantas 'Ausmerica' Mega fam (Australia)

Asiana In-flight media partnership commences (Korea)

Charley Boorman's USA Adventure broadcast (UK)

Brand USA Mexico and Central America Office opens

United States Sales Mission (Taiwan)

World Travel Market at Excel, London

ESPN 'United States of Sport' live November - EIBTM (Spain)

Brand USA Thanksgiving Dinners for Media (India)

Brand USA Brazil Office opens

Brazil American Airlines Ski Fam - Fampress Skiclub

Hawaiian Airlines and Asiana Airlines marketing partnership launched (Korea)

Marketing partnership with Singapore Airlines (Korea)

APN News Media 50 Dreams Campaign (print/digital) launched in New Zealand

Thomas Cook and Brand USA European Partnership announced

Vakantiebeurs (The Netherlands)

SATTE 2014 (India)

Inaugural Indian Media Fam (India)

Fitur (Spain)

BRAND USA EXECUTIVE LEADERSHIP & STAFF



CHRISTOPHER THOMPSON
President & CEO



ANNE MADISON
Chief Communications
Officer



DON RICHARDSON
Chief Financial Officer



TOM GARZILLI
Senior VP Global
Partner Marketing



ALFREDO GONZALEZ
Senior VP Global
Market Development



AMIR EYLON
VP Partner Engagement



JAY GRAY
VP Global Market
Development



KARYN GRUENBERG
VP Partner Programs



STANLEY MATTOS
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TIFFANY WADDELL
Director Sales



AARON WODIN-SCHWARTZ
Director Public Policy



CASSADY BAILEY
Manager Partner
Services



DEVON DOW
Manager Partner
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PHILIP JOSEPH
Regional Sales Manager
(Northeast)



ANNA KLAPPER
Development Manager
(IND, RUS, ME)



BLANCA ROMERO
Office Manager



JENNIFER ROSS
Development Manager
(CAN, EUR, AUS)



TALIA SALEM
Manager Social Media



SUZANA SHEPARD DURINI
Development Manager
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DIANNE TURNER
Regional Sales Manager
(Southeast)



BRIAN WATKINS
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BRIDGETT KRIDER
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BRIAN SCREPTOCK
Partner Services
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Executive Assistant,
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to CFO



JUDIE MACALINO
Executive Assistant
to CEO & CCO



RACHAEL PINGUELO
Receptionist



NINA TOTH
Executive Assistant,
Global Market
Development



LAUREN WILLIAMS
Executive Assistant,
Partner Services

BRAND USA AUSTRALIA & NEW ZEALAND

Brand USA Australia and New Zealand commenced operation in market in June 2013. Since then the team has initiated and established a range of promotional and development initiatives to establish Brand USA's presence and enhance consumer and trade perception of the breadth and diversity of the USA as a destination.

Market Overview

Country/Market Overview - Australia and New Zealand
The Australian economy continues to fare well when compared with many other western nations. Whilst the mining boom that sustained growth over the last 10 years is showing signs of retraction, the central banks' ability to adjust the cash interest rate to record lows has seen sustained consumer confidence, employment and strong property markets. This combined with a favorable exchange rate has seen continued growth in international travel.

The USA has certainly made the most of these conditions and is the number one long haul destination (and is third overall behind New Zealand and Indonesia). The USA has seen eight consecutive yearly records in passenger numbers and in the most recent calendar year, 2013, saw 1,190,000 Australian travellers and a record 201,000 from New Zealand.

Further to this, Oxford Economics research shows Australia as the highest YOY growth (11%) of the established markets to the USA, second only to Brazil.

Load factors on airlift are very strong and capacity must increase to sustain this growth. Most recently, United Airlines announced new non-stop flights, six times weekly, from Melbourne to Los Angeles, commencing October 2014. Performance should continue to be strong in 2014.

In New Zealand, the planets are currently aligning for very strong growth; new airlift with daily flights from Hawaiian Airlines, the strongest exchange rate in years and an improving economy are all forming optimum conditions for strong growth in travel to the USA.

ADVERTISING HIGHLIGHTS

February 2014 saw the launch of the "Land of Dreams" brand campaign in Australia. With 85% of travelers coming from Sydney, Brisbane and Melbourne, spend was focused on these Eastern Seaboard centres. To increase reach, a partnership with Qantas was created, providing both cash and in-kind contributions, as well as providing tactical fare specials and driving call-to-action. Campaign channels included:

- Television: Three 12-day bursts over two months from the 15 February.
- Large format Outdoor.
- Digital: A combination of display, linking and video
- Qantas Inflight: TVC shown on all domestic flights in March and April
- Qantas Aerobridge: Sydney, Brisbane and Melbourne in March

With LAX and DFW the two key ports for Qantas, partnerships with both Discover Los Angeles and Texas Tourism further boosted the campaign reach, and provided imagery and content for the U.S. presence on Qantas.com.

Media Highlights

APN

Brand USA and APN, one of the largest media owners in New Zealand, created a long-term advertising and editorial partnership. The partnership focuses on the New Zealand Herald (number 1 newspaper in New Zealand) and newzealandherald.co.nz. The shared objectives of this partnership are to support the volume “established” destinations, as well as diversify the perceptions and understanding of the breadth of the USA as a travel destination.

The partnership includes-

Advertising:

- Over 60 insertions of the “Land of Dreams” press ad over the initial 3 month period
- A digital display campaign delivering over 15 million impressions

Editorial:

- The joint development of an editorial plan that fulfils stated objectives
- The creation of an online hub with interactive maps, evolving content, video etc.
- The partnership launched in February 2014 and early indicators are strong with solid traffic being delivered to DiscoverAmerica.com.



Let's Travel Magazine

Brand USA formed a 12 month partnership with Lets Travel magazine that involved advertising and USA content in every issue, culminating with a dedicated USA magazine featuring strong Brand USA brand presence.



Public Relations & Visiting Journalist Program

Media Relations

Brand USA has driven a strong focus on trade media to both highlight in-market initiatives and to communicate resources available to the trade, resulting in extensive coverage. Activity with the broader media has involved story pitching, press releases and connecting interested journalists with the right PR contacts at the various state and city tourism bodies across the USA, as well as recruiting for the IPW Broadcast Media focus and leveraging future TV opportunities.

Visiting Journalist Program

Whilst early in its establishment our selective Visiting Journalist Program has achieved significant early results. Our strategy is to target journalists with pre-committed coverage of destinations and experiences that are aligned to Brand USA's objectives and selected focus themes. Highlights to date include a single trip by prominent travel journalist, Barry Divola, which yielded six stories.

Travel Trade Activities

Since its establishment, Brand USA Australia & New Zealand has developed a number of strong travel trade partnerships with key stakeholders. These partnerships have extended beyond straight advertising and have looked to influence product development, training and digital promotional channels.

Flight Centre

1 March 2014 saw the launch of a multi-million dollar partnership between Brand USA and Flight Centre Ltd (Australia's largest travel retailer), the largest agreement Flight Centre has ever established with a tourism body. This represents Brand USA's largest single partnership in this market.

Exclusive USA campaign periods in addition to digital activity and agent training will be rolled out over a 6 month period starting March 2014 as part of the first phase of the partnership. The campaign will run across all of Flight Centre Travel Group's core leisure brands in Australia; Flight Centre, Escape Travel, Student Flights and Travel Associates, as well as Flight Centre's in-house wholesaler, Infinity Holidays. Brand USA will conduct special workshops with each Flight Centre Ltd brand to define destination and thematic implementation plans. A training and development program will also be designed to help educate agents about the diversity of destinations and experiences on offer in the U.S. so this can then be shared with consumers.

The partnership has launched across 700 stores.

Buy-in opportunities for destinations across the U.S. will be presented at IPW.

Qantas

Brand USA partnered with Qantas on the Qantas-led USA campaign, 'Ausmerica'. The campaign included a number of elements; outdoor (billboards and a fuselage shaped moving sidewalk with Brand USA advertising), television, in-flight advertising of the "Land of Dreams" commercial and digital advertising, including a dedicated USA microsite through Qantas.com and Ambient. This significant campaign featured built-in agent incentives, the driver for the 'Ausmerica' agent fam.

Ignite Travel

Two LOA campaign partnerships were entered into with Ignite Travel; myCalifornia and myHawaii. Each campaign incorporated air, tourism and hotel partners from the region. Ignite recruited a team of dedicated USA specialist travel consultants for the campaign. Planning is now underway for the extension of the myUSA product range into other USA destinations.

Holiday Specialists

(now rebranded to "Hoot Holidays")

LOA campaign that included tactical fares with Hawaiian Airlines. Full page print ads in Sydney and Melbourne weekend press, as well as eDMs to Holiday Specialists' database during October and November 2013.





Agent Engagement and Activity

Travel agents continue to play a crucial role in the Australian and New Zealand markets with 55% of international bookings made with a travel agent. This is particularly important for the USA due to the high value and more complex nature of USA bookings.

Brand USA 'Ausmerica' Fam

In partnership with Qantas, Brand USA launched the markets first USA megafam. Agents were incentivized as a part of the 'Ausmerica' consumer campaign and the 50 top selling agents were invited to participate. Agents were split into five groups and went on one of the following five itineraries:

- Texas
- Arizona
- Florida
- New York and Massachusetts
- Louisiana

Each group was tasked with shooting a short video with a GoPro camera, highlighting their destination. After five days in each destination the full group met in Los Angeles for collaboration and sharing of experiences at Universal Studios Hollywood, where each video was shown and a winning team announced.

Feedback from agents was resoundingly positive, with post-fam surveys showing agents scoring their overall experience at an average of 4.85 out of 5.

Planning is now underway for the markets' next Megafam in partnership with Hawaiian Airlines and Hawaii Tourism Office, with 65 agents from across Australia and New Zealand.

Experiential Themes for Agent Development - Live Entertainment

Every six months, Brand USA Australia and New Zealand will launch key experiential themes to focus activity. These themes will remain a focus for 18 month periods. The themes will provide a framework to guide PR, trade development and training.

January 2014 saw the launch of the first theme, Live Entertainment (sport, music and theatre).

Key initiatives include:

- Trade presentations and training
- Agent tools
- Product development
- Media pitching

Travel Agent Training and Development

Travel agent training sessions have been run in Sydney, Brisbane and Melbourne with a focus on the Brand USA experience pillars and the communication of the many agent resources that are available to find more information. Participation in the Visit USA Shows across Australia and New Zealand provided a platform to reach out to a broad cross section of active travel agents.

Participation in the Virtuoso roadshow provided a platform to reach out to higher end agencies and educate them on the luxury products available in the USA.

Events Highlights

Launch Events

July 2013 saw trade launch events in Australia and New Zealand, with Brand USA inviting all stakeholders to hear about Brand USA Strategy and top line activity plans. The opportunity was used to invite industry to meet with the team in the coming months to discuss specific opportunities for partnership.

Industry Update

In February 2014, an industry update event was held in Sydney for Australian trade. A summary of activity since launch was provided, as well as a broad outline of strategy, upcoming activities and opportunities for partnerships.

B2B Networking Day

Brand USA partnered with Visit USA to create a full day B2B event which ran during the Visit USA roadshows to leverage the presence of U.S. suppliers in market. On February 23 we saw 65 U.S. suppliers and 25 local buyers meet and network. The day involved 39 six-minute B2B sessions and was punctuated by a BBQ lunch and some fun outdoor activities. Feedback from the day has been extremely positive:

“Thank you Brand USA for organizing such a great event. Not only were the individual sessions productive, the relaxed format of the day allowed us to build relationships and have a lot of fun doing it.” Sally McFadyen Flight Centre.



Asia-Pacific Incentives and Meetings Expo (AIME)

Brand USA created the first-ever USA pavilion at AIME, providing the opportunity for U.S. destinations, products and services to promote themselves to the incentives and meetings market. Participants included the Las Vegas Convention and Visitors Authority, California Tours, Universal Studios Hollywood, the Bellagio, Discover Los Angeles and the Santa Monica Convention & Visitors Bureau. This was the first unified USA presence at AIME and the pavilion was extremely well patronized with a large number of generated leads. Beyond those destinations present, enquiry for New Orleans and Chicago was significant. As this event evolves, Brand USA Australia & New Zealand will look to expand their presence based on the quantity of leads for specific areas.

Advisory Board

In September and October 2013 our first industry advisory board meetings took place in Australia and New Zealand. Both advisory boards included senior representatives from across the travel and media industries. The objective for the first meetings was for the board to provide up-to-date market intelligence and insights, and to assess and provide feedback on Brand USA's launch strategy in Australia and New Zealand. For the most part, the strategy was endorsed with a clear mandate that Brand USA should develop key promotional themes to allow focused promotional efforts. Feedback has been incorporated into the strategy where relevant, and the group will meet again in May to follow up.

Major League Baseball Partnership

The MLB opening series was played in Sydney between the Los Angeles Dodgers and the Arizona Diamondbacks on March 20-23, 2014. Brand USA partnered with MLB Australia over three months, including Brand USA activity at live sites, competitions leading up to the game, promotional partnerships with ESPN (the live broadcaster of MLB in Australia) and MLB brand activation.

Media Leaders Dinner

Brand USA Australia hosted a Media Leaders dinner in which key media decision makers were invited to hear an update about Brand USA's global marketing efforts and key local initiatives. In attendance were editors, producers and partnership professionals from the key Australian media and production organizations.





BRAND USA BRAZIL

Market Overview

As the travel industry looked toward 2014 in Brazil, the concern was that Brazilian travel trends would slow following the noticeable downturn in Brazil's economy. At the close of 2013, the country had missed its fiscal targets and was left with the largest deficit in its history. While unemployment had dropped by 0.2 % in the final months of 2013, it was predicted to be an uphill election year for President Dilma Rousseff.

Brazilians had taken to the streets over the summer of 2013 to protest high public spending on the 2014 FIFA World Cup™ while the government lagged on social reform. Brazil is expected to attract around 600,000 international visitors, but faces a hotel shortage and price gauging. Meanwhile, already expensive domestic flights threaten the mobility of soccer fans attempting to fly from match to match.

Several national airlines have agreed that they will not inflate their fares during the tournament, but many Brazilians are looking to leave the country during the tournament to avoid the chaos.

Despite these concerns, Brazil remains a market that is eager to travel and excited to learn about the breadth and depth of U.S. tourism destinations. According to the recent ITB World Travel Trends Report, Brazilians are driving the outbound travel growth in South America in large part due to their love of short shopping trips, but this trend is shifting as well. Middle-income consumers that may have traveled for the first five or six year ago are beginning to explore new places and types of trips, especially in Europe. The challenge in the United States is to better expose Brazilians to the diversity of opportunities available in the Land of Dreams.

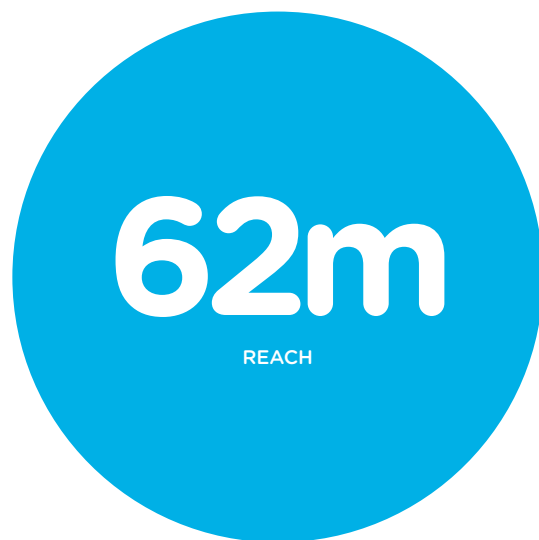
ADVERTISING HIGHLIGHTS

- Brand USA marketing has had a significant and positive impact on Brazilian arrivals and the U.S. economy.
- Between September 2012 and September 2013, Brand USA's marketing campaigns helped to increase the U.S. market share within Brazil by 3.1% against competing destinations.
- Brazil showed the largest increase out of Brand USA's eight key markets: Australia, Brazil, Canada, Germany, Japan, South Korea, Mexico and the United Kingdom.
- In Brazil alone, Brand USA recorded a 96:1 marketing return on investment following Brand USA's advertising push. The average among the key markets was 47:1.
- Based on a survey by Ipsos Travel and Leisure, more than three quarters of people who watched Brand USA's "Land of Dreams" ad on TV expressed a stronger intent to visit the U.S. than those who had not.

Media Highlights

The Brand USA Brazil team has secured a total of five media marketing partnerships, with more on the way.

- **Brasil Post (Huffington Post Brazil):** The Brand USA Brazil team secured an ongoing column focused on topics of Brand USA's choosing, including opportunities for Brazilian travellers looking to visit the U.S. The Huffington Post launched in Brazil in late-January and is the first Latin American edition of the website. The site - www.brasilpost.com.br - is being produced in partnership with the Abril Group, one of the region's leading media companies. While Brand USA will remain as the author of this column, this blog space is available to Brand USA partners. All content will be published in Portuguese. The first post was tied to the Brazil re-launch event, focusing on the importance of the Brazilian market in driving tourism to the United States and educating readers on the diverse offerings beyond the gateway cities (New York, Miami, Las Vegas).
- **Panrotas (travel trade magazine):** The team also secured an educational online quiz series for travel agents and tour operators hosted on the Panrotas website. The series will highlight an exciting travel theme or destination, such as U.S. national parks or American gastronomy. Participants will have the opportunity to win Brand USA prizes.
- **BrasilTuris Jornal (travel trade magazine):** BrasilTuris Jornal is a top travel trade in Brazil and reaches key decision makers in the travel industry. By securing a "brace" around the magazine, the team has given Brand USA partners an opportunity to highlight exciting U.S. travel destinations that are not typically visited by Brazilian travellers. For maximum impact, this promotion is accompanied by a full-page advertisement and online banner on the BrasilTuris Jornal website.
- **Mercado & Eventos (travel trade magazine):** Like our other in-market opportunities, the four-page destination insert in M&E gives Brand USA an opportunity to show off the travel opportunities available to Brazilians beyond their most popular U.S. interests - shopping and gateway destinations.
- **Brasil Travel News/Grupo Travel News (travel media group):** Leveraging the global partnership with Grupo Travel News, the Brand USA Brazil team secured a 10-minute television segment on the Brand USA Brazil re-launch event. This dynamic piece will reach more than 62 million Brazilians and will feature interviews with Brand USA representatives and the U.S. Ambassador to Brazil. The segment will capture exciting "experiential" elements of the event, such as live American music, American food and an interactive photo booth that allows attendees to insert themselves onto U.S. postcards.



Public Relations & Visiting Journalist Program

To-date, Brand USA Brazil has secured 17 pieces of earned media coverage, highlighting its presence in Brazil, as well as the findings of its ROI Report. The results in Brazil were particularly exciting, and the press responded very well to the news and the press conference that Ogilvy PR held in São Paulo on behalf of Brand USA. Most coverage thus far has been in the trade media, but Ogilvy PR is excited to make a major consumer push through upcoming press trips.

As of March 2014, earned media opportunities in Brazil have resulted in more than 750,000 earned media impressions.

- Brand Press (Discover USA): Brand USA promove EUA no Brasil
- Discover Florida Magazine: Brand USA promove EUA no Brasil
- OrlandoTV.com: Brand USA promove EUA no Brasil
- BrasilTuris: A cada um dólar gasto na campanha do Brasil, Brand USA teve retorno de US\$ 96
- Mercado & Eventos: Brand USA registra crescimento de turistas brasileiros nos EUA
- Panrotas: Campanha da Brand USA no Brasil tem retorno de 96:1
- Panrotas: Brand USA: apenas Ogilvy responde por marca no Brasil
- Mercado & Events: Brand USA Contrata Oficialmente Ogilvy PR Para Representar A Marca No Brasil
- PRWeek: Brand USA brings on Ogilvy for work in Brazil
- Mercado & Eventos: Com escritório no Brasil, Brand USA quer se aproximar do trade
- The Holmes Report: Brand USA Names Ogilvy for Brazil Assignment
- Mercado & Eventos: Brasil é mercado prioritário para Brand USA
- The Holmes Report: Account News in Brief (December 16, 2013)
- BrasilTuris: Ogilvy PR exposes its action plan in conjunction with Brand USA
- Panrotas: Ogilvy inicia trabalhos da Brand USA no Brasil
- Mercado & Eventos: Brand USA seleciona Ogilvy como representante no Brasil
- Falando de Viagem: Vamos conhecer mais os Estados Unidos?



Since launching its Brazilian Facebook page and website in April 2013, Brand USA has attracted more than 1.8 million Facebook Fans and an average of 50,000 monthly website visitors.

Travel Trade Activities

Decolar.com

Brand USA launched a partnership with Decolar.com. Since its creation in 1999, Decolar.com has become the leader in the travel and tourism market, offering lodging, airline tickets and more to travellers from Brazil. More than 2 million customers have used Decolar.com to-date, taking advantage of its unique hotel, flight and other tourism services which ensure the lowest prices and best deals. Brand USA is partnering with Decolar.com on a full marketing and communication plan to sell travel packages and promote Brand USA through 99 spots in free-to-air TV, 166 spots in paid TV, 18 print features, 21 small print offers, 288 radio spots, six Facebook posts and four digital blasts.

Brand USA Team Brazil is also working on additional media marketing opportunities with Grupo Travel News, BrasilTuris, Mercado & Eventos and Panrotas.



Agent Engagement and Activity

Brand USA Team Brazil has organized a number of events to interact directly with key travel agents and tour operators across this key market in Latin America.

BRAZTOA Tour Operator Training

BRAZTOA, the Brazilian Association of Tour Operators, partnered with Brand USA to host an in-person training session for 80 tour operators at the organization's offices in São Paulo. Association President Marco Ferraz addressed the group and in-market Ogilvy PR representative Mariana Abrantes provided attendees with an overview of destinations for Brazilian visitors. In addition, the in-market representative for the state of Texas and other Brand USA partner destinations joined Mariana to showcase the latest opportunities.

Marriott Road Show

Brand USA Brazil attended the Marriott Road Show in Porto Alegre on April 1, 2014, educating travel agents and other attendees about the U.S. as a premier travel destination for Brazilian travellers. A key objective is for Brand USA to highlight what attractions are available for Brazilians beyond the ever-popular shopping getaway, including U.S. national parks, gastronomy and more.

Brand USA Team Brazil has strong connections with all major tour operator and travel agent organizations in Brazil and has several opportunities coming down the pipeline for fam trips. Notably, in the coming weeks the team will be looking to finalize fam plans with LATAM, United Airlines and Hilton, among others. Priority trip destinations include Seattle and Washington, D.C.





Events Highlights

Brand USA ROI Report Press Conference

On February 19, 2014, Brand USA Brazil held a very successful “mini media breakfast” in São Paulo to share the results of its ROI Report. The team secured the attendance of 11 journalists and photographers from seven (7) outlets at the Tivoli hotel to learn about the direct affect that Brand USA marketing has had within Brazil and the benefits it has generated for the U.S. economy.



Brand USA Brazil “Launch” Event

On March 25, 2014, Brand USA Brazil organized a luncheon for nearly 100 travel industry professionals, U.S. destination representatives, partners and members of the press at the Jockey Club in São Paolo. The event featured U.S. Ambassador to Brazil Liliana Ayalde and Brand USA’s Alfredo Gonzalez. The Ambassador and Mr. Gonzalez both spoke about the importance of Brazil as a source of U.S. tourism and shared the “Land of Dreams” video with attendees. Guests enjoyed traditional American desserts and a country music cover band, giving the afternoon a real “USA” feel.



Panrotas Annual Forum

Brand USA participated in the Panrotas Annual Forum on April 1st and 2nd, 2014. The Panrotas Forum is a leading Brazil conference geared toward high-level executives in all sectors of the travel industry. Brand USA displayed its interactive road mapping tool and allowed attendees the chance to explore the U.S. road trip offering.

Additional Events

Brand USA has had an amplified presence at a number of exciting events throughout Brazil to-date and is scheduled to participate in a variety of industry conferences and road shows throughout the remainder of 2014, including the Visit USA Show in three Brazilian cities.



BRAND USA CHINA

Market Overview

China has soared up the rankings to #4 in terms of visitor numbers and spending in the U.S. and is projected to continue its inexorable rise to become the USA's #1 overseas source market within 5 years (2018). The China outbound forecast for 2014 is 101 million travelers, a projection the United Nations World Tourism Organization had earlier calculated would only be reached by 2020.

As a result of Brand USA's efforts, the Department of Commerce estimated that Chinese visitor numbers to the U.S. would reach 1.858 million in 2013, an increase of 26% compared to 2012 (NB: no official figure has been announced).

Media Highlights

Within 10 months of setting up the China office, Brand USA China's work was well recognized by key partners, including leading travel agencies and top media groups. The following awards were won by Brand USA China, reflecting its varied activities.

- "Most Popular Outbound Destination for Chinese Families" award from Global Times.
- "Destination of the Year" award from Travel and Leisure Magazine.
- Voted Top 10 Preferred Destination by The Travel Channel & baidu.com.
- "Leading Outbound Travel Organization" award from Top Travel Magazine.

ADVERTISING HIGHLIGHTS

The Brand USA China team worked with key travel agencies in different cities and selected the most effective media for the Welcome China Project, which aimed to generate 1,000 new Chinese travelers to the U.S. With a short lead-time of around six weeks, the project involved coordinating the travelers' itineraries culminating in New York on the night of October 8 for a gala event at the Metropolitan Museum of Art. Below are some examples of advertising generated by the China team, which formed the template used by all key travel agencies. Various media, including print, online, outdoor and major radio broadcasting, was generated.

Media

Print: Global Times; China Business News; Beijing Youth Daily; The Beijing News; Beijing Evening News; Life Style; Beijing Entertainment Messenger; Style Weekly; Southern Daily; Guangzhou Daily.

Online: Sina.com and GoUSA.cn, with reports carried pre-trip, during the trip and post-event.

Radio: Nine Beijing Radio channels and two Guangzhou radio channels over 6 weeks.

Posting Period: August/ September 2013

The Brand Awareness and Advertising Campaign was implemented in Beijing, Shanghai and Guangzhou during off-peak season, with exposure in public area LEDs in Beijing and Shanghai, display walls in major metro stations with high traffic, and major print magazines, including travel, business, life style and trend titles.



Public Relations & Visiting Journalist Program

Brand USA China Media Fam

October 2013

Brand USA China organized a print media fam for leading media to visit different cities in the U.S. It was notable for being the first media group visit from China to Utah. A wide range of experiences and each city/area's unique selling points were highlighted during the trip.

Participating Media: Travel + Leisure, Grazia, Cosmopolitan, Top Travel, Voyage **Places Visited:** Las Vegas, Universal Studio Los Angeles, Orange County, Utah, Chicago **Media Exposure:** Ongoing.

December 2013

In co-operation with Hainan Airlines, a group of selected media - website, leading tourism magazine, video website, leading portal website and major travel website - experienced a range of products from the East to West

coasts of the U.S. to promote winter travel and to introduce new itineraries to the market.

Participating Media: Sohu.com, Lotour.com, NG Traveler, Youku.com, World Traveler **Places Visited:** Chicago, Orange County, Palm Springs, Seattle **Media Exposure:** Ongoing.

February 2014

In co-operation with Hainan Airlines on new direct flights to Boston in June 2014, Brand USA organized the first media fam tour to Boston from China. Media from leading trade media, portal websites, mobile APP, magazine and KOL on blogger were invited. To encourage winter travel to different destinations, the group also visited Miami and Orlando after Boston.

Participating Media: Travel Weekly; Sina.com; Netease.com; Breadtrip.com; MOKO Magazine (also KOL as blogger).

Places Visited: Chicago, Boston, Miami, Orlando.

TRAVEL TRADE ACTIVITY

The Brand USA China team works with key partners to generate opportunities and expand media platform exposure in China. Partners include the following leading online travel agency and multi-media group.

- Ctrip.com for its publisher program starting from Spring 2014.
- World Traveler for multi-media purchasing and other tourism magazines plus possible radio programs from major cities in China starting from September 2014.



Agent Engagement and Activity

To encourage the initiatives of Chinese travel agencies to promote the U.S. and stimulate more Chinese visitor traffic, Brand USA China worked with key trade representatives in major cities on various joint promotions, including producing product brochures, fam tours, road shows and training seminars.

New U.S. Product Development

Brand USA worked with many outbound tour operators and successfully launched new U.S. itineraries with quality brochures.

Promotion of Cirque du Soleil in Beijing, Shanghai and Guangzhou

Brand USA worked with Cirque du Soleil, one of its LOA partners, to promote Cirque du Soleil's programs in Beijing and Shanghai in August 2013. The aim was to highlight live entertainment experiences in the U.S. to Chinese travelers. Sales calls and media activity were involved.

Post IMEX Trade Fam in Las Vegas

China is one of the most important MICE markets for the U.S., with various sized groups ranging from dozens to over 10 thousands. Brand USA China team worked with the IMEX organizer to have five free seats available for Chinese travel agencies for the MICE trade show in Las Vegas. In October 2013 after IMEX, Brand USA China organized an agent fam in Las Vegas. MICE promotions will generate high-end, multi visits from collaborating clients in China.

Trade Fam Tours in Co-operation with Hainan Airlines

Brand USA works closely on joint promotions with Hainan Airlines and its provision of 40 free tickets, coupled with the support of key U.S. partners that facilitated fam tours in December 2013 and February 2014. Participants were from key travel agencies in Beijing, Shanghai, Guangzhou, Hangzhou, Nanjing, Xi'an, and Chengdu. The visits encouraged the development of off-season products, new itineraries and new experiences. Itineraries included Chicago, Seattle, Orange County, Palm Springs, Boston, Miami and Orlando.

CYTS Experience Hall in Beijing

CYTS is the leading travel agency in China that focuses on high-quality tours and new products to overseas markets. The CYTS building is a landmark structure in central Beijing. Brand USA works closely on joint promotions with CYTS and the relationship has led to a significant promotional opportunity use of the Central Hall from the 17th floor to the 20th floor as a U.S. Experience Hall for six months. It is the first U.S. theme hall for consumers in China and Brand USA video and brochures are available 24 hours, 7 days a week.

Jinjiang Tours Experience Hall in Shanghai

Jinjiang is the leading travel agency in Shanghai and Brand USA images and brochures are widely displayed in its main office, showcasing the unique attractions and experiences of the U.S.

Brand USA won Jinjiang Tours "Strategic Partner of the Year" award.

Training Seminars

Intensive in-house training and seminars in major cities Beijing, Shanghai and Guangzhou; and 2nd tier cities Shenyang and Jinan, Changsha, Wuhan and Chongqing have been conducted throughout the year with over 1,800 participants. This is the most effective way to increase product knowledge, to launch new products, and to encourage quality tours.

WAY

Broadway
DEPT. OF TRANSPORTATION



Events Highlights

Welcome China Project

Brand USA China worked with the China National Tourism Administration and over 50 nationwide tour operators to promote U.S. tours during the October China National Day public holiday period.

Nearly 900 Chinese tourists gathered at the Metropolitan Museum of Art in New York on October 8 for a gala event that was the crowning glory of the promotion. The program generated new traffic from joint promotions with key travel agencies after the long China National Day holiday.

A VIP reception and media interviews were held, and KOL from China joined consumers during the trip and gala dinner. All events generated massive media coverage in both the U.S. and China.

The Welcome China event was a successful model for providing multiple outcomes such as: generating large visitor traffic in a short period; providing unique cultural experiences; collaborating with Chinese officials on consumer campaigns and promotions; increasing destination exposure in both countries; emphasizing Brand USA's leading position in the market, and generating maximum turnover for partners' investment in outbound tourism.

Media Events

Media Roundtable in Shanghai before launch of GoUSA.cn

To prepare for the August 2013 launch of new Chinese website, www.GoUSA.cn, the China team organized a media roundtable interview in Shanghai for Jiri Marousek, Brand USA's Director of Digital Marketing. The exchange provided first-hand information on the website for China's key trade media and was a great warm-up for the official launch.

Press Conference and Sales Mart in Guangzhou for Welcome China Campaign

Brand USA worked with leading travel agencies in Guangzhou to announce, in August, the Welcome China Campaign, especially to southern media. Product sales promotions were associated with the event, an effective way of signing new travelers for tours to the U.S.

Press Conference in Beijing to launch new Chinese website GoUSA.cn

The China team hosted a press conference in the U.S. Embassy in August to launch the new Chinese website and social media accounts to Chinese consumers. All key national media, U.S. partners, Chinese travel agencies and U.S. officials were among the 100 press conference attendees. The conference yielded massive media coverage in China and stimulated new traffic and potential partner co-operation for the website.

E newsletters and press release

Brand USA China publishes quarterly e-newsletters and press releases to national media and travel agencies. The publications effectively expand the influence of Brand USA in China, and also provide an additional platform for Chinese trade and media partners' information. This collateral support helps the China team generate additional editorial and new products for the U.S.

Consumer Programs

Translation of Discover America Inspiration Guide 2013 & 2014

Brand USA China team worked with the Discover America guide publisher to translate the English version in 2013 and 2014. The brochure is widely used in trade shows, consumer events, travel agency outlets, media events and all promotional activities.

Created Brand USA Chinese Map Folds

To meet the strong needs for a USA map with both English and Chinese place names, Brand USA worked with an official publishing house and offered advertising spaces at low cost to partners. This is an effective way to create another promotional platform for partners.

Support Hupu Project of GoUSA.cn and KOL Travel to U.S. Program

To communicate with key airlines, China team obtained free tickets for e-marketing promotions, which will attract more partners and build greater exposure in the digital world.



Trade Shows

COTTM 2013 in Beijing

April 2013

Brand USA had a U.S. pavilion that included U.S. partners, at this event. COTTM is one of the leading trade shows in Beijing.

China Meeting Industry Convention (CMIC)

2013 Summer Summit

June 2013

Brand USA was offered free participation at this convention which targeted MICE traffic from China. This convention allowed Brand USA to meet both corporate clients and key MICE travel agencies, and to promote the U.S. as a top MICE destination.

China International Tourism Industry Expo (CITIE)

Guangzhou

August 2013

Due to close relationship with the organizers, Brand USA had a free booth in the leading trade show in Guangzhou, which provided maximum exposure and results.



美国国家旅游局

China International Travel Mart (CITM)

October 2013

Brand USA China had a booth over 100 square meters with 10 partners in Kunming for CITM. Media interviews and meetings with travel agencies were conducted on site against the backdrop of well-displayed images and logos. Pre-show trade media editorials were arranged for Brand USA and key partners in an attempt to stimulate more visits to the U.S. pavilion.



Guangzhou International Travel Fair (GITF)

February 2014

This was the first time Brand USA took key partners from China to participate in GITF in Guangzhou. The event provided an ideal opportunity to boost the U.S. market from Southern China. Brand USA had a standard booth displaying destination images in the U.S. pavilion, which it shared with 10 partners.



BRAND USA GERMANY, AUSTRIA & SWITZERLAND

Market Overview

The German economy has gained momentum, in part due to a low unemployment rate, marked wage increases and low interest rates. Strong economic indicators, coupled with positive consumer sentiment, support private consumption and spur interest in travel. In its latest forecast, the German Institute for Economic Research predicted that the German economy is expected to accelerate in the coming year. The gross domestic product (GDP) in Germany is expected to increase by 1.7% in 2014.

Vacation and travel remains one of Germany's most popular leisure activities with the United States the leading overseas

destination. German tour operators increased their business last year, setting a revenue record of an estimated \$34.7 billion. Overall, the spending has increased by 6% in comparison to 2011. Travel bookings in the higher price categories have steadily increased in recent years.

In Germany travel agents are the most prominent sales force with 90% of core travel bookings made by agents either making recommendations or booking the trip. In 2012, 10,000 travel agencies generated more than 22.5 billion Euro in revenue.



ADVERTISING HIGHLIGHTS

Air Berlin cooperation

From September 2013 to March 2014, Brand USA ran a joint marketing campaign with Air Berlin, which included online advertisement with banners, a social media campaign, as well as TV advertisement on news channel N24 during the hourly weather report. Another part of the campaign was an out of home promotion with advertisements at airport ad spaces at TXL and DUS and tram branding in Berlin and Duesseldorf.

RTL Radio campaign

Brand USA was the destination partner of Spreeradio for their autumn travel raffle. The radio channel promoted the raffle on air combined with an advertisement campaign in Berlin newspapers and online. 100 trips to U.S. cities have been given to raffle participants and the campaign drew high attention among the audience. The raffle continued until October 3 and gave approximately 50 more U.S. trips to radio listeners. In addition, the Brand USA spot was running continuously until December.

Media Highlights

ITB Berlin News 2013

Brand USA and Cleverdis signed a Marketing Partnership Agreement for logo placement and advertorials in the brand new daily newspaper at ITB Berlin 2013 "ITB Berlin News". Each trade day, two full pages of Brand USA advertisements were included in the publication as well as a one page advertisement in the hall plan. Brand USA's logo was placed on the cover page of the magazine and the hall plan. Furthermore, four full pages of Brand USA advertorials were published in each issue. Brand USA Germany was able to include news from several USA pavilion exhibitors.



Media Breakfast 2013

"Wake Up @ USA - powered by Brand USA and Visit USA Germany Committee" was organized to provide Brand USA, VUSA members and U.S. exhibitors a platform to connect with key German-speaking media. The breakfast event was held during ITB on the trade show grounds but separate from the USA pavilion. Brand USA invited all U.S. exhibitors and Visit USA members, as well as key members of the German media.

140 journalists attended the event and were able to network and gather the latest press information. Speakers included Brand USA's CEO Christopher L. Thompson, U.S. Embassy Deputy Chief of Mission James Melville, astronaut John A. McBride from the John F. Kennedy Space Center, and Ranger Don Wollenhaupt from the National Park Service.



Public Relations & Visiting Journalist Program

Press trip September 2013

“Southern Cuisine & Whiskey”

Alabama, Tennessee, Kentucky.

In September 2013, Brand USA Germany organized a press trip to Alabama, Tennessee and Kentucky featuring the regions southern cuisine, rich history and varied music scene.

Highlights of the trip included a historical walking tour in Montgomery, Alabama; a visit to the U.S. Space and Rocket Center in Huntsville, Alabama; the Jack Daniel’s Distillery in Lynchburg, Tennessee, and the Grand Ole Opry in Nashville, Tennessee.

500,000
TOTAL CIRCULATION



TRAVEL TRADE ACTIVITY

In October, Brand USA Germany ran a joint marketing campaign with KLM Air France, which included adverts in nationwide newspapers such as Die Zeit, Frankfurter Allgemeine Zeitung, Süddeutsche Zeitung, Die Welt and Der Tagesspiegel. Further components of the campaign were 15-second spots that ran on information screens in Berlin, Hamburg, Hanover and Stuttgart. The cooperation with KLM Air France is based on an LOA agreement.



Agent Engagement and Activity

Travel Trade event in cooperation with Visit USA committee Germany

Brand USA and the Visit USA Germany Committee invited 100 travel agents to the popular “VUSA” - Very Unique Studies of America” followed by a Halloween Party on Saturday, October 26. For the second year, the event was held at the Hilton Hotel-Frankfurt Airport. Brand USA was again a sponsoring partner (with Hilton and Frankfurt Airport) and had an extensive presence with logo branding throughout the event and within all communication materials related to the seminar. In addition, Brand USA had an information table to distribute brochures and provide agents with general information on the USA. Further partners were present: Hilton Worldwide, Alamo Autovermietung, Intrepid Travel, New Orleans & Louisiana, North Carolina, FTI Touristik, Nevada, Las Vegas, Caesars Entertainment, Seattle, Oregon, Rocky Mountain International, Dertour, Icelandair, Discover New England, Illinois, Chicago, Great Lakes, Hertz Autovermietung, Air France KLM Delta, Canusa Touristik, Orlando, Sea World Parks & Entertainment, St Petersburg/Clearwater, Naples, Marco Island Everglades, The Florida Keys & Key West und Thomas Cook Touristik.



Travel Trade event in cooperation with Visit USA committee Switzerland

In January 2013, the Visit USA Switzerland seminar took place in Zurich-Regensdorf at the Moevenpick Hotel. VUSA provided Brand USA a platform to address the more than 400 travel agents at the well-established annual show. As a key sponsor, Brand USA's logo and DiscoverAmerica.com URL were prominently placed throughout the venue.





USA ROADSHOW

In cooperation with VUSA Germany, Brand USA organized a USA roadshow with four travel agent events in Dresden, Berlin, Hanover and Hamburg. Representatives from Fairbanks, Fort Myers, Colorado, Utah, Kansas, Oklahoma, Los Angeles, Naples Marco Island, New York City,

Sea World, Universal Orlando, Visit California, Hertz, Alamo and Hilton participated in the travel market and had a preview of “Highway Junkie”, the story of Dirk Rohrbach’s ride across the U.S. by bike.

Events Highlights

ITB 2013

ITB Berlin 2013 once again proved that this is the world’s pre-eminent travel trade show and leading worldwide platform for tourism policy and issues. International tourism representatives, politicians and economic leaders continue to meet at ITB and foster a positive atmosphere for continued global growth of the industry.

From March 6-10, 2013 more than 10,000 exhibitors from 188 countries participated at the show with floor space maxed out to capacity.

According to ITB Berlin organizers, exhibitors reported high quality in the level of sales discussions and an increase in the number of business transactions – 43% of the buyers came from abroad. During public visitor days on Saturday and Sunday (March 9-10) more than 60,000 consumers visited the show. For the first time in ITB history, the show was open for tour operators and travel agents to actually sell trips and packages on the site. According to a visitor survey conducted by ITB Berlin, every third consumer visiting the show intended to book a trip or make a reservation.



The total visitation number of 170,000 for ITB 2013 mirrored the 2012 visitation level; sales volume generated during the show totaled approximately EUR 6 billion, also on par from last year. ITB 2013 again generated extremely strong media interest from approximately 6,000 accredited journalists from 80 nations, as well as 250 bloggers who reported directly from the tradeshow.

Tourism Shows 2013

Brand USA attended four tourism shows in 2013.

For the first time, the USA booth at the tourism shows in Leipzig, Hamburg, Stuttgart and Munich, formerly branded by Visit USA Germany, was exclusively Brand USA branded. The ads were enlarged and printed on the middle aisle while the logo was integrated to all exhibitors' tables and communication materials. Two screens played the Land of Dreams video during the event.

According to Messe Stuttgart, 211,000 consumers visited CMT this year. An exclusively Brand USA branded booth was also implemented at the tourism shows Reisen Hamburg and f.re.e Munich.

Reisen Hamburg attracted a record breaking 75,000 visitors in 2013 during the five consumer show days. Reisen Hamburg is the largest tourism show in the Northern part of Germany with a focus on segments tourism, caravanning, outdoor and biking. About 600 exhibitors from all over the world participated to showcase their newest attractions and offers. There were a total of 13 exhibitors on the Pavilion, and a further 11 VUSA members had their materials distributed at the booth.

F.re.e Munich attracted a total of 110,00 visitors. There were a total of 14 exhibitors at the booth, and a further 9 VUSA members had their materials distributed at the booth.

Total amount of visitors: 500,000

Taste of the USA event 2013

The Brand USA "Taste of the USA" event was organized with the aim of offering all U.S. exhibitors a platform to present their local culinary specialties directly to German-speaking key accounts and media during a unified USA event.

A total of 17 co-exhibitors participated with food and beverage contributions supporting Brand USA with a variety of typical American delicacies. Highlights of the evening were the welcome speeches by U.S. Ambassador Philip D. Murphy and Brand USA President & CEO Christopher L. Thompson. Murphy and Thompson both stressed the positive growth numbers of international arrivals to the U.S. and thanked the many exhibitors at ITB for their efforts.

Key Account Luncheon

For the first time, Brand USA hosted a VIP Lunch at Funkturm Restaurant located at ITB. All key German and Swiss accounts that have supported Brand USA in the past and with whom Brand USA anticipates to work with in the future were invited to this unique setting. A total of 42 invited guests (key tour operator, media, airline representatives) and 10 Brand USA hosts participated.

IMEX 2013

From May 21-23, Brand USA Germany attended IMEX Frankfurt, the worldwide exhibition for incentive travel, meetings and events. The Brand USA booth was situated centrally in the USA section and served as a venue for meetings, and a basis for guests to receive general information about the U.S. as a travel destination. 2013 IMEX Frankfurt registered more than 3,500 exhibitors from 150 countries.

The Brand USA Germany, Austria & Switzerland team had meetings with hosted buyers from various countries. Participating U.S. destinations included Chicago, Visit Florida, Massachusetts, Tucson, Scottsdale, Texas, Tennessee, Las Vegas and New York City. Private industry / DMC exhibitors included Lizard and EastWest Travel GmbH.

Independence Day events

Brand USA supported the U.S. Embassy in Berlin and the consulates in Frankfurt, Munich, Hamburg, Dusseldorf and Leipzig as a sponsor of the Independence Day celebrations taking place between July 3-5. Brand USA was also present in Cologne with Amerika Haus NRW. Spokespersons from the Embassy and the various consular offices introduced Brand USA and explained the organization's mission and activities. The overall feedback was unanimously positive and the Embassy and Consulates highly appreciated Brand USA's participation and presence.





BRAND USA INDIA

Market Overview

India is amongst the fastest growing economies worldwide. There are 50 million passport holders in the country and expected to reach up to 100 million in next 10 years. The current outbound market is estimated at 15 million outbound travelers.

The changing profile of the Indian traveler now focuses on “experiences,” including musical concerts, designers and local fashion etc. Customized & FIT Travel is showing the highest growth with a growing demand for niche products – off the beaten track locations, outdoors and other unique visits and activities. Average length of holiday is getting longer for long haul destinations; as they travel with families, and have high repeat visitation rate to preferred destinations. Indians also prefer multi destinations/ locations during their holidays [Source: PATA].

The Internet is the primary source of information followed by newspapers/magazines, travel agencies, recommendations from friends & TV. There is a surge in mobile internet users – pegged to cross 130 million by March 2014 witnessing an encouraging quarter on quarter growth. [Source: IAMA] Increase in airline capacity from India to the USA via several hubs specially the Gulf Carriers like Qatar Airways, Emirates Airlines & Etihad Airlines offers several options to the Indian traveler.

Arrivals into the USA - In 2012, 724,443 Indians visited the United States. India was ranked 12th in visitor arrivals increase of 9.2% over 2011. The recent figures for Indian tourist arrivals from January- June 2013 rank India 11th with 451,230 arrivals. An increase of 17.9% via our educational & travel trade engagement programs along with fam trips our aim is to reach all aspects of the marketplace and heavily influence the decision-making process in terms of choosing a holiday.

ADVERTISING HIGHLIGHTS

Qatar Airways

Beginning July 2013, Brand USA India signed a Marketing Partnership Agreement with Qatar Airways to promote the Qatar Airways online destinations of Chicago, Houston, New York, Washington, Miami and Dallas, and various offline destinations in the USA. The advertising and communication campaign included consumer, mainline and business dailies; internet advertising; radio advertising; OOH.

Another part of this campaign were two familiarization trips to Houston and Washington, covering 16 tickets for the decision makers/owners of top agencies and press release coverage in leading magazines, newspaper and news and travel websites creating awareness of the qatar airways and brand usa tie-up joint tactical co-ops with tour operators beginning January throughout April 2014. Brand USA India partnered with 8 tour operators with national and regional outreach in a joint co-op tactical consumer advertising. This included consumer mainline and business dailies such as Times of India, Hindustan Times, Economic Times, Mint Lounge. The objective is to highlight the destination and its offering to potential visitors – creating demand and awareness and to ensure the availability of the product.

Trade Press Advertising

Brand USA India advertised with 13 major travel trade publications such as Travel Trade Journal, Travel Trends Today and Travel Biz Monitor with a combined circulation of 455,000 copies during the Brand USA India Mission and SATTE 2014.

Media Highlights

Marketing Partnership Agreements with Media Houses

Hindustan Times

- Daily newspaper circulated pan India
- According to the Indian readership survey 2010, HT is the second most widely read English Daily in India after the Times of India
- Circulation - 3.6 million daily
- Readership - 3.8 million daily

Times of India

- Amongst the largest circulated English Daily in India
- Circulation - 4 million
- Readership - 7.6 million

CNN IBN Network 18

- Channel has been awarded all the prestigious awards in the general news category in the country
- Viewership of 20 million viewers per month



Public Relations & Visiting Journalist Program

Public Relations

Media Coverage Analysis

Total number of clippings – 274 (June 2013 - January 2014)

Break up as follows:

- Consumer Publications – 86
 - Newspaper – 38
 - Consumer – 48
- Trade – 50
- Online – 137
- Broadcast – 1

Total Circulation – 18 million

Total Readership – 48 million

Total Monthly hits – 140 million

Broadcast – 7,500,000

Press Releases

- “Brand USA expands international network” to travel trade and online media
- Brand USA India Mission (Pre and Post) to various travel, trade and online media

Visiting Journalist Program (VJP)

Media Fam Trip

Jan 22-28, 2014

5 journalists & Brand USA, India team member

- Ms. Seema Khinnavar, JetWings
- Mr. Zabeeh Afaque, Hindustan Times
- Ms. Jacqueline Pinto, The New Indian Express
- Ms. Preeti Verma, Freelance Travel Writer
- Ms. Sonia Nazareth, FreelanceTravel Writer

3 Cities

- Washington, D.C.
- Philadelphia
- Boston

ROI

- Clippings achieved till date - 6 consumer publications
- Ad Expected Over 15 Clippings
- Expected Coverage + US \$ 1 million
- Expected Readers + 10 million

Agent Engagement and Activity

Ongoing Engagement Programs

Brand USA 'Discover America' Monthly e-newsletters

- Circulated 7 newsletters from August '13 - Feb '14
- Reach to over 6000 travel agents monthly
- Regular Sales Calls to major travel agents/tour operators

Embassy of USA, Public Affairs & the American Center : USA DESTINATION 2014

July 29, 2013

- City - Jaipur (Tier II)
- Travel Agents/Tour Operators trained + 50 Agents
- Partnership with InterGlobe Technology Quotient - GDS (Galileo)

Contest for Travel Trade

December 2013 - January 2014

- Generated over 700 entries in 5 weeks
- Outreach to a database of over 6000 agents pan India

Brand USA 'DiscoverAmerica' Educational Seminars

December 2013 - February 2014

Total Cities - 9

Covered till February'14- 3 cities rest to be covered to April '14

Partners that participated :

- New York & Co
- Philadelphia Convention & Visitors Bureau
- San Francisco Travel Association
- Las Vegas Convention & Visitors Authority
- Qatar Airways
- Alamo- Rent A Car
- Visit California

Over 300 Travel Agents & Tour Operators Trained to date.

Brand USA & Nevada Commission on Tourism VIP Networking Dinner

January 30, 2014

Over 100 senior management from travel companies, airlines, Embassy of United States of America & U.S. Commercial Services attended.





Qatar Airways workshop for Miami/Dallas Flight Launch in 9 Cities

February 2014

- Mumbai
- New Delhi
- Bangalore
- Chennai
- Ahmadabad
- Hyderabad

Over 300 tour operators & travel agents trained on the destinations of Miami and Dallas.

Brand USA 'Experience America' 2014 - Engagement & Networking event in Mumbai for Travel Trade

February 26, 2014

Attended by over 170 senior management from travel companies, airlines and U.S. Consulate, Mumbai & Media.

Objective

To create an evening of entertaining and memorable experiences for the attendees, designed to bring to life the states and cities of the U.S.

To engage and educate guests with culture, music and fun on the variety and diversity of experiences the U.S. offers. To involve partners to showcase their product to the very senior professionals from travel trade and airlines.

The format had three parts: Entrance, Education, Networking:

- **Entrance** - Involved a red carpet walk away branded in partner imagery and logos
- **Education** - Two rounds of quizzes on partners to engage and educate the attendees
- **Networking** - Over cocktails, music and dinner

Partners that participated

- Alamo-Rent A Car
- Visit California
- Philadelphia Convention & Visitors Bureau

Results

The Interactive round of quiz created a very engaging environment.

The attendees absorbed the information which will be used to promote U.S. destinations. The feedback for the evening was very encouraging and extremely positive.

Emirates workshop for the travel trade- Launch of the Boston Route

March 2014 onwards

Cities

- New Delhi (Tier I)
- Chennai (Tier I)
- Mumbai (Tier I)

Events Highlights

BRAND USA INDIA MISSION 2013

September 22- 27, 2013

- Cities - Mumbai & New Delhi
- Events - 6 events; 47 Delegates from USA
- Total travel agents/tour operators targeted over 700
- B2B Table Top Trade Shows
- Mumbai - September 23, 2013
- New Delhi - September 25, 2013
- +550 tour operators & travel agents trained
- VIP Networking Dinners
- Mumbai- September 23, 2013 & New Delhi- September 25, 2013
- Networked with over 200 senior management from tour operators & travel agents, airlines, Embassy of USA & U.S. Commercial Services
- Media Interaction
- New Delhi - September 26, 2013
- Attended by over 55 media

Participation with Embassy of USA, U.S. Commercial Services in NAFTA (North American Free Trade Agreement) Event

November 22, 2013

- Event attended by over 600 guests
- Brand USA 'Thanksgiving Dinner' in 2 cities
- Period - November 27 & 29, 2013
- Venue - New Delhi & Mumbai
- Networked with 30 Senior Media from lifestyle, consumer, business & travel trade publications

Qatar Airways- MICE Workshop for Corporate Decision Markers in Mumbai

December 12, 2013

- Networked with 30 corporate decision makers

SATTE 2014

January 29-31, 2014

- Brand USA pavilion inaugurated by Her Excellency, Ms. Nancy Powell, Ambassador of United States of America
- Networked with over 450 travel agents & tour operators
- A total of 7 partners participated at our pavilion:
 - Alamo Rent-a-car
 - Best Western Global Marketing Group
 - Fairmont Resorts and Hotels India
 - Las Vegas Convention and Visitors Authority
 - Nevada Commission on Tourism
 - Caesars Entertainment
 - Team America Receptive Tour Operators
 - Tours Limited
 - Visit Florida
 - Sea World Parks and Entertainment
 - Walt Disney World Greater
 - Miami Conventions and Visitors Bureau
 - Universal Parks and Resorts





BRAND USA JAPAN

Market Overview

Japanese visitors remain the United States' top spending overseas visitor group, and the 2nd largest source of overseas visitors. According to NTT forecasts, Japan is projected to surpass the UK to become the #1 overseas source of visitors in 2013.

ADVERTISING HIGHLIGHTS

Brand USA Japan handled media planning and buying for travel trade publications in FY13, and negotiated free editorial coverage in the leading travel publications.

Travel Journal: In addition to Brand USA advertising, this leading travel trade publication ran a 6-installment editorial series on the U.S. called "America Report" (2 page earned media editorial per 1 page ad placement x 6 times)

Wing Travel: Secured 1 full page of earned editorial per 1 page ad placement plus a Brand USA dedicated special edition to be published at the same time as the JATA travel trade show, Japan's leading travel fair.



Media Highlights

Brand USA Japan negotiated and developed high-impact media partnerships with influential media outlets that have strong reach among potential Japanese visitors to the U.S.

United Airlines' Japanese In-flight Magazine

Brand USA Japan developed a series of three 4-page Discover America food and destination features for the Japanese version of United Airlines' in-flight magazine "LEADER'S REVIEW".

In each feature, famous Japanese celebrity guests including leading Japanese food critics visited restaurants in New York, Chicago and Las Vegas to sample the local cuisine as well as unique features of each destination.

The magazine was distributed in over 1 million seat back pockets and sent to Japan Mileage Plus members via mail on three occasions.



Tabi (Travel) Channel

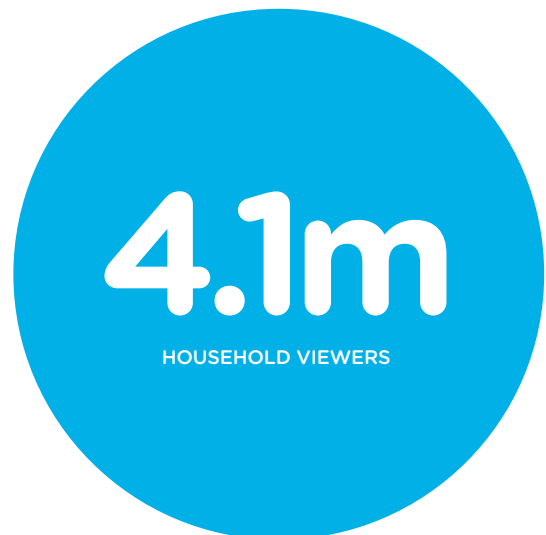
Tabi (Travel) Channel is the only travel content channel available via cable and satellite television networks in Japan and has a reach of over 4.1 million household viewers with a median age between 35 and 55.

Tabi Channel is operated by Time Warner (Japan) which controls over 50 channels including HBO, CNN, Cartoon Network and New Line Cinema.

Brand USA Japan, working with the Travel Channel, developed a "Let's Go to the U.S." sweepstakes advertising campaign, to encourage travel to the U.S. Airing on the Tabi (Travel) Channel and Cartoon Network, the campaign offered space as in-kind to run Brand USA advertising.

Time Warner created a dedicated campaign website with links to DiscoverAmerica.com and a promotional movie to introduce the U.S. as a world-class travel destination. The campaign focused on the Brand USA tagline "Discover this land like never before".

Viewers were asked to visit the campaign website and fill in the phrase "Discover this land like..." for a chance to win 2 pairs of round-trip airline tickets to the U.S.



Public Relations & Visiting Journalist Program

To generate earned media coverage of the U.S. from the tourism angle on Brand USA's initiative, Brand USA Japan carried out a variety of nationwide PR programs, developing extensive unpaid media exposure for the U.S. in key media channels in Japan.

BS Fuji

Brand USA worked with BS Fuji, a leading satellite TV network and subsidiary of Fuji Media, Japan's most powerful media group, to create a TV series, titled "Wonderful America." The series promoted the U.S. via six 25-minute episodes each with an advertising value \$750,000, generating \$4.5 million in earned media coverage, with 39.71 million households (73.3% of all households in Japan) subscribing to BS Fuji.

Each episode focused on a "beyond the gateway" destination to introduce Japanese travelers to relatively unknown states such as: Maine, Virginia, South Dakota, New Mexico, Louisiana and Florida.

Episodes aired once a week with re-broadcast the following week to reach over 450,000 Japanese viewers per episode.

"Wonderful America" was hosted by a female reporter who visited each destination and provided powerful personal impressions from a uniquely Japanese perspective.

"Wonderful America" was also broadcast on JAL's inflight entertainment system on select flights for a month reaching 150,000 Japanese domestic travelers who are key high-value targets for Brand USA in the Japanese market.

WORLD BASEBALL CLASSIC

Brand USA Japan launched a series of PR programs based on Brand USA's global sponsorship of the World Baseball Classic (WBC) to capitalize on Bobby Valentine's celebrity status and appointment as Brand USA Ambassador to Japan for the event.

- Organized major press conferences in Tokyo and Fukuoka.
- Negotiated with key media targeting both nationwide and Fukuoka-based media outlets.
- Organized major joint campaign at the MLB Café in Tokyo.

The above efforts resulted in media coverage in a total of 36 newspapers across Japan and on 2 television networks.

Coverage included a major feature on NHK, Japan's national public broadcasting organization and the nation's most prestigious TV network. Exposure was secured on NHK's prime time news, with a feature on his charity work in Japan, as well as his visit to Asahi City in Chiba prefecture as Brand USA Ambassador. Over 200 residents were living in temporary housing in Asahi City due to the tsunami that struck northern Japan on March 11th, 2011.



Agent Engagement and Activity

In September 2012, Brand USA and the Japan Association of Travel Agents (JATA) launched the “Japan-U.S.A. Tourism Exchange Year.” This served as the key co-op platform with all major Japanese travel agencies. JATA is the official industry organization of all Japanese travel agencies, and this nationwide initiative was designed to motivate all Japanese travel agencies to invest heavily in the marketing of U.S. tour products in 2012-13. In corporation with JATA, Brand USA planned and launched a wide range of marketing initiatives, grouped into the following 7 key activity areas:

- Create and enhance awareness of “Japan-U.S. Tourism Exchange Year” among Japanese travel trade and consumers
- Launch/enhance educational programs targeting Japanese tour operators to boost the number of “U.S fans” within the Japanese trade
- Launch major joint B-to-B promotions to encourage Japanese travel wholesalers to create new U.S. travel tour packages
- Stimulate travel demand between “Sister Cities” in Japan and the U.S.
- Develop joint promotions to support the launch of new air services from Japan to the U.S.
- Increase the number of Japanese and U.S. participants and exhibitors at JATA Tourism Forum & Travel Showcase and IPW
- Continuously enhance relationships between the Japanese and U.S. travel industry via regular high-level meetings

Sample programs under the Japan-US Tourism Exchange Year are as follows:

“Deeply Discover America” seminars

As one of the key educational programs under the “U.S.-Japan Tourism Exchange Year”, Brand USA and JATA conducted a series of theme-based educational seminars targeting key Japanese tour operators, titled “Deeply Discover America Seminars”. The program’s objective has been to provide more in-depth information, than simple destination information to Japanese tour operators, as Japan is a more mature market, and to provide multiple-state information beyond-the- gateways under the Brand USA umbrella.

The first “Deeply Discover America Seminar” launched in Tokyo in January 2013, and was followed by 130 major seminars throughout the year in key secondary markets of Osaka, Nagoya, Sapporo, Sendai and Fukuoka. A total of 130 separate training sessions were conducted, and a total of 29 U.S. tourism boards participated.

Seminar themes included Nature, MICE, Museums & Culture, Sports, Fly & Drive, Theme Parks, Shopping, Entertainment – Movies & Music and Food & Wine. Brand USA Japan extended invitations to various DMOs and travel suppliers to participate in the seminars.

More than 400 travel agents across the country participated in the “Deeply Discover America Seminars” during 2013.

“Tour of America” Contest

Another major element of the “U.S.-Japan Tourism Exchange Year” initiative was the “Tour of America Contest.” In partnership with JATA, Brand USA Japan created a special “Tour of America” category at the “JATA Tour Grand Prix”, and encouraged all Japanese tour operators to produce new and unique U.S. package tours.

The Tour Grand Prix award, sponsored by Japan’s Ministry of Land, Infrastructure, Transport and Tourism, selects the best tour of the year at JATA Travel Showcase every year. There are ten different tour categories nominated and the winner was a unique “Cross the U.S. Continent in 15 days by train and bus” tour package that was developed by Hankyu Travel International. The same tour also won the Grand Prize in the category of “Japan- U.S Tourism Exchange Year Award”.

The new tour package designer, Mr. Shinichi Morishita of Hankyu, is also a member of USTP10, the educational program sponsored by Visit USA Committee Japan and Brand USA.

Jay Gray, Brand USA Vice President of Global Market Development, presented the award to Mr. Morishita during an award ceremony at the JATA Travel Showcase 2013.

JATA Destination Specialist – Online Training Program

A core new educational program launched as part of the “U.S. - Japan Tourism Exchange Year.” The new program features enhanced online training modules for the U.S., with new content and new promotions to encourage more travel agents throughout Japan to participate in the U.S. destination training program.

The expanded JATA Destination Specialist Program for travel agents now consists of a series of online U.S. destination seminars and a graduation test covering 22 of the most popular destinations visited by Japanese travelers, including the U.S. mainland, Hawaii, Guam and the Mariana Islands.

The test costs \$200 per travel agent and after passing the test, Japanese travel agents become a “U.S. Destination Specialist” and receive a certificate that can be displayed in their travel agency and used in their sales promotions.

USTP10 (U.S. Travel Professionals): Brand USA Advisory Board

“The USTP (U.S. Travel Professional) 10” program was originally initiated by the Visit USA Committee Japan, with 10 key U.S. product planners from eight leading Japanese tour operators chosen to attend monthly training sessions and meetings to discuss various U.S. tourism issues over the next 10 months. These selected members are then assigned by their companies to share knowledge about the U.S. within their companies and with key tour planners, frontline agents and other key divisions.

Brand USA became a sponsor of these monthly meetings, and appointed the members to the “Brand USA Advisory Board” in order to receive feedback and comments on Brand USA’s programs in Japan.

With the success of the above “Japan-U.S.A. Tourism Exchange Year” which ended after September 2013, Brand USA and JATA have now agreed to extend the campaign for another year, changing its name to the “Discover America Project.” Phase 2 of nationwide marketing programs was also launched with coordination from the Japan Association of Travel Agents, targeting all major Japanese travel agencies nationwide from October 2013.

Events Highlights

Brand USA worked extensively in a wide range of travel trade and consumer shows throughout Japan, showcasing U.S. travel products to key Japanese tour operators and consumers, and working to develop face-to-face business opportunities for U.S. travel suppliers to meet directly with Japanese travel representatives.

Regional Travel Trade Consumer Shows

Brand USA proactively attended a series of travel consumer and trade shows across Japan. Brand USA Japan extended invitations to more than 25 representative offices of various U.S. state and city tourism offices in Japan, and coordinated U.S. participation and brochure distribution at the following shows:

March, 2013	Niigata Airport Travel Fair
March, 2013	Nagoya Travel Festival
May, 2013	Kansai Airport Tabihaku Travel Fair
October, 2013	Sapporo Travel Fair
October, 2013	Sendai Travel Fair 2013
January, 2014	Hiroshima Sora-tabi overseas travel fair



JATA Travel Showcase

Brand USA organized the “Brand USA pavilion” at the largest travel trade/consumer show in Japan, the JATA Travel showcase, which took place September 13 - 15. The show featured over 1,350 exhibition booths from 154 countries and regions and attracted more than 131,000 Japanese visitors to the three-day event, the most attendees in its history and a 4% increase from last year.

The Brand USA pavilion consisted of 88 booths in 2013, a significantly larger presence than the 72 booths hosted in 2012, and making the U.S. the largest exhibitor nation at the show for the first time in its history. To enhance business to business opportunities for exhibitors from the U.S., Brand USA planned and organized a series of related events during the show as follows:

Discover America VIP Reception (September 12, 2013)

Brand USA held a Discover America VIP Reception at the U.S. ambassador to Japan’s residence on the evening of September 12. Approximately 50 VIPs from Japan’s travel industry and 80 show exhibitors were in attendance.

One on One appointments session (September 13, 2013)

Brand USA Japan organized “one-on-one appointment business sessions” at the Brand USA pavilion on September 13, inviting all key travel agents in attendance. It was the first time for this type of appointment session for Brand USA Japan, and a total of 42 travel agents made appointments with participating U.S. exhibitors.

There were seven sessions held in total and every session was 20 minutes long with a 10-minute break, with most of the Japanese travel agents each attending seven sessions throughout the day.

Discover America Happy Hour Reception (September 13, 2013)

Following the one-on-one appointment sessions, Brand USA held the Discover America Happy Hour Reception at the Brand USA Pavilion on the evening of September 13. More than 200 visitors attended, and Mr. Gray from Brand USA and Mr. Kosugi from the Visit USA Japan Committee made remarks while Mr. Tagawa, Vice Chairman of JATA gave a toast.

BRAND USA MEXICO & CENTRAL AMERICA

The Brand USA Mexico and Central America office opened in November 2013. Since then, the team has developed different programs to promote the United States as a premier travel destination for travelers from Mexico and Central America (Guatemala, Honduras, El Salvador, Costa Rica and Panama). The population of these seven countries exceeds 160 million and represents great opportunity for Brand USA. With the support of media and industry partners, 2014 will be a great year for Brand USA in the region.

Market Overview

Mexico remains the second largest tourist-generating country to the USA after Canada, and the country with the fourth largest spending per trip to the U.S., behind only Canada, Japan, and the UK. Almost 60% of the Mexican travelers prefer U.S. cities. In Central America, Costa Rica, Guatemala and Panama remain the most important markets. Panama has become a natural hub for the South American region, taking into account the recent dynamism of connecting flights with regional airlines.

80% of travelers coming from Mexico and Central America visit the USA for leisure with shopping and dining as their preferred activities. Consumer habits for the region have changed over the last years, turning the final consumer into a more informed one, searching for better prices and services with a new VIP experience (high-end destination).

Mexican outbound travel to the United States increased by 6.2% through September 2012. Current estimates indicate that visits to the U.S. grew (+4.3%) during 2012, and are expected to have increased by 4.4% in 2013 and 3.9% in 2014. This growth is largely attributed to Mexico's growing economy that is expected to have grown 3.6% in 2013 and grow by 3.9% in 2014.

Media Highlights

Co-op programs have turned into a highly effective tool to multiply budget resources in the tourism sector. It is a common practice to use co-op programs in the Latin American markets, particularly in Mexico and Central America. Therefore, this instrument become a core tool in multiplying resources, generating synergies and coordinating efforts among the different strategic allies who will work to advocate for U.S. destinations.

Brand USA Mexico and Central America will negotiate and execute a year-long intensive program for media co-ops in the region, focusing mainly on Mexico, Panama and Costa Rica as primary markets; and Honduras and Guatemala as secondary markets.

Televisa Publishing

Brand USA is working on a major editorial proposal with Televisa Publishing, the largest media company in the Spanish-speaking world and a major participant in the international entertainment business. Present in 20 countries, Televisa Publishing distributes over 100 titles (Cosmopolitan, Esquire, Harper's Bazaar, Marie Claire, National Geographic Traveler and Men's Health, among others) and reaches over 34.7 million readers across the Spanish-speaking Americas. This partnership will focus on Brand USA's four experience pillars through advertising pages, editorial content and digital presence to promote this land like never before.



Public Relations & Visiting Journalist Program

Public Relations

In order to continue positioning the U.S. as one of the most desirable destinations, Brand USA Mexico will work closely with trade and consumer media in the region.

The focus for trade media will be to highlight in-market initiatives and communicate available resources. In consumer media, Brand USA will focus on highlighting the four experience pillars.

Visiting Journalist Program

Brand USA is assembling individual and group requests in order to promote the USA as a premier travel destination. Highlights to date include a major project with Destinos TV, a TV channel specialized in tourism that reaches 25 million homes through the American continent. Brand USA plans to partner with Destinos TV to create a full episode dedicated to the vineyards of California, Oregon and Washington. Other PR activities to be accomplished during 2014 are media missions and live broadcasts.



Travel Trade Activities

Brand USA has selected Gran Plan, Aeromexico's tour operator as its main partnership sponsor for its in-country multichannel campaign. Starting in March 2014, Gran Plan and Brand USA will develop a landing page to upload special offers to U.S. destinations. The partnership will include print materials and email blasts to consumers.



Agent Engagement

To engage travel agents in the Mexican and Central American markets, Brand USA Mexico is working on a series of co-op programs with the trade to stimulate travel demand to the U.S. and has been participating in specialized seminars.

In March 2014, Brand USA attended Expo Mayoristas, the most important trade show in Mexico held in Mexico City, Guadalajara, Monterrey, Merida and Leon. Brand USA reached out to over a thousand travel agents and invited them to visit Discoveramerica.com to get information on U.S. destinations. The team also promoted the Trip Tuner feature on the website, which has been a big hit in Latin America since the beginning.



Events Highlights

Before opening the official office in Mexico, Brand USA had already been engaging with partners in Mexico and Central America, especially after IPW 2013. In August of 2013, Brand USA attended both the Visit USA shows in Costa Rica and in Guatemala. During these trips, Brand USA gained exposure with not only the trade, but also with direct consumers. In addition, Brand USA had very fruitful meetings with embassy staff in both countries.

In September of 2013, Brand USA attended Fita in Mexico City. This show was particularly important for Brand USA as it was the first time the USA had participated in Fita as the guest country. Alfredo Gonzalez, Sr. VP of Global Market Development, participated in the ribbon cutting for the opening of the Brand USA Pavilion. The show had more than two thousand exhibitors representing almost 800 businesses, and more than 12 thousand professionals representing 45 countries.

During October of 2013, Brand USA participated in ILTM Americas. The International Luxury Travel Market (ILTM) is an event that focuses on luxury travel. Jay Gray, VP of Global Market Developments, discussed the importance of the Latin American luxury traveler to the United States, and Brand USA's future plans for the Latin American market.

On January 21st, 2014 Brand USA Mexico held its kick-off event featuring Alfredo Gonzalez, Sr. VP of Global Market Development for Brand USA; Benjamin Diaz, President for Brand USA Mexico and Central America; and Adriana de la Torre, PR Vice President for Mexico and Central America. During this event, the team presented a regional overview, its marketing plan, and the benefits of working with Brand USA.

On March 7th-9th, 2014, Brand USA attended Expoviajes Costa Rica, one of the major regional consumer shows. About 4,000 people went to the two day event and learned of the Spanish website www.discoveramerica.mx and, again, the team promoted the Trip Tuner.







Hey Cupcake!

BRAND USA SOUTH KOREA

Market Overview

Korea is the ninth largest market to the U.S. in terms of visitation. The Korean market has seen steady growth since the implementation of the visa waiver program in 2009. Brand USA Korea's goal is to increase Korean visitation to the U.S. by positioning it as a desirable holiday destination to the local population.

The following are primary objectives for the Korean market:

- Stimulate demand for travel to the United States in Korea.
- Create and design trade and media co-op programs that U.S. travel suppliers can buy into and use to market themselves more effectively in Korea.
- Carryout nationwide PR programs to enhance the image of the U.S. and to help position it as a world-class, must-visit leisure and incentive destination.
- Communicate the mission/role of Brand USA to key stakeholders in Korea and maintain close working relationships with all stakeholders. Additionally, create and organize effective promotion and co-op opportunities for stakeholders that are unable to do so themselves.
- Identify and generate co-op programs that drive results for both stakeholders and trade and media partners.

ADVERTISING HIGHLIGHTS

The Brand USA advertising campaign in Korea was launched in October 2013. The first ad campaign saw the placement of "Land of Dream" ads on TV, OOH displays and travel trade media publications to generate more interest in the U.S. Brand USA Korea teamed up with Publisher Program partners in Korea (Hana Tour and Interpark Tour) on all digital ad placements.

The digital ad campaign resulted in 209,563,312 impressions and 164,758 clicks. With the call-to-action linked to Hana Tour and Interpark Tour, the campaign drove a 60% increase in bookings of U.S. tours products in both companies.



60%

BOOKING INCREASE

Media Highlights

Asiana Airlines Inflight Program

Brand USA Korea and TRIAD IBS (Asiana Airline's In-flight Broadcasting System) conducted a co-op ad campaign targeting Asiana Airlines' in-flight video & magazine. Approximately 1.2 million Asiana Airlines passengers were exposed to the Brand USA ads.

Campaign Result:

- Secured five-second "Air Show" ad space on Asiana In-flight entertainment program for three months.
- 30-second Brand USA ads played before CNN, KBS, MBC, and SBS news clips and a 1-page print ad on the back cover of Asiana In-flight Magazine for three-months.



AB-ROAD Magazine

Brand USA Korea developed a media partnership with AB-ROAD, one of Korea's major travel magazines.

Campaign Result:

- 48 pages of supplements featuring major U.S. destinations (California, Nevada, New York, Texas, Boston, Chicago, Detroit, Hawaii, Guam, and Saipan) were produced.
- The same U.S.-themed content was also featured in the JeJu Air's in-flight magazine, a special banner was placed on the main page of AB-ROAD's website, and in relevant iTunes and Android apps.



Public Relations & Visiting Journalist Program

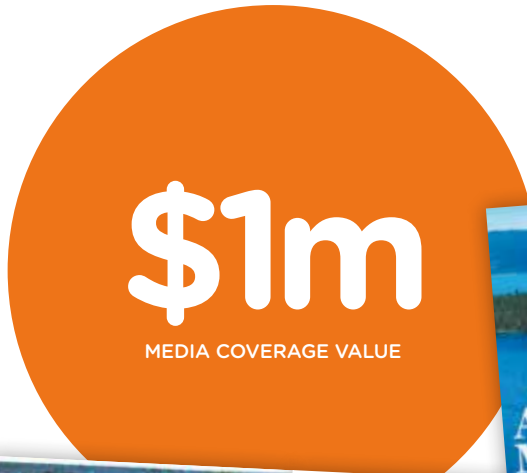
PR and Media Relations

In order to raise awareness and position the U.S. as a premier travel destination, as well as communicate Brand USA's initiative, Brand USA Korea proactively communicated with Korean media through media relations.

Visiting Journalist Programs

To showcase the U.S. as a desirable holiday destination, Brand USA Korea invited key Korean media on a fam tour to provide first-hand experience of the U.S.

- Chosun Ilbo Newspaper
- Travie Magazine
- AB-ROAD Magazine
- Lonely Planet Magazine
- Traveler Magazine



Travel Trade Activities

Travel agencies play a key role in the Korean leisure travel market. Brand USA Korea is aggressively working with Korean and U.S. partners, especially airline partners, to enhance the industry's knowledge of the United States as a premier travel destination. Outreach includes a series of trade familiarization tours as well as a variety of trade promotions.

Marketing Partnership with United Airlines

Brand USA Korea and United Airlines partnered for a series of U.S. trade fairs and media and consumer promotions. Through co-promotion, Brand USA Korea successfully acquired air tickets to support these initiatives. Brand USA Korea plans to continue its partnership with United Airlines through 2014.

Marketing Partnership with Hawaiian Airlines

Brand USA Korea developed a partnership with Hawaiian Airlines to promote Hawaii and tour products that combine Hawaii and mainland USA. Through this partnership, Brand USA Korea and Hawaiian Airlines plan to hold trade fairs with travel agents in the Seoul and Busan regions, as well as additional trade promotions.

Marketing Partnership with Asiana Airlines

Brand USA Korea partnered with Asiana Airlines—which has direct flights to seven major cities in the USA (Seattle, San Francisco, Los Angeles, Chicago, New York, Hawaii and Saipan) for a series of travel agent fairs. Working with Asiana Airlines, Brand USA Korea plans to hold U.S. trade product sales contests and other trade promotions.

Marketing Partnership with Singapore Airlines

Brand USA Korea and Singapore Airlines will co-op on a celebrity magazine shoot, travel agent fair and MICE fair to promote the U.S.

Marketing Partnership with Delta Air Lines

Delta Air Lines will be launching its second direct flight from Incheon in June 2014. Brand USA Korea and Delta Air Lines will co-op on a series of trade fairs, travel agent sales promotions and launch events to promote the new Seattle route as well other U.S. destinations.

LOA Partner Highlights

Brand USA Korea worked with golf specialist agent ES Tour to sign a LOA partnership to place co-op ads on SBS Golf Channel.

Agent Engagement and Activity

Discover America Seminars

To educate the Korean travel trade, Brand USA Korea held a series of U.S., “Discover America” seminars in Seoul and Busan. The seminars are designed to showcase U.S. stakeholders and DMOs while educating and develop networking opportunities with Korea travel agents. Nearly 30 U.S. suppliers participated and more than 400 Korean travel trade and media attended the seminars. Feedback from both suppliers and travel agents were very positive. In 2013, Brand USA held four seminars in Korea. Brand USA Korea will continue to play a role in bringing U.S. stakeholders together to train the Korean travel trade through seminars and missions.

June 4th, 2013 - Seminar in Seoul - FIT theme

July 23rd, 2013 - Seminar in Seoul - Outdoor Activity theme

October 31st, 2013 - Seminar in Seoul - Halloween theme

December 5th, 2014 - Seminar in Busan

Fly & Drive FIT Promotion

To further develop the FIT market, Brand USA Korea collaborated with United Airlines to develop the new California FIT tour product, “Fly & Drive.” Together with United Airlines, Alamo Rent-a-Car and Visit California, Brand USA Korea held an online promotion with seven major FIT agents (Seygero Tour, Hana Tour FIT, Interpark Tour, Naeil Tour, Tour Baksa, Blue Travel and Chalet Travel) within Korea.

Discover America Travel Agent Promotion

In time for the Brand USA ad campaign in Korea, Brand USA Korea worked with major Korean travel agents to display the Discover America ad creative on each of the agents’ websites.

Since eight major tour operators (Lotte Tour, Mode Tour, RedCap Tour, Very Good Tour, Lotte JTB, Online Tour, Hanjin Travel, and YB Tour) are responsible for over 40% of the outbound market share in Korea, Brand USA Korea held a special online promotion event for the U.S. package tour.

Brand USA Newsletters

Brand USA distributes quarterly, Korean language e-newsletters to the key travel trade partners to communicate and promote Brand USA objectives and initiatives. The newsletter is customized for the Korean travel trade and also includes the latest news from U.S. stakeholders in Korea. The newsletter is distributed to 900 key travel trade partners in Korea.

Events Highlights

Hana Tour International Show

Together with United Airlines (UA), Brand USA Korea participated in the 2013 Hana Tour International Travel Show (HITS) from May 24-26, 2013.

Brand USA branded U.S. booth at Hana Tour International Show. The total number of visitors during the 3-day event was approximately 85,000.

U.S. Stakeholder Meeting

Brand USA Korea organized a U.S. stakeholders meeting to communicate and discuss U.S. partnership opportunities. 40 U.S. partners based in Korea were invited to the meeting.



85,000
ATTENDEES

BRAND USA TAIWAN & HONG KONG

Market Overview

Taiwan

Taiwan received U.S. visa-waiver status in November 2012, resulting in a spike in Taiwanese travel to USA of 30.1% in the first and second quarter of 2013. The population of 23 million made over 10.23 million outbound trips in 2013, making it a huge outbound travel market. Air capacity has increased and Taiwan is currently served by carriers like China Airlines, Eva Air, Delta Air Lines and Hawaiian Airlines. United Airlines resumed their direct flights in March 2014.

Hong Kong

Hong Kong is the 4th largest outbound tourist generator in the Asia-Pacific with over four million outbound trips made annually. The FIT segment dominates with as much as 80% of travelers choosing it over group tours. Hong Kong International Airport serves as a hub for its residents as well as Southern China travelers from the Guangdong region, who are departing for international destinations from Hong Kong. Many carriers such as United Airlines, American Airlines, Cathay Pacific and Singapore Airlines have direct daily access to the USA.

South-East Asia

The South-East Asian countries of Indonesia, Malaysia, Philippines, Singapore and Thailand have a combined population of 459 million (close to half a billion) with over 725,000 trips made to the USA despite virtually no U.S. promotional efforts. These economies have been enjoying consistent GDP growth of between 5% to 10% yearly for each market.

Singapore, which serves as a gateway and air-hub for this emerging region, is an English-speaking market whose citizens enjoy visa waiver to 161 countries, including the USA. Singapore's five million residents make over eight million outbound trips annually.

Tapping on the high potential of the region, Brand USA's Taiwan and Hong Kong office, led promotional efforts with ITB Asia as a key platform in 2013. With the easing of restrictions and further opening of its economies, Vietnam and Burma (Myanmar) are also emerging as key feeder markets to the U.S.

ADVERTISING HIGHLIGHTS

To highlight the USA's diverse offerings to an affluent audience who have a proven track record of travel spending, Brand USA Taiwan and Hong Kong established a partnership with American Express International (Taiwan), American Express offered insights to the expenditure patterns of 50,000 Platinum and Centurion cardholders to assist U.S. travel merchants to promote their products.

Activities include :

- Bespoke creation of a 14-page Brand USA Direct Mail
- 2 x Adverts with branded cover
- Partners featured include American Institute In Taiwan, Discover America Committee, United Airlines, Hawaiian Airlines, The Hawaiian Islands, Guam, Alaska, Las Vegas Convention & Visitors Authority, Oh! Study USA, Idaho and Wyoming.

Media Highlights

TTG China & TTG Asia

December 2013 to November 2014, Hong Kong, Mainland China & South-East Asia

To ensure that those who sell the USA are being reached year round, Brand USA Taiwan & Hong Kong established a long-term partnership campaign with TTG China and TTG Asia from December 2013 to November 2014.

TTG China reaches a highly targeted 14,000 travel professionals in agencies, operators and wholesalers in 15 different Chinese cities.

TTG Asia in English is distributed in Singapore, Hong Kong, Macau, Taiwan, Brunei, Malaysia, Thailand, Indonesia, The Philippines, Vietnam and Burma (Myanmar).

Activity includes :

- Brand USA Cover Wrap on TTG Asia's ITB Daily
- Creating 3 x 6 pages bespoke Brand USA - ITB Asia supplements
- 10 x 1/3 front page strip adverts
- 10 x half page horizontal adverts
- 24 pages of USA advertorials
- 20 months of USA online MPU Banners
- 6 months of USA online Interstitial Banners





Public Relations & Visiting Journalist Program

Brand USA's Taiwan & Hong Kong secured a high profile opportunity to host the media fam for Hong Kong Cable TV – i-Cable Entertainment. The leading lifestyle and entertainment channel plans to film a 13-episode series about USA for a travelogue "The Happy Earth". Hosted by Asian Celebrities, the program showcases the broad spectrum of USA travel offerings positioning the U.S. as a fresh, unexpected and welcoming destination for Chinese travelers. Each episode runs 7 times a week and reaches out to Hong Kong and Southern China audiences, generating an average of half a million viewership per week.

Airfares are sponsored by United Airlines. Brand USA is working closely with hotels and resorts, cultural attractions, entertainment and restaurant dining venues and ground operators to feature all that is new and exciting. Brand USA and the production crew are currently planning the filming for Segment 2 and 3.

Activities include :

- Segment 1 is filmed in San Francisco, Nevada, Las Vegas and Arizona.
- Brand USA and the production crew are currently planning Filming Segment 2 and 3.
- Liaison between USA stakeholders including DMOs, airlines, accommodation, CVB PR contacts.
- Stories are centred on Brand USA's pillars of Great Outdoors, Culture, Urban Excitement and Indulgence.

Travel Trade Activities

LOA Partner Highlights

Brand USA - United Airlines Partnership
January to December 2014, Taiwan, Hong Kong & Mainland China

One of the most significant partnership in the start-up year was the signing of a key partnership agreement with United Airlines covering joint marketing campaigns in Taiwan, Hong Kong and Mainland China. United Airlines is a substantial player for travel from Greater China markets to the United States with a number of direct flights into Guam, Chicago,

San Francisco, New York City and Los Angeles, as well as connecting flights throughout the United States.

Through active engagement with high level executives at United Airlines, a total joint campaign value of over a million dollars was achieved. Marketing and promotional efforts will include inaugural travel trade fairs facilitating new itineraries (eg Taipei to San Francisco and Chengdu to USA), MICE and corporate travel development, outreach to media and industry events and activities.



Agent Engagement and Activity

The Brand USA Opportunity

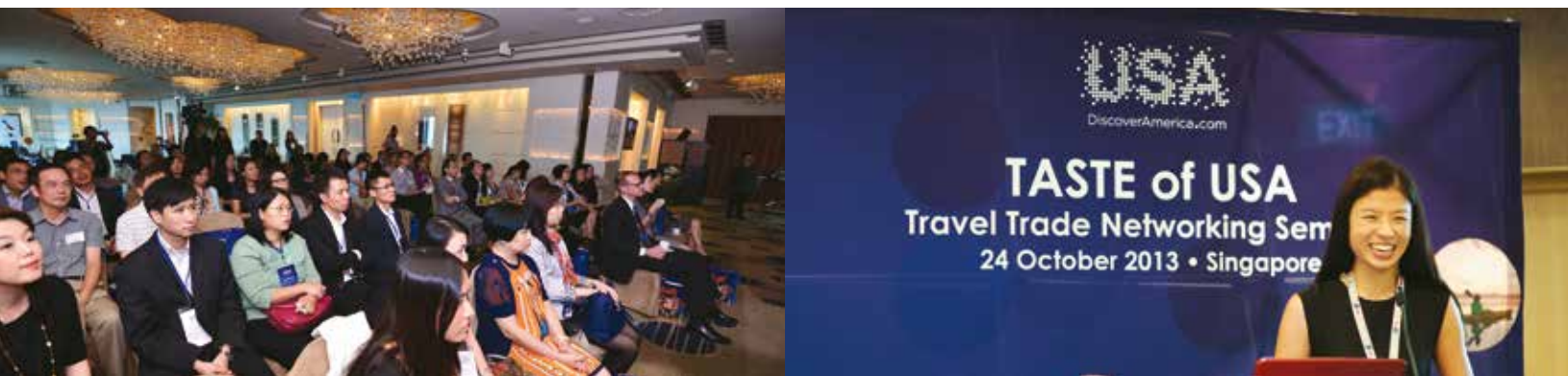
20 August 2013, Travel Trade & Media Sessions, Hong Kong
23 August 2013, Travel Trade & Media Sessions, Taiwan

With a mission to establish Brand USA in the marketplace from a start-up position, Brand USA Taiwan and Hong Kong drove a series of high impact trade and media outreach programs and educational events to connect with potential partners. Brand USA rallied major tourism partners to create

more U.S. travel packages and co-market new itineraries. The result was overwhelmingly positive participation from the industry.

'Taste of USA' Travel Trade Seminar

- 18th October 2013, Taiwan
- 21st October 2013, Hong Kong
- 24th October 2013, Singapore



Events Highlights

ITF Taipei 2013

18th to 23rd October 2013, Taiwan

Brand USA's collaboration with America Institute of Taiwan (AIT) and Discover America Committee Taiwan (DAC), resulted in a successful inaugural debut of Brand USA Pavilion at Taipei International Travel Fair 2013 (ITF) in Taiwan. The organizing Committee of Taipei ITF and Taiwan Visitors Association presented Brand USA with "The Best Booth Popularity Award."

The award-winning Brand USA Pavilion saw the largest turnout of U.S. exhibitors that included: Hawaiian Airlines, Alaska, Guam, Hawaii, Idaho, Las Vegas, Mariana Islands, Palau, Wyoming, American Express, Just Fly and Oh! Study. In total, 900 organizations and 1,350 exhibition booths from 60 countries participated in the leading four-day event. ITF 2013 set a new record of attracting 310,000 visitors, a 20.1% increase from 2012. In addition, total revenue generated had a 20% increase from last year's NT \$1.5 billion.

Activities included :

- 'Brand USA Reveal' on the front pages of The China Post.
- Opening Ceremony of the USA Pavilion attended by 60 media organizations.
- 'Taste of USA' Travel Trade Lunch Seminar attended by 80 wholesalers, tour operators, retail agents and online travel agencies from Taipei, Taichung and Kaohsiung.
- A first-of-its-kind Brand USA Direct Mailer: Targeting 50,000 Platinum & Centurion American Express Card Members.
- Socia Media Campaign USA@ITF with contest to win air-tickets and photo-sharing on Facebook.
- Brand USA Block Party with giveaways and lucky draw for consumers.
- Brand USA banners placed throughout exhibition hall.

ITB Asia 2013

23th to 25rd October 2013, Singapore

Brand USA made its inaugural debut at ITB Asia Singapore (October 23-25, 2013), bringing with it the largest turnout of USA exhibitors at the country's pavilion. The major U.S. presence at the leading trade show saw exhibitors including:

Visit Florida, NYC & Company, Las Vegas Convention and Visitors Authority, San Francisco Travel Association, Utah's Canyon Country, Caesars Entertainment, Chinese Host, Cirque du Soleil, CTN Tours, Hotel Metro, Grand Canyon West, Korean Air, Red and White Fleet - San Francisco Cruises, Skyliner Travel and Tour, Sterling Jewelers, Team America, The Meritage Collection, The Venetian & The Palazzo, Tour America, Universal Studios Orlando, and Wynn Las Vegas & Encore.

Spurred by the buoyant confidence and strong interest shown by South-east Asian buyers at ITB Asia in Singapore, Brand USA will be returning to the leading travel trade show in 2014 with an expected 20% increase in its exhibition floor area.

Activities included :

- 'Brand USA Reveal' to South-East Asian travel trade players through TTG's ITB 2014 Show Dailies.
- 'Window to South-East Asia.'
- 25 page Brand USA market information booklet covering Singapore, Malaysia, Indonesia, Thailand and The Philippines was published.

Brand USA Briefing Seminar was conducted for first-time USA exhibitors at ITB Asia.

- Opening Ceremony of the USA Pavilion attended by 80 guests including dignitaries like the Second Minister of Finance of Singapore.
- 'Taste of USA' Travel Trade Lunch Seminar where 100 wholesalers, tour operators, retail agents and online travel agencies from Indonesia, Malaysia, Burma (Myanmar), the Philippines, Singapore, Thailand and Vietnam came to explore business opportunities for USA travel.
- Brand USA Press Conference attended by 40 media organizations.







BRAND USA UK & IRELAND

Market Overview

The UK is the largest overseas market in terms of visitation numbers and the #1 spending international source market for the United States of America.

The UK economy is the fastest growing in the developed world. The second half of 2013 brought encouraging news about the improving economic situation in the UK with consumer confidence on disposable income hitting a two-year high in the third quarter of 2013, leading many in the industry to believe that now could be the right time to capitalize on this increasing optimism. The good economic news is filtering to the travel industry with bookings for 2014 up by as much as 20% for some U.S. destinations and overall running at a rise of between 8-10% year on year.

Air capacity to the USA has increased in 2014 with British Airways launching new routes and planes. New airlines, such as Norwegian Air, are also increasing capacity to a variety of U.S. destinations.

The USA continues to surpass all other long-haul destinations from Britain – only Spain and France attracted more UK visitors in 2012.

UK travel trends

- A resurgence in long haul trips
- Customers remain sensitive to price and value-add propositions
- All inclusive packages continue to rise, including cruises
- Third agers (50+) traveling and spending more
- Increase in direct bookings
- Green shoots of recovery developing further into 2014

The UK & Ireland team has implemented some ground breaking initiatives to place the USA as a premier holiday destination at the forefront of UK consumers' minds. Through programs such as Charley Boorman's USA Adventure, ESPN and The Guardian; a number of significant LOA partnerships, and supporting the travel trade via the Megafam and innovative USA Discovery Program travel agent training website, our aim is to reach all aspects of the marketplace and heavily influence the decision-making process in terms of choosing a holiday.



ADVERTISING HIGHLIGHTS

In partnership with the Expedia UK team, Brand USA UK & Ireland successfully concluded terms with Expedia to co-op Brand USA's spring consumer advertising campaign. As the sole call to action, Expedia partnered on the third phrase of the global 'Land of Dreams' campaign in the UK. The campaign was supported by digital, London 'out of home' executions and a media partnership with The Guardian. The 335 TVR campaign ran April through May 2013. Phase two of Brand USA's campaign launched in September featuring a combination of transvision and static billboard activity running in London, Leeds, Manchester, Glasgow and Edinburgh. Prominent giant transvision screens in mainline railway stations featured Brand USA's 30-second ad spot combined with an Expedia call to action. A 48 sheet 'Feel it' campaign focused on the themes of winter sun, ski, family and golf using new sensory creative executions, running across roadside billboards in those major cities. National out of home activity delivered over 214.2 million impacts.



Media Highlights

ESPN

Brand USA aims to educate and inspire more international visitors to the United States by showcasing the best that U.S. sport and recreation have to offer. The multimedia campaign with ESPN highlights the diversity of sporting experiences available in the USA. The ground-breaking partnership, launched from the UK office and reaching a global audience, consisted of:

Sports calendar: The easy-to-use tool provides background information on teams, as well as details about each game.

U.S. Sports Team Picker - 'Get in the Game': By asking users a series of questions, the game advises which sporting team he/she should support.

United States of Sport: An interactive map, United States of Sport profiles sport and tourism in all 50 U.S. states through a range of bespoke videos and rich content.

Charley Boorman's USA Adventure

Charley Boorman's USA Adventure took the explorer from Hawaii to Alaska before travelling over 5,000 miles across the contiguous United States, to showcase some of the exciting adventures and experiences the USA has to offer. Brand USA worked with production, trade, DMO and other partners to maximize this television opportunity, as well as cross-development with DiscoverAmerica.com and social media channels.

Shown on Channel 5, the broadcast reached over 2million in the UK. In addition to airing in the UK, the international version known as Charley Boorman's Extreme Frontiers is seen in over 85 countries.

TTG

Awards - Brand USA was the headline sponsor at the prestigious TTTG Awards, and received extensive exposure as headline sponsor on print, digital and ecomms marketing activities and in numerous editorial pieces.

TTG @ WTM - Brand USA partnered with TTTG, the official media partner, during World Travel Market 2013. The partnership ensured a Brand USA platform through which the DMOs and industry partners could showcase news and information reaching readers with one U.S. voice.

Travel Weekly

Running from March until November 2013, this partnership involved the creation of four standalone supplements based on the four Brand USA experience pillars to ensure the travel trade had a handy guide from which to sell the destination.

Golfbreaks.com

A multimedia partnership campaign undertaken with Golfbreaks.com, from September 2012 to December 2013, to position the USA as the golf destination, resulted in the following:

- Golfbreaks.com saw a 217% growth in number of bookings to the USA taking since launching the campaign with Brand USA
- Golfbreaks.com saw a 266% increase in number of people going to the USA since launching the campaign with Brand USA
- Golfbreaks.com sales revenue increased 452% since the start of the program

*These figures are based on the 6 month period prior to the campaign (December 2012 - May 2013) and post campaign (June - November 2013).

Public Relations & Visiting Journalist Program

The Guardian

Brand USA UK & Ireland developed a high-impact, high-profile media partnership with The Guardian. Running over six months the 'travel like a local' campaign, one of the Guardian's largest brand partnerships to date, consisted of a monthly series of real-time and crowd sourced road trips across the USA, known as Twitrips. The themed journeys took readers into the heart of the USA and showcased unexpected travel experiences as recommended by the people who live there.

With liveblogging and tweets along the way, the campaign was also supported by themed monthly print supplements focused on the themes of Music, Arts and Culture, American History, Theme Parks and Americana, Big Sky Country, and Food. The multimedia project also featured short films, interactive photo galleries, crowdsourced Spotify playlists, advertorials and both online and print promotion across all Guardian platforms.

Results:

- 2,434,248 page views globally
- 19 million Twitter accounts reached
- 183,500 microsite views
- 2.40 min average dwell time
- 40,971 competition entries
- The full content continues to live under a branded USA tab on theguardian.com/travel/usa.



Media Relations

The Brand USA UK & Ireland PR team works to raise awareness of the entire USA and highlight the diversity of experiences available across the 50 states and five territories, plus the District of Columbia. The aim is to position the USA as a premier travel destination for UK and Irish holidaymakers.

Visiting Journalist Program

Having established the Visiting Journalist Program in year one for Brand USA, the UK & Ireland PR team continues to develop the VJP by targeting key publications and journalists to experience first-hand the color and welcome of the USA as a desirable holiday destination.

VJP highlights during 2013/14 have included Aaron Miller experiencing the Navajo Nation for The Times to coincide with The Lone Ranger movie release; Sally Howard experiencing 'Southern comfort' for The Telegraph along the Mississippi; and Frank Barrett, editor of the Mail on Sunday (the UK's largest print publication), declaring that Albuquerque is 'Breaking Bad and the city where life is sweet.'



Travel Trade Activities

In 2013, Brand USA UK & Ireland continued to develop its trade partnerships by motivating major travel trade partners to create expanded programs and to market in tandem with Brand USA's strategies and activities. As partnership mechanics continued to evolve, the team delivered and implemented a comprehensive program and has capitalized on existing partnership strengths while fostering innovative large-scale co-op investment, strengthening ties and defining new strategies.

LOA Partner Highlights

In partnership with Virgin Holidays, Ocean USA, Southall Travel and Scenic Tours, Brand USA promoted all aspects of leisure travel to the USA, from inclusive package tours to organized coach tours and tailor made travel, across multimedia platforms. The UK & Ireland team provided considerable input and influence in the development of creative assets to bring these campaigns into line with Brand USA's brand and to drive towards a measurable ROI.

Further engagement with leading UK operators has helped conclude a number of recent negotiations targeting future USA program expansion, development and incremental growth, including Tui, Vacations to America and Great Rail Journeys - the full impact of which will be felt in spring 2015.

Thomas Cook

Brand USA UK & Ireland negotiated a ground breaking multi-million dollar, pan-European partnership agreement with the Thomas Cook Group consisting of a phase one value of \$14million.

The joint 'Discover America' campaign initiative aims at raising awareness of travel to the USA by highlighting the diversity of experiences available across the country. The three-month campaign launched simultaneously in the UK, Germany, Belgium and the Netherlands. Reaching consumers via an interactive social media competition, United Stories of America, the campaign was backed by a fully engaged staff development program to create Europe's largest team of USA ambassadors and incorporates the Brand USA Discovery Program.

STA TRAVEL

In partnership with STA Travel, the world's largest student and youth travel company, Brand USA created a defining multimedia partnership across key markets to reach a new audience of 18-35 year olds. The \$4million two-year campaign, aimed at increasing sales to the USA by 30% over two years, reflects the richness and diversity of the United States. It aims to spark awareness and desire in the youth segment to 'discover this land like never before.'

The Uncover/Discover campaign launched on 4th July 2013 in the UK, Northern and Central Europe, Asia, Australasia and South Africa. It features destination hubs and product pages on its dedicated websites, and opened with a competition to send four lucky winners, with a friend and a film crew, off on three separate road trips to discover the USA like never before. The result of their incredible journeys across the U.S. can now be seen in 29 bespoke destination videos.

John Constable, Chief Executive of the STA Travel Group, said: "We've seen the popularity and demand for the USA grow exponentially over the past five years. We are very excited about working together with Brand USA to promote this very special landscape."



Agent Engagement and Activity

The agent audience in the UK and Ireland is more important than ever with over 28% of travelers still choosing to book via agents. Relevant and engaging communication with this group is essential to ensure they are provided with the tools and information to sell the USA successfully to the consumer.

Visit USA Roadshows

Brand USA extended its Visit USA partnership by playing a lead sponsorship role in the 2013 series of agent training roadshows. The roadshow visited the key regional cities of Gatwick, Cardiff and Manchester and official attendance numbers exceeded 250 agents from key retail, home-worker and tour operator partners. Brand USA leveraged the opportunity with brand presence and presented a market update at each roadshow.

Social Media

In 2012, Facebook and Twitter pages were established to represent Brand USA to the UK and Ireland travel trade and the social handles continue to drive awareness of our trade activity. With over 400 fans, the Facebook page can be found under the title Discover America UK Trade ([facebook.com/DiscoverAmericaUKtrade](https://www.facebook.com/DiscoverAmericaUKtrade)) and, in excess of 430 followers, the Twitter page can be found under the handle @USATravelTrade (twitter.com/USATravelTrade).

Travel Agent Fam Photo Competition & Calendar

Brand USA re-launched the online competition that gave agents the chance to upload their photographs taken on recent familiarization trips in the USA. In excess of 200 entries were put before judges with 12 winning photographs chosen to be printed in the 2014 Brand USA desk calendar. The overall winner won a place on Brand USA's 2014 Megafam.

BRAND USA MEGAFAM

In 2013, the UK & Ireland team initiated and launched the inaugural Brand USA Megafam, bringing 100 agents from a range of UK- and Ireland-based operators together to experience multiple destinations across the United States of America.

Over 5,000 U.S. flights were logged by those agents who sold partner airlines' British Airways and American Airlines itineraries for a chance to participate on one of seven itineraries covering 19 states. The result was a resounding success and the 2014 Brand USA Megafam looks set to be even bigger.

In conjunction with British Airways, American Airlines, and destination partners, Brand USA UK & Ireland has developed seven itineraries covering 21 states, including gateway cities and locations off the beaten track. From the bright lights of the West Coast to the highlights of the East Coast and many exciting destinations in between.

After spending six nights on their designated itinerary, the seven groups will fly to Austin, Texas, for a grand finale. Here, the agents will present the highlights of their Brand USA Megafam experience with the goal of educating other agents and empowering them to sell these destinations with confidence on their return.

To qualify, agents are required to complete at least two Specialist modules on the USA Discovery Program, Brand USA's official agent training site.

All entries are logged at a bespoke website, USAmegafam.co.uk. The second Brand USA Megafam will take place 15-22 May 2014.

TTG Partnership

A robust TTG media partnership campaign was implemented to ensure direct reach and ongoing engagement with agents about the competition, along with maintaining contact with those who were not selected and other agents that did not participate. The campaign consisted of a number of different elements, including social media, print and online, editorial and interviews with senior Brand USA staff.

Events Highlights

Brand USA Industry Networking Event

Brand USA, in partnership with British Airways and in association with Avis and Washington State, hosted its inaugural industry golf and wine-tasting event in July 2013. Attended by over 80 key trade, industry and media partners, the day encouraged teamwork both on and off the golf course, while Washington State provided a selection of regional wines to be sampled by the groups. The staging provided a key platform to promote Brand USA's in-market trade objectives and partnership development opportunities.

U.S. Embassy redevelopment

The U.S. Embassy's visa application waiting room in the UK has been revamped in an attempt to make a more welcoming and informative environment for visitors. The redevelopment in London includes brochure and magazine racks, branding materials and visual screens that aim to inspire prospective visitors to discover the USA like never before. Developed by the Brand USA UK & Ireland office, this is a fantastic opportunity to reach the consumer directly and showcase different U.S. destinations to potential holidaymakers.



IPW Broadcast Media

Brand USA, in conjunction with the U.S. Travel Association, has initiated the launch of a brand new element for IPW Chicago 2014 that will allow broadcast and production media from the UK, Ireland, Australia and Canada, to participate in face-to-face appointments with U.S. destinations and travel organizations, including airlines, hotels and attractions, and take part in unique networking events to find out more about filming in the USA.

Malcolm Smith, General Manager IPW, said: "Through this new program at IPW, broadcast and production media will be able to make valuable new contacts and conduct business that would otherwise be generated only through an exhaustive number of trips to the United States."

Embassy - Winfield House cookbook 4th July

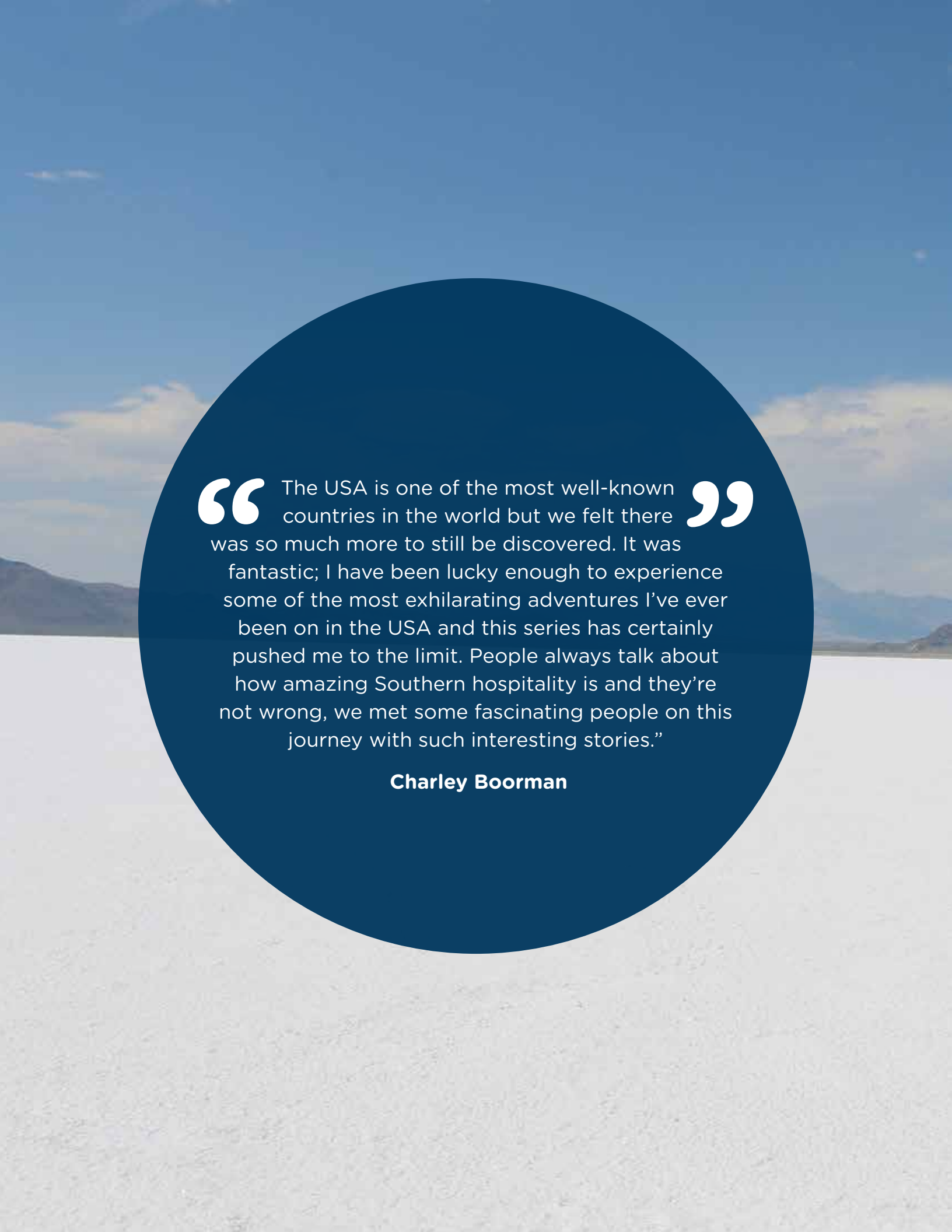
To celebrate July 4th at the Ambassador's residence, Winfield House in London, the Brand USA UK & Ireland team worked with the U.S. Embassy in creating a destination inspired cookbook. Based on recipes provided by the Embassy in London, the team devised destination content, designed and created the cookbook.

TOAB

Brand USA held two further meetings of its Tour Operator Advisory Board (TOAB) in London in July 2013 and March 2014. The initial meeting was timed to coincide with July 4th functions and the visit of Chris Thompson, President and CEO, along with Alfredo Gonzalez, Senior Vice President of Global Market Development. The second TOAB meeting took place with Jay Gray, Vice President of Global Market Development, in attendance and included a robust market report from Matt Bell, Expedia. The Board provided Brand USA with up-to-date data and intelligence regarding trade-related, economic, legislative, environmental and consumer issues affecting our market.

Travelmedia in Ireland

Brand USA co-sponsored the summer 2013 USA TravelMedia.ie Networking Event in partnership with Visit USA Ireland. The event, held in Dublin, was attended by 180 members of the Irish industry - including both media and trade. Brand USA discussed achievements and how it intends to maximize their collaborative efforts with the Irish market moving forward.



“ The USA is one of the most well-known countries in the world but we felt there was so much more to still be discovered. It was fantastic; I have been lucky enough to experience some of the most exhilarating adventures I’ve ever been on in the USA and this series has certainly pushed me to the limit. People always talk about how amazing Southern hospitality is and they’re not wrong, we met some fascinating people on this journey with such interesting stories.”

Charley Boorman



BRAND USA GLOBAL REPRESENTATIVES

AUSTRALIA & NEW ZEALAND - GATE 7



JO PALMER
Managing Director



JOE PONTE
Director Australia & New Zealand



TAHNEE DOBSON
Account Manager Australia



WAYNE MITCHAM
Account Manager New Zealand

BRAZIL - OGILVY PR



JENNIFER RISI
Managing Director



RENATA SARAIVA
Director Brazil



TARA MULLINS
Vice President



MARISSA LYMAN
Senior Account Executive



MARIANA ABRANTES
Account Executive Trade



KAREN ALMEIDA
Account Executive PR

CHINA - AVIAREPS MARKETING GARDEN



TINA YAO
Shanghai Office Director



MAVIS ZHENG
Beijing Office Director



SPRING ZHENG
Travel Trade Marketing Director



ANITA JIA
Public Relations & Co-op Director



JENNY GUAN
Travel Trade Marketing Manager



KRISTEN CAO
Public Relations & Co-op Manager

GERMANY, AUSTRIA & SWITZERLAND - BRANDMASTERS AMERICA



MARTIN WALTER
Managing Director



GABI ROMBERG
Director Public Relations



CHRISTIAN ZERBIAN
Country Manager



MICHELLE BIES
Marketing Assistant



ALBERT JENNINGS
Director Research & Social Media



RITA HILLE
Director Events, Promotions & Shows

INDIA - SARTHA MARKETING



SHEEMA VOHRA
Managing Director



SUNIL PURI
Executive Director



ANEETA SHAH
Account Manager



NAMRATA BANSAL
Account Director- PR



NAVIN DORAI
Travel Trade Manager



ANINDITA LAL
Marketing Assistant

JAPAN - AVIAREPS MARKETING GARDEN



MICHAEL MERNER
Account Supervisor,
Japan, Korea & China



YOICHI HAYASE
Asia and Strategy
Director



MITSUTERU HADA
Travel Trade Director



YUKA INUI
Public Relations
Promotions Director



MIKA AOKI WHITE
Public Relations
Promotions Manager

MEXICO & CENTRAL AMERICA - ADNOVA



BENJAMIN DIAZ
President



ADRIANA DE LA TORRE
PR Vice President



MARCELA CARMONA
Trade Manager

SOUTH KOREA - AVIAREPS MARKETING GARDEN



EMILY KIM
Travel Trade Marketing
Director



IRENE LEE
Public Relations
Director



GINA CHOI
Marketing & PR
Manager



JUSTIN JUNG
Marketing & PR
Executive



ELLIE SHONG
Marketing Assistant

TAIWAN / HONG KONG - BRANDSTORY, CONNECT WORLDWIDE



REENE HO PHANG
Managing Director



ELYN XU
Manager PR Media



SAM CHEN
Partnership Manager



CECILIA CHEN
Assistant Manager, PR



RACHEL LIM
Assistant Partnership
Manager



JOANE LING
Executive, PR & Media
Relations

UK & IRELAND - BLACK DIAMOND



GUY CHAMBERS
Managing Director



JONAH WHITAKER
Strategy Director



SARAH BARNETT
PR & Communications
Director



GERRY BOYLE
Account Director



ARABELLA ARTHY
Senior Account
Manager



SIOBHAN BURKE
Communications
Account Manager



JENNIFER BYLES
PR Account Manager



JENNIFER GUIVER
Travel Trade Executive

BRAND USA TECHNOLOGY DEVELOPMENTS

Digital and social media plays a large role in how we inspire international travelers to visit the United States. Through its consumer brand "Discover America", Brand USA has localized its presence in nine markets. Brand USA partners with local experts to create culturally relevant content, while still remaining true to the Discover America voice and marketing strategy. Brand USA is active on the following social networks and has a wide number of followers and engagement. Brand USA has received over 400% growth on its social channels, and its audiences continue to increase.

- Facebook
- YouTube
- Twitter
- Instagram



DiscoverAmerica.com

DiscoverAmerica.com is the official travel and tourism site for the USA. This year Brand USA welcomed 4.6 million visitors from all over the world. To better inspire international audiences, DiscoverAmerica.com underwent some significant updates this year. Here are some of the highlights:

- Redesigned homepage with updated navigation
- Integrated Google Maps
- Comprehensive trip planning and sharing features
- Instagram overlay onto a map of the USA

GoUSA.cn: Brand USA in China

This year Brand USA launched its custom-created website in the Chinese market: GoUSA.cn. The interactive website features robust trip planning features and receives an average of nearly 300,000 monthly visitors. The website launch was complemented by the launch of Brand USA's localized social sites (listed below), with a total of nearly 1 million fans in China alone.

- Sina Weibo
- Renren
- WeChat
- Facebook
- Tencent Weibo
- Youku

ROAD TRIP

Get on the Discovery Highway with Discover America

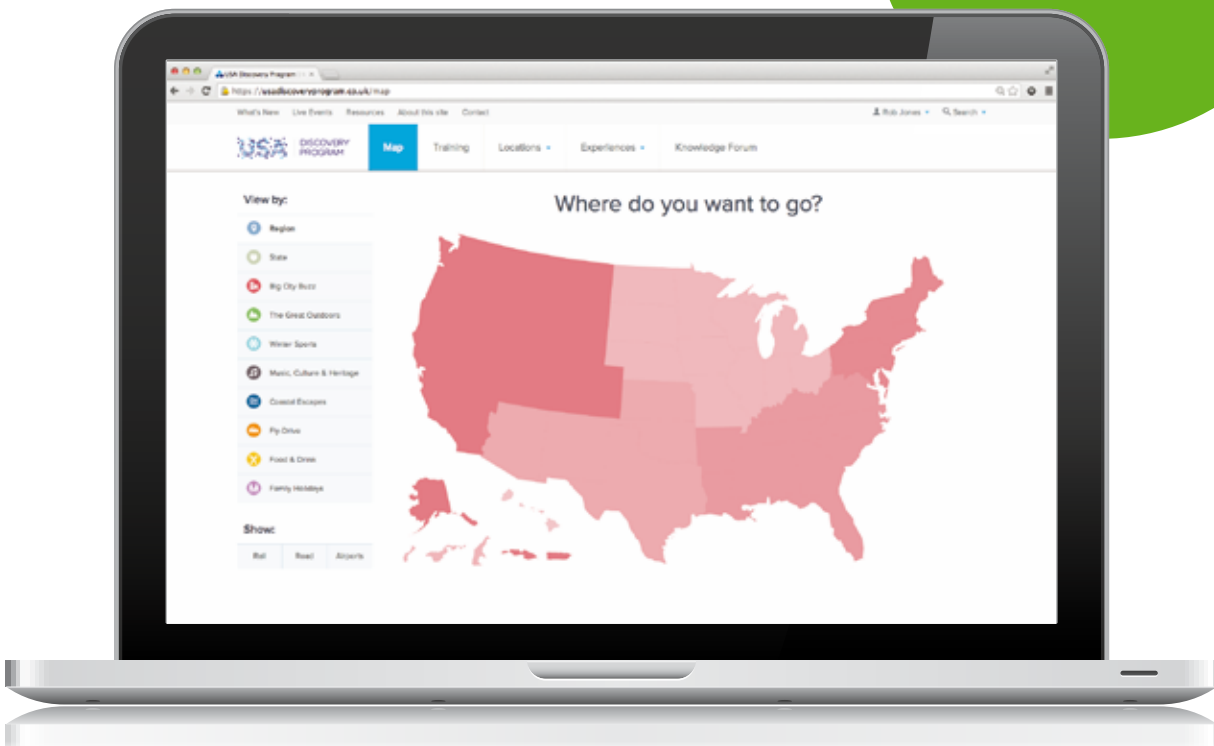
This year, Brand USA launched a global road trips campaign inviting travelers to discover the USA from the freedom of the open road. Brand USA featured 39 states in 10 different road trips that traveled the United States on its digital and social platforms. Brand USA also invited key influencers from all of its markets to take these road trips and share their first-hand experiences with the world. This campaign lived across international social channels and was customized for each market.



BRAND USA USA DISCOVERY PROGRAM

The Brand USA Discovery Program for the UK and Ireland was launched at IPW 2013. Housed at USADiscoveryProgram.co.uk, this is the first Brand USA training tool where agents can find straightforward information on regions and U.S. states and territories, as well as experiences and holiday themes, which provide an overview of the USA as a destination and enable cross-selling on all aspects.

ACTIVE MEMBERS
2200+



USA Specialist

Agents can take interactive quizzes to become USA Specialists, and receive official badges as a recognised qualification of expertise. The online learning environment allows agents complete flexibility throughout the course, learning in their own time, at their own pace. There are six regional tests that need to be completed before moving onto the specialist modules, which are more experience based. It is when agents pass these quizzes that they become a USA Specialist.

There are currently eight USA Specialist modules:

- Big City Buzz
- Great Outdoors
- Winter Sports
- Music, Culture & Heritage
- Coastal Escapes
- Fly-Drive
- Food & Drink
- Family Holidays

Expanding Globally

The USA Discovery Program will be launching in Australia, China, Brazil and India throughout 2014.

Partner Opportunities

There are a number of partner buy-in opportunities available on the USA Discovery Program, these include:

- Creating a new custom training module
- Live events & webinars
- Advertising
- Free of charge video uploads

For more information, contact

Karyn Gruenberg kgruenberg@thebrandusa.com
Sarah Barnett sbarnett@thebrandusa.co.uk

BRAND USA LOOKING TO THE FUTURE

As the nation's first destination marketing organization, Brand USA's mission is to increase international visitation to the United States of America and grow its share of the global travel market. In doing so, Brand USA welcomes millions of new international visitors who come to the United States and spend billions of dollars, which in turn supports and creates millions of U.S. jobs.

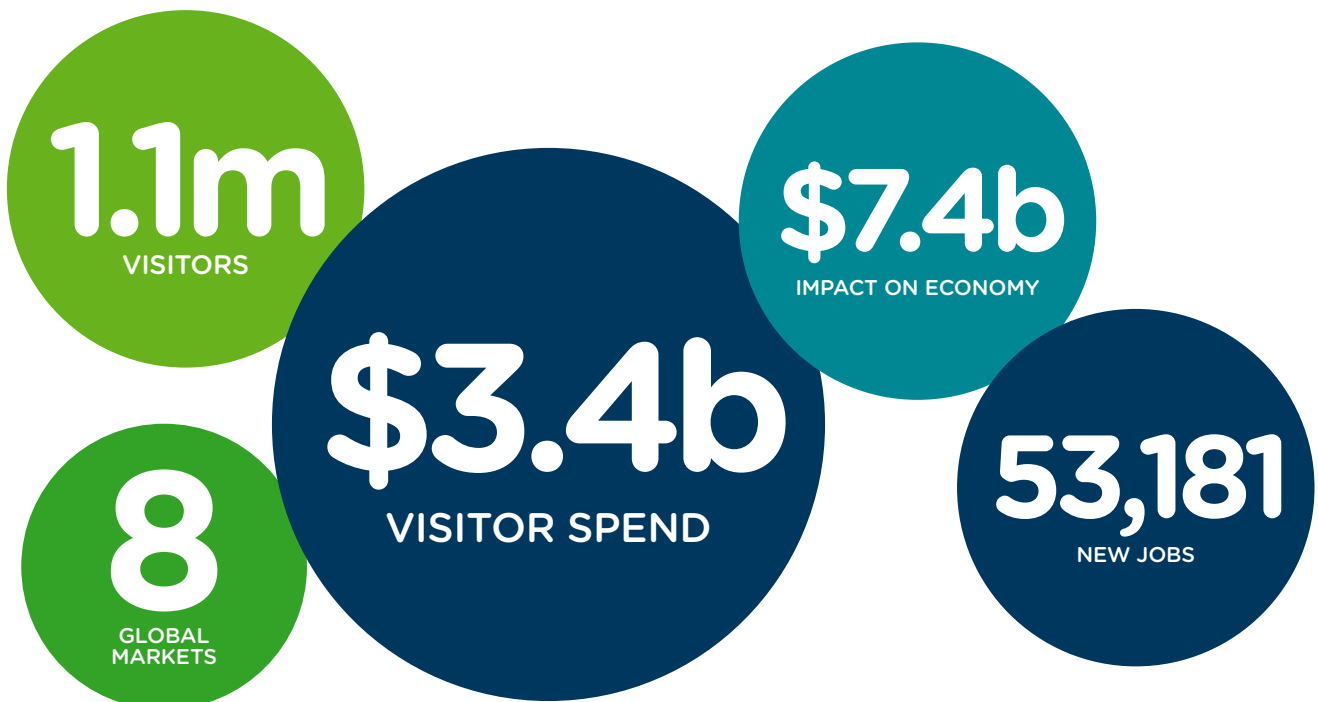
In 2012, Brand USA launched a successful, first-ever, direct-to-consumer marketing campaign for the United States, greatly increasing intent to visit in its inaugural launch markets of Canada, Japan, and the United Kingdom. Brand USA's marketing campaigns are having a significant and positive impact on U.S. international arrivals and, consequently, the U.S. economy.

As reported in a study conducted by Oxford Economics, Brand USA's marketing campaigns generated 1.1 million incremental visitors to the United States. These additional visitors spent \$3.4 billion in the United States, including travel and U.S. carrier fare receipts, which resulted in a 47:1 return on investment.

Last year, Brand USA redeployed its highly effective marketing campaign in the three inaugural markets and expanded into Australia, Brazil, China, Hong Kong, Taiwan, Germany, Mexico and South Korea. These eleven markets represent 75% of inbound travel to the United States. In addition, Brand USA is broadening its footprint around the globe with in-market representation and trade show participation in 20 markets.

Brand USA is committed to promoting the United States as a compelling destination for international travelers. It will continue to build a world-class organization that will execute an integrated marketing and communications strategy designed to deliver the highest possible return for the United States in the form of job creation, GDP and export growth, as well as increased federal tax revenues.

There is no place in the world like the United States of America with its limitless opportunities. Brand USA looks forward to working with all of its partners over the next year as it continues to welcome the world to, "Discover this land like never before."



Brand USA will be introducing new promotions and campaigns throughout the year, some of which will be announced at this year's IPW. Below are a few highlights:

Culinary Initiative

Brand USA's new culinary initiative will kick-off in July this year with the launch of a culinary guide to the United States. The guide will be a high-quality and enticing publication that inspires the world to discover the destinations and tastes of the United States like never before. It will bring together some of the best-known American chefs and dishes with the destinations they represent. The guide is being put together with the State Department's Diplomatic Culinary Partnership, an exciting collaboration with James Beard-recognized chefs.

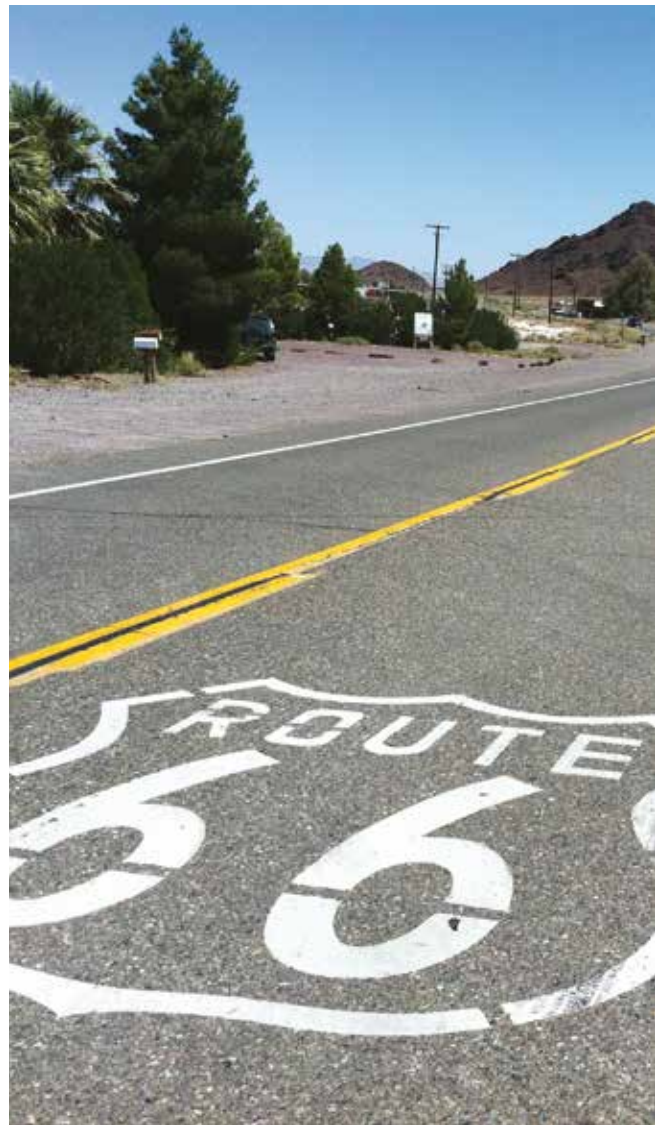


The culinary guide will be launched at Independence Day celebrations at several U.S. embassies and consulates around the world. Chefs from the Diplomatic Culinary Partnership will travel to several of these embassies for a week of culinary diplomacy and travel promotion. These efforts will be accompanied by a robust digital and social platform to drive interest in culinary experiences across all regions of the United States.

The Brand USA Effect

Brand USA has partnered with multiple Emmy-winning investigative reporter and producer, Peter Greenberg to develop a video series highlighting the Brand USA Effect. Greenberg, who is known in the industry as "The Travel Detective," will use his investigative skills to develop segments on the impact of international travel in ten key destinations across the USA.

Each segment will provide an industry overview, interviews with key travel industry leaders, local business owners and international tourists while capturing the essence of the destination. Peter Greenberg will capture anecdotal stories from Brand USA partners across the United States.

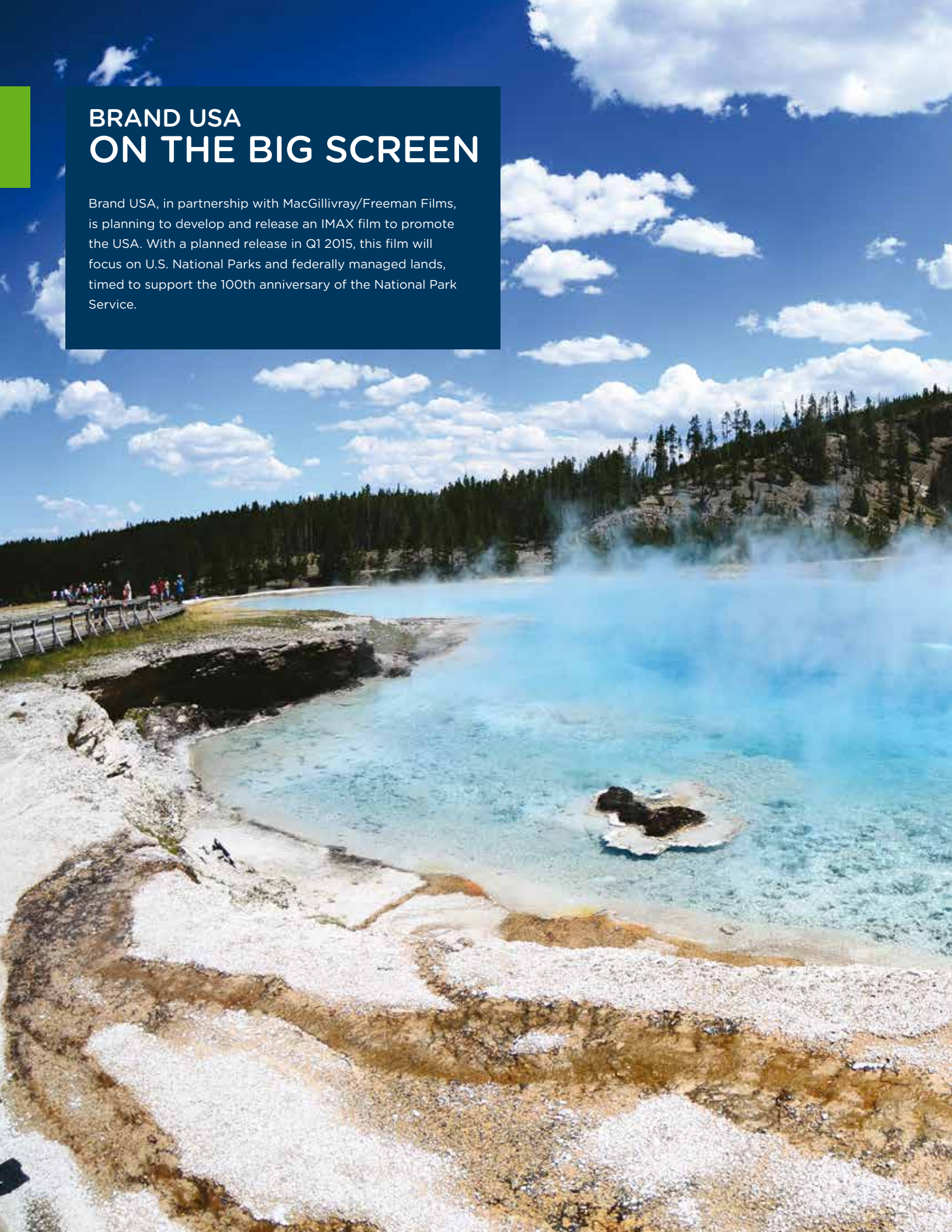


NATIONAL GEOGRAPHIC

Brand USA has partnered with National Geographic to create The Great American Road Trip: five different journeys across the United States with renowned digital nomad, Andrew Evans. The journey will launch at IPW 2014 as the Digital Nomad takes off on Route 66 and then spends three to four days at each stop exploring, blogging and taking photos and videos. Brand USA will also support this initiative with digital content and promotion.

BRAND USA ON THE BIG SCREEN

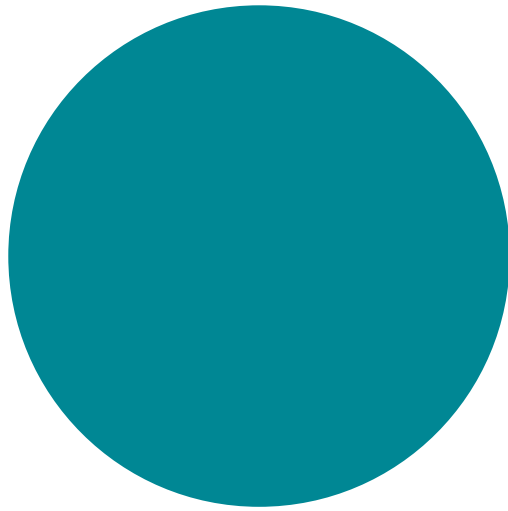
Brand USA, in partnership with MacGillivray/Freeman Films, is planning to develop and release an IMAX film to promote the USA. With a planned release in Q1 2015, this film will focus on U.S. National Parks and federally managed lands, timed to support the 100th anniversary of the National Park Service.











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