

Unlocking Global Potential

**Brand USA 101 to Attracting International
Visitation Through Collaboration**

What We'll Review Today

- 
- A woman and a child are riding horses through a lush green valley. The woman is in the foreground, smiling, wearing a blue shirt and a hat. The child is behind her, also smiling, wearing a plaid shirt and a hat. They are riding on a dirt path. In the background, there are mountains with patches of snow and a blue sky with light clouds. The overall scene is bright and scenic.
- 1. Brand USA: Who We Are and Where We Market**
 - 2. Implementation: Brand USA's Marketing Efforts in Action**
 - 3. Rising Together: How to Partner with Brand USA**

01

Brand USA's Role & Impact



**BRAND USA WORKS TO INCREASE
INTERNATIONAL VISITATION TO THE
UNITED STATES IN ORDER TO FUEL THE
U.S. ECONOMY AND ENHANCE THE IMAGE
OF THE UNITED STATES WORLDWIDE.**



PROMOTION

U.S.
Travel &
Tourism

U.S. TRAVEL
ASSOCIATION®

ADVOCACY



POLICY

BRAND USA FUNDING MODEL

and the Electronic System For Travel Authorization (ESTA)



Traveler applies for a travel authorization (ESTA) on the Department of Homeland Security website at:

esta.cbp.dhs.gov/esta

The **\$21** Fee is paid to the Department of Homeland Security.

The ESTA is valid for multiple trips to the USA for two years.



\$4 covers administrative cost for the U.S. Department of Homeland Security



\$17 is held in the Travel Promotion Fund in the U.S. Treasury

For every \$1 Brand USA raises in cash and in-kind contributions, Brand USA is eligible to receive \$1 from the Travel Promotion Fund (up to a max. of \$100M annually).

100M Contributors + **100M** Travel Promotion Fund

USA

VisitTheUSA.com

Brand USA

Where
Brand USA
Fits In

Regional DMOs

State DMOs

Local DMOs

Brand USA Economic Impact



Over the past 11 years (FY13 – FY23), Brand USA's marketing efforts have generated:

8.7 MILLION incremental visitors



\$28.8 BILLION incremental spending



Over 36,800 incremental jobs
on average supported each year

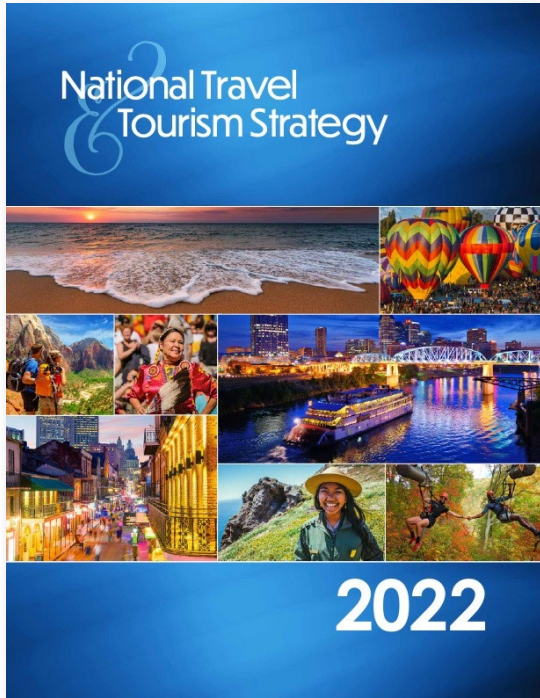


\$8.3 BILLION in federal, state, and local taxes



Nearly \$63 BILLION in total economic impact

NATIONAL TRAVEL & TOURISM STRATEGY



Focuses federal efforts to support travel and tourism in the U.S.

Establishes a five-year goal of attracting

90 million visitors, who will spend **\$279 billion** annually

Envisions private and public sectors working together to increase the value and volume of tourism

A person is walking through a slot canyon with wavy, layered rock walls. The rock is a mix of orange and red, with white and yellow streaks. The person is in the center of the frame, walking away from the camera. The canyon walls are curved and layered, creating a sense of depth and scale. The lighting is bright, highlighting the textures of the rock.

U.S. REMAINS THE WORLD'S MOST POWERFUL TRAVEL & TOURISM MARKET

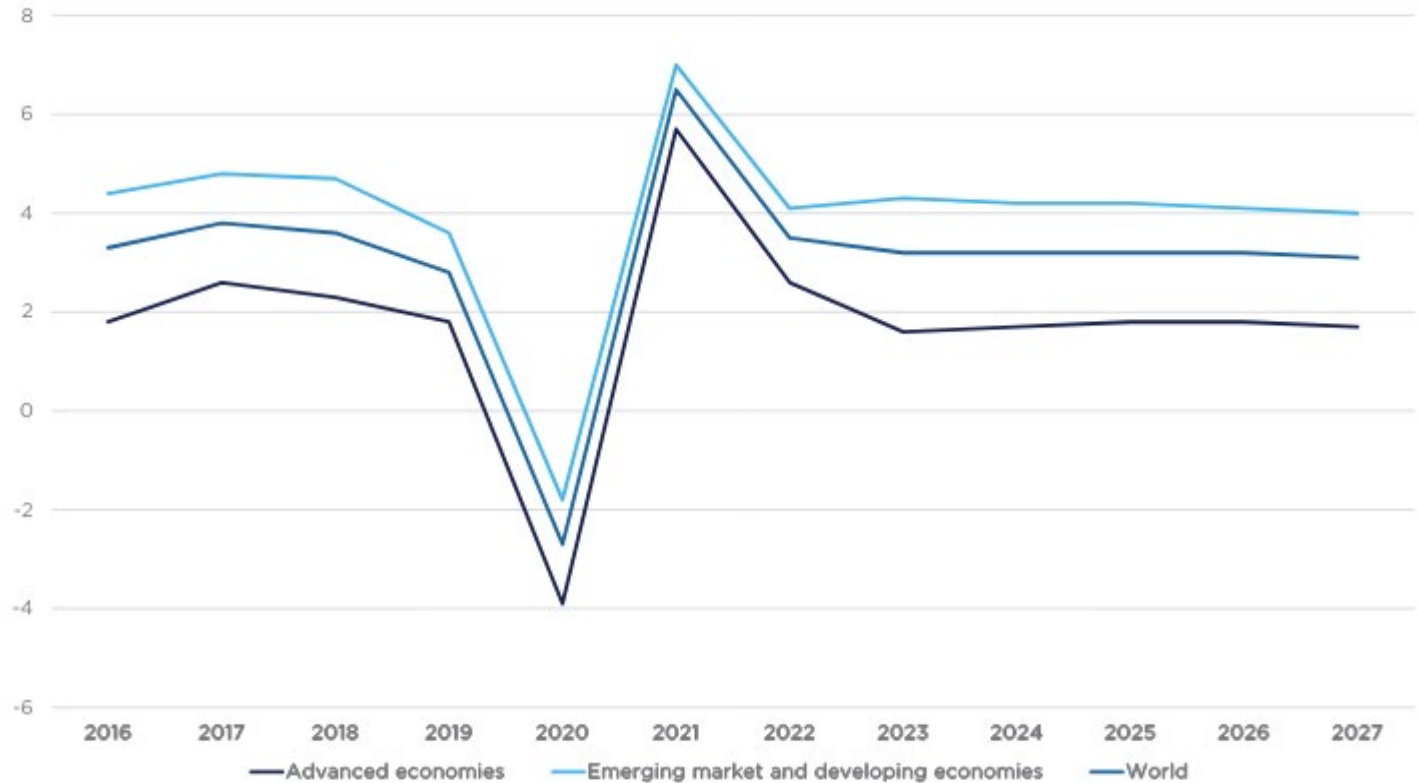
\$2.3 TRILLION WAS CONTRIBUTED TO THE
ECONOMY IN 2023

BRAND USA'S GLOBAL OUTLOOK



Global Economic Outlook

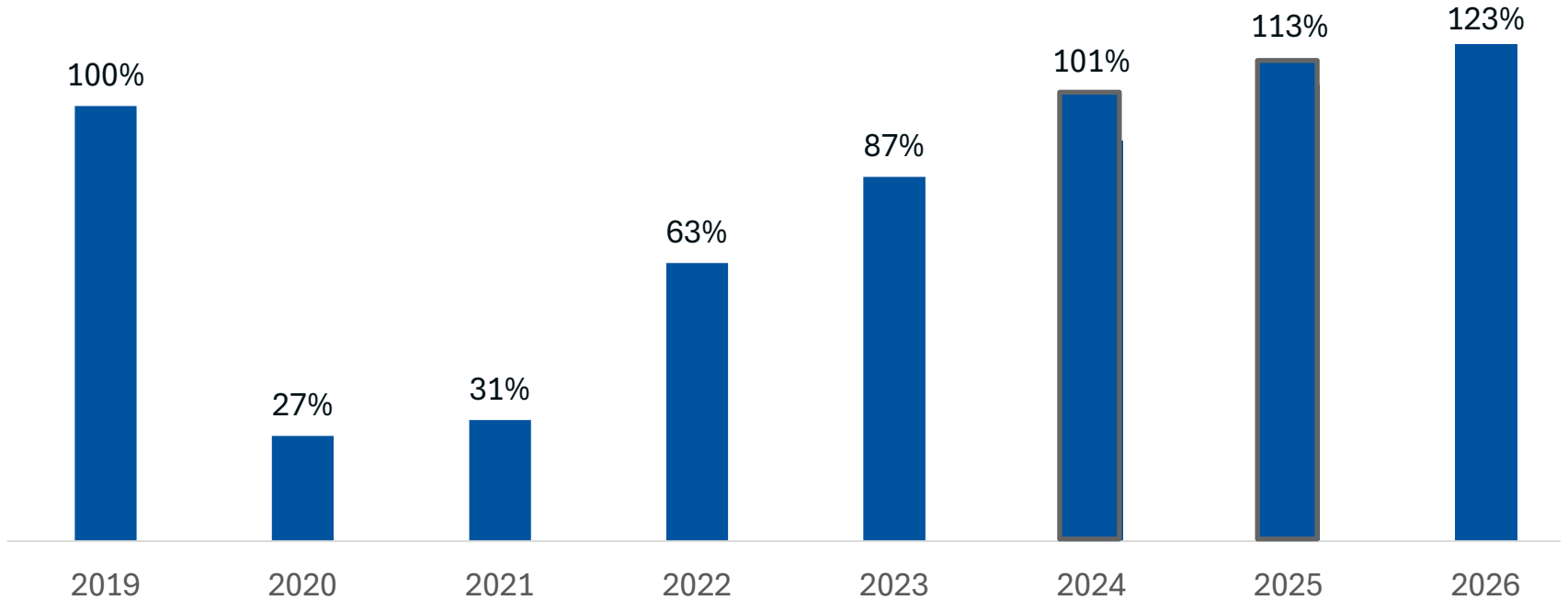
REAL GDP GROWTH (Annual % change)



Global Tourism Landscape

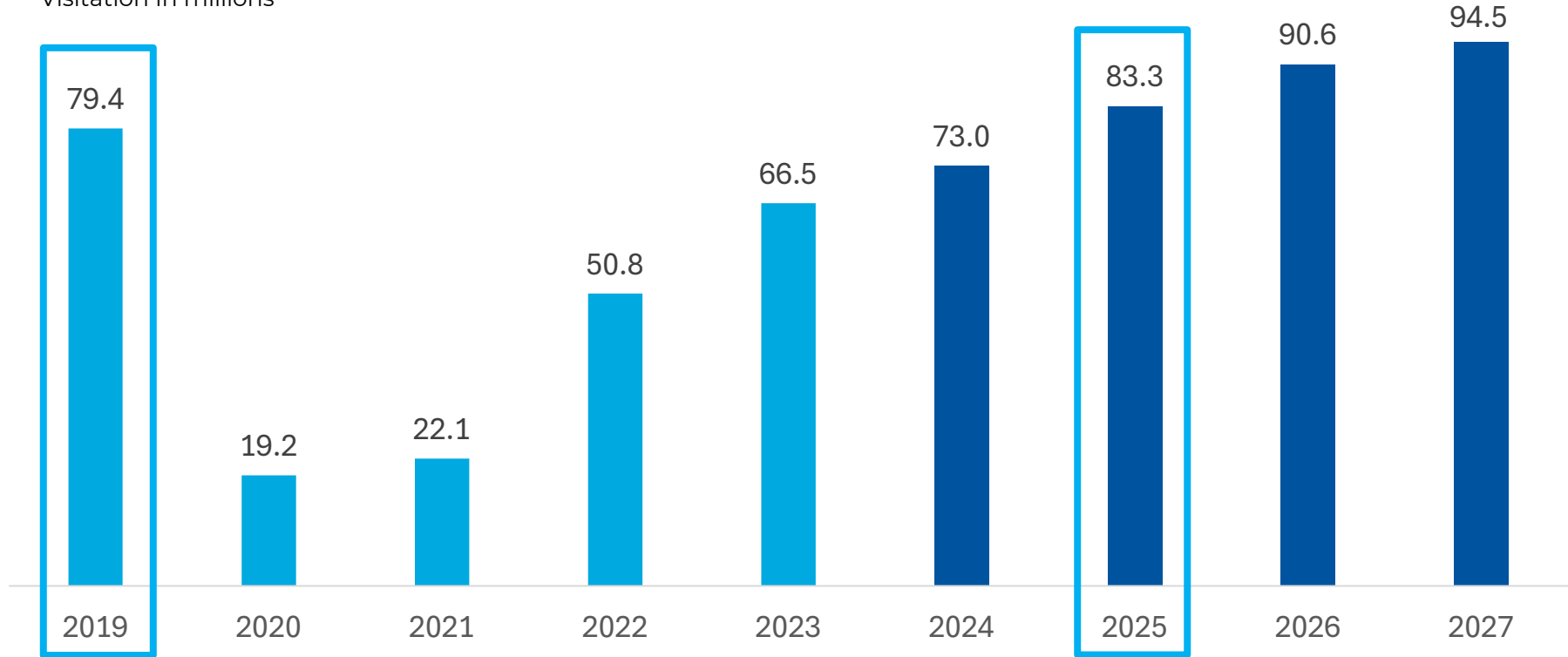
Global International Travel

% relative to 2019 levels



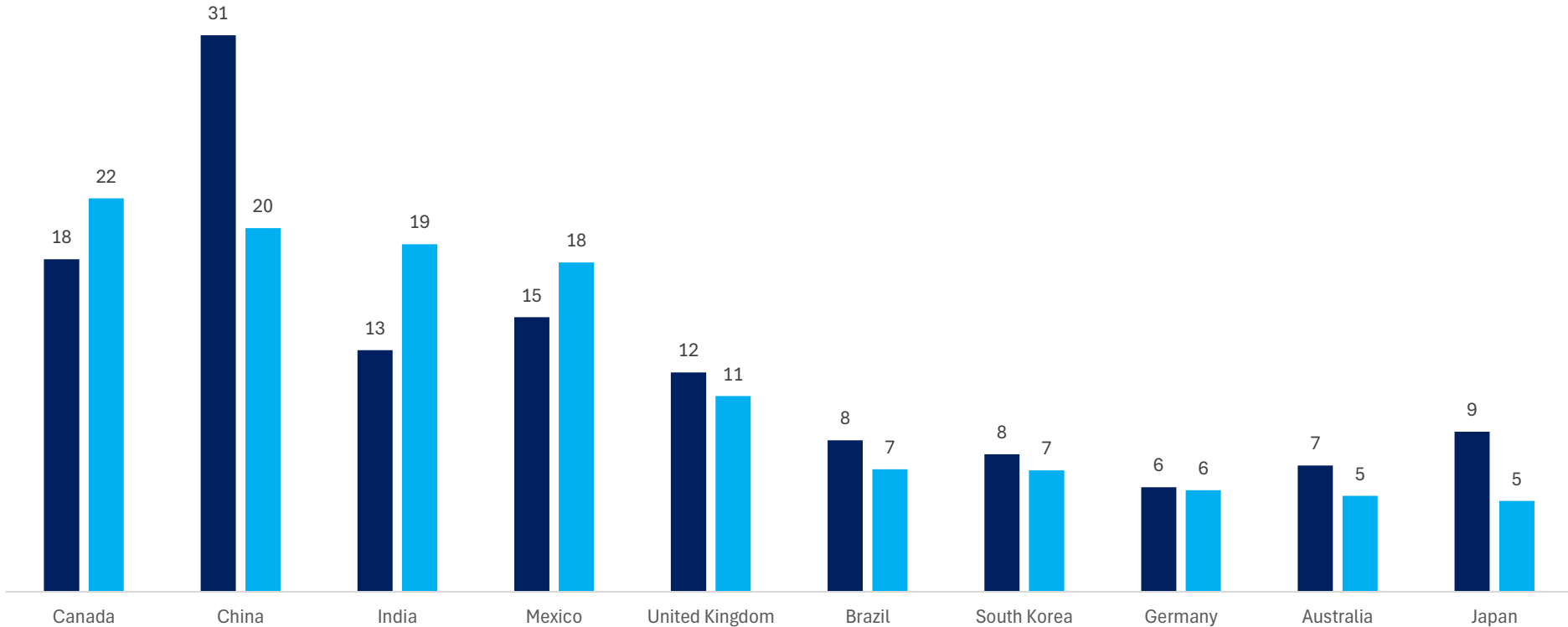
U.S. Inbound Travel Forecast: Visitation to surpass pre-pandemic levels in 2025

Visitation in millions



Spending: Top Markets 2023

Spending in \$billions



2024 Year-to-Date U.S. Travel and Tourism Spending

\$147B

YTD (JAN-JULY)

+16%

YTD (JAN-JULY)

\$649M

SPENT PER DAY

Impact of Top 12 Markets

80% of visitation comes from:

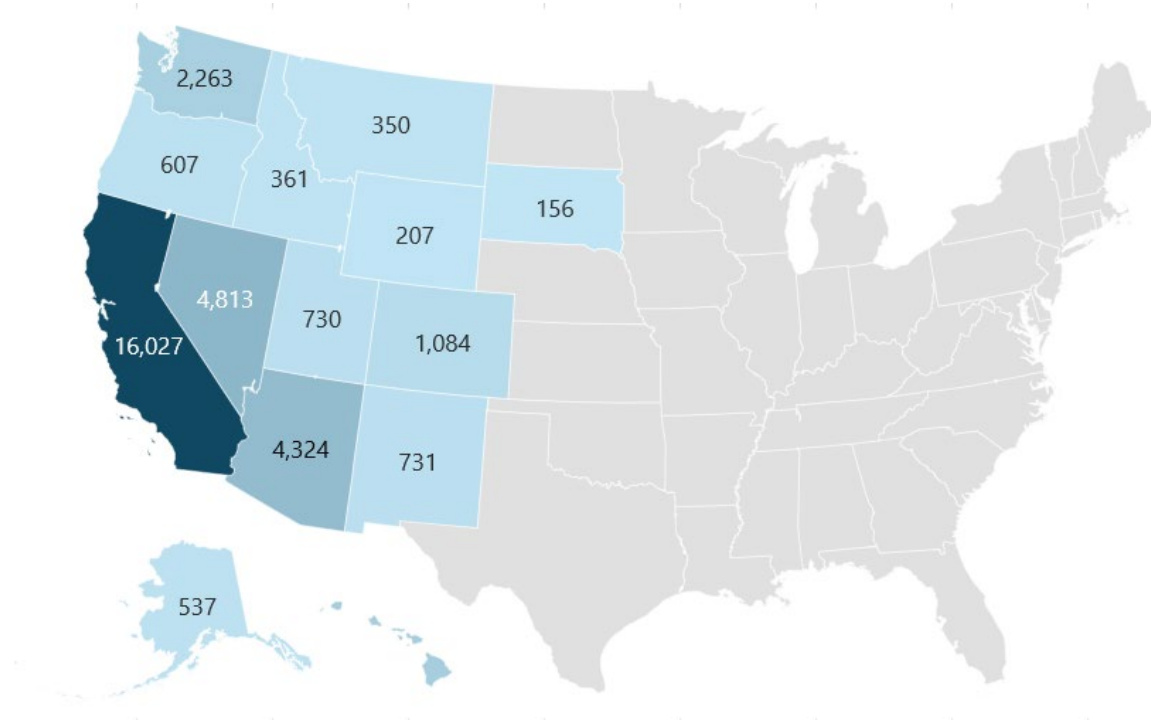
- Canada
- Mexico
- United Kingdom
- Germany
- India
- Brazil
- South Korea
- France
- Japan
- China
- Italy
- Australia



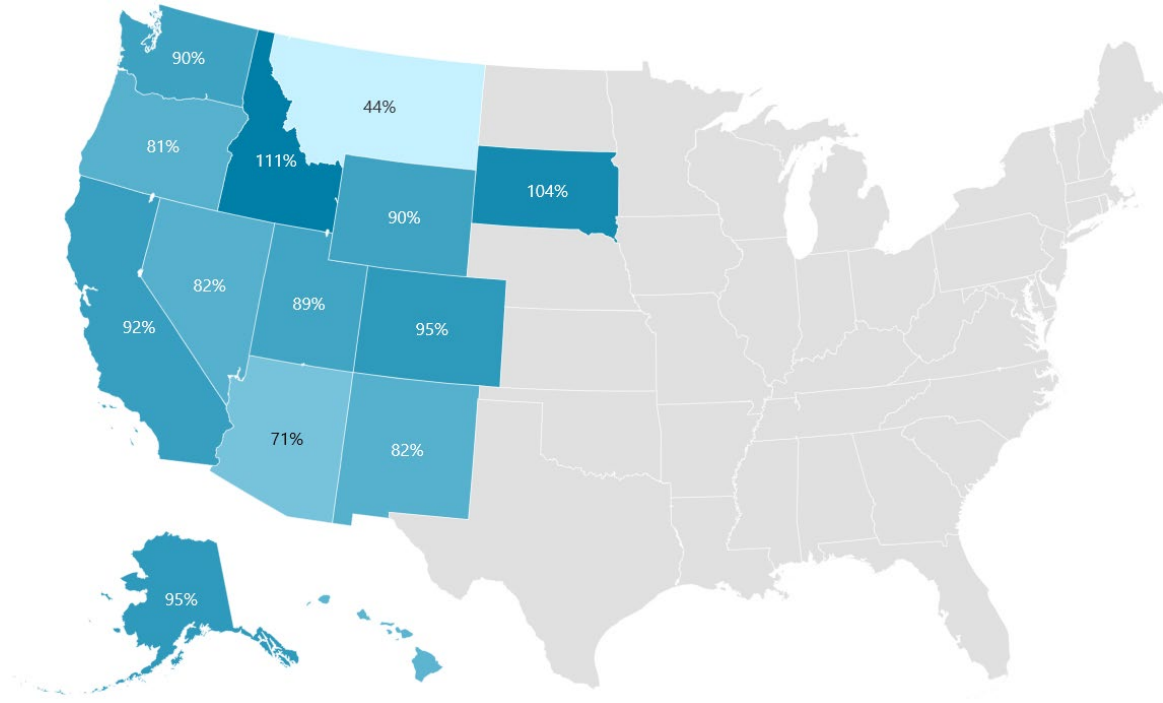
GoWest Visitation



2023 Visitation by State



Recovery by State



Brand USA

GoWest Airlift



Connectivity

106

Origin
Airports

180k

Non-stop
Flights

24

Destination
Airports

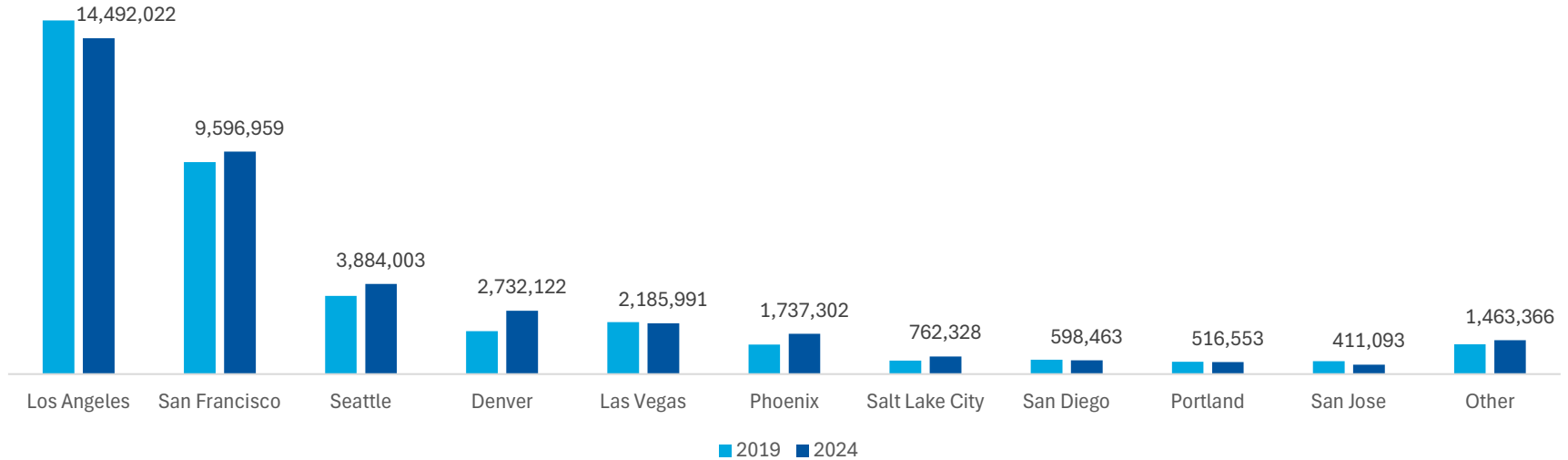


Top 15 Markets Based on 2024 Seat Capacity

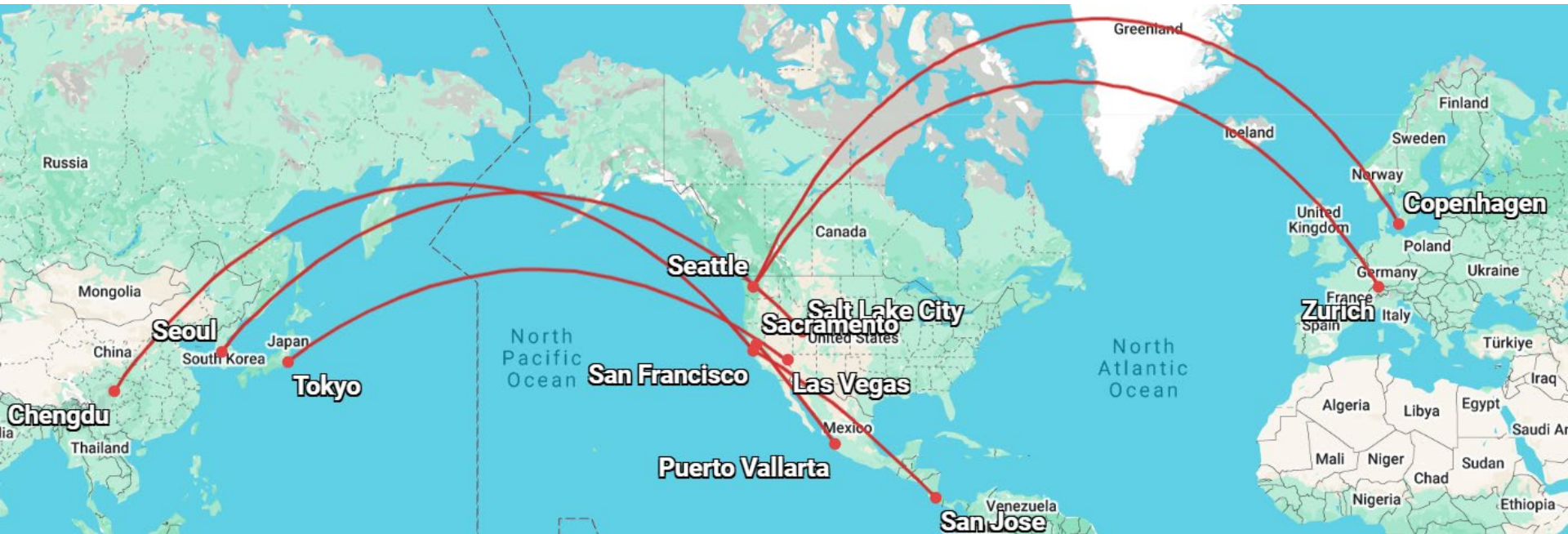
Non-stop seat capacity in 2019 and 2024

	2019	2024 ↓	2024/2019
Mexico	6,430,598	8,298,791	129%
Canada	6,863,917	6,796,068	99%
United Kingdom	3,157,837	3,217,062	102%
Japan	1,994,896	2,304,021	115%
Taiwan	1,380,473	1,892,823	137%
Germany	1,569,072	1,724,629	110%
South Korea	1,396,784	1,613,697	116%
France	1,255,210	1,231,337	98%
Australia	1,447,087	1,170,081	81%
China	2,677,258	944,268	35%
Netherlands	811,659	790,467	97%
Hong Kong - China	1,188,807	727,868	61%
El Salvador	342,934	597,474	174%
Turkey	253,723	577,000	227%
Philippines	494,965	532,443	108%

2024 Seat Capacity by Destination



New Routes 2025



Brand USA

BRAND USA MARKET SELECTION PROCESS

A group of four mountain bikers, including a child and three adults, are gathered on a dirt trail in a forest. They are wearing helmets and cycling gear. The scene is set in a wooded area with tall pine trees and a dirt path. The lighting suggests it's daytime. The text 'BRAND USA MARKET SELECTION PROCESS' is overlaid in large white letters across the center of the image.



How Do We Select Our Markets?

OPPORTUNITY

Travel Market Size
Country Size
Market Growth
Headroom

PROPENSITY

Sentiment
Alignment

VALUE

Purchasing Power
Visitor Value
Affordability
Market Presence

CONSTRAINTS

Risk
Accessibility

PLANNING PREFERENCES

Planning Timeline
Last International Trip
Preferred Travel Months

ONLINE BEHAVIOR

Google Trends
Social Listening
Channel / Website Preferences

IMPRESSIONS & INTEREST

Travel Motivators
Impressions of the USA
State Preferences
Net Promoter

A photograph of a person camping on a rocky mountain peak at sunset. The person is lying on a yellow sleeping pad with a green tent and other gear. The sun is low on the horizon, casting a warm glow over the scene. The background shows rugged mountains under a clear sky.

**Focus on
Consumer
Sentiment &
Behavior**



Travelers have a desire to experience scenic routes.

89%

of travelers want to travel to destinations that they have been before

**DRIVING
COMFORTABILITY**

11

days stayed on average

Brand USA



02

Brand USA Marketing In Action

FY25 TARGET MARKETS

North America

Canada
Mexico

Latin America

Brazil
Colombia

Europe

Benelux
*(Belgium, Netherlands,
Luxembourg)*

German-speaking region
(Germany, Switzerland, Austria)

France
Ireland
Italy

The Nordics
*(Denmark, Norway, Sweden,
Finland, Iceland)*

Spain
United Kingdom

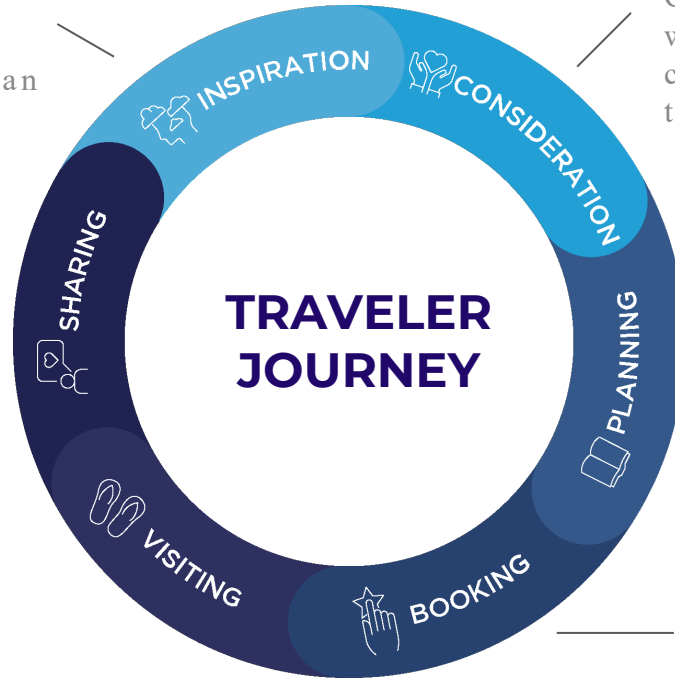
Asia & Oceania

Australia & New Zealand
China
India
Japan
Southeast Asia
South Korea

STRATEGIC MARKETING FRAMEWORK

Inspire with a Variety of Distinctive Possibilities

Showcase the freedom and transformative, distinctive experiences only the USA can offer travelers.



Educate with Targeted & Individualized Experiences

Create confidence by connecting travelers with destinations and experiences so they can personalize their USA trip based on what they love.

Simplify Planning

Help travelers make the most of their visit by sharing valuable resources to aid in their active decision-making process.

Convert Travelers with Urgency & Seamless Integrations

Drive urgency to book now through our partners.

A man and a woman are smiling and looking at each other. The man is on the right, wearing a dark shirt, and the woman is on the left, wearing a white sweater. They are in a field with several hot air balloons in the background, some of which are orange and red. The scene is set during sunset or sunrise, with a warm, golden light.

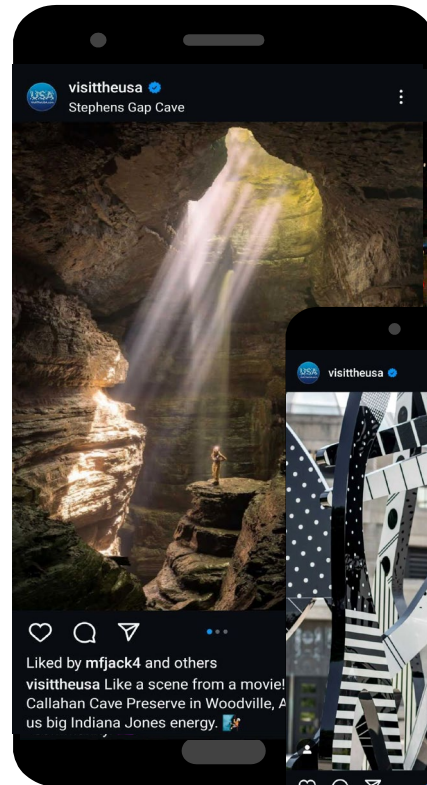
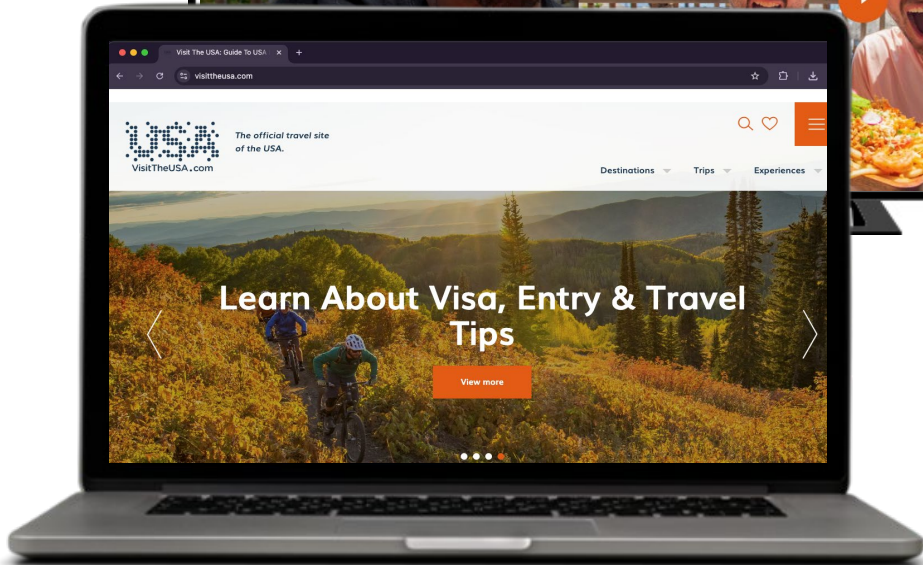
Experience it all.

In our previous campaign, we declared, "This is where it's at." Now, with "Experience it all," we aim to empower people to imagine and immerse themselves in the diverse and enriching experiences US has to offer.

Our campaign emphasizes that a trip to the US isn't just about reaching your destination. It's about discovering a travel experience that's tailored to your desires and consistently exceeds your expectations. It's not just about the places you visit; it's about the emotions, stories, and lasting moments you create.



INSPIRATION AND CONSIDERATION





WANT TO BE FEATURED?

SEND US YOUR CONTENT!



WE ARE ALWAYS ACCEPTING

- Image and video assets for social media promotion.
- Episodic video assets for our streaming channel.

WHAT WE LOOK FOR

- Story arc. The storyline must have a concrete beginning, middle, and end for viewers to follow, as well as engaging emotion through drama, conflict, fun, or comedy.
- Builds a unique sense of place by featuring cultural elements such as food, music, sports, tradition, or other attributes
- Motivates a viewer to say: "I want to go do that thing, in that place, with those people!"

PLANNING AND BOOKING

RHYTHMS OF THE RIVER

ILLINOIS – MINNESOTA – WISCONSIN – IOWA
MISSOURI – TENNESSEE – MISSISSIPPI – LOUISIANA

USA
Brand USA
ROAD TRIPS
USA

START OPTION 1

Chicago to Springfield, Illinois 3 hours and 11 minutes / 325km
Springfield, Illinois to St. Louis, Missouri 1 hour and 30 minutes / 155km

START OPTION 2

Minneapolis & Bloomington, Minnesota to Dubuque, Iowa 4 hours and 39 minutes / 406km
Dubuque, Iowa to Hannibal, Missouri 3 hours and 48 minutes / 392km
Hannibal, Missouri to St. Louis, Missouri 1 hour and 54 minutes / 188km

CONTINUING FROM ST. LOUIS

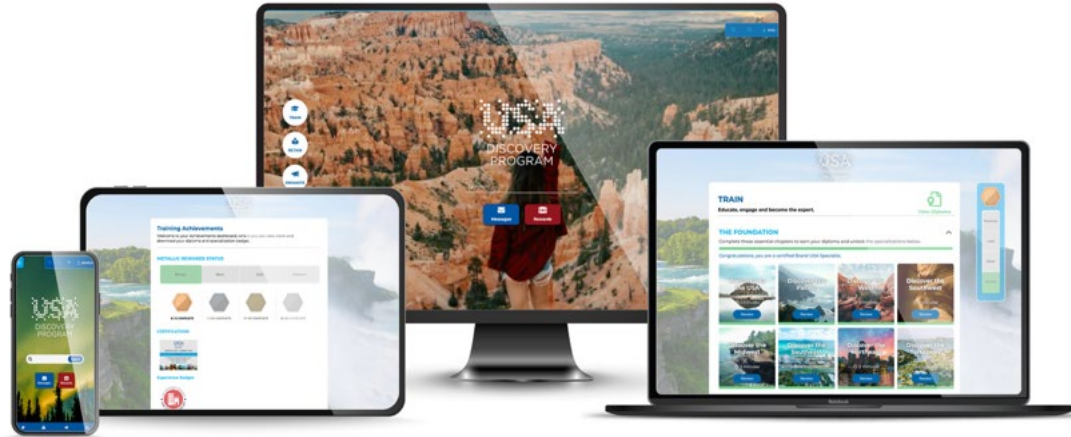
St. Louis, Missouri to Nashville, Tennessee 4 hours and 35 minutes / 497km
Nashville to Memphis, Tennessee 3 hours and 12 minutes / 341km
Memphis, Tennessee to Cleveland, Mississippi 2 hours and 1 minute / 185km
Cleveland to Natchez, Mississippi 3 hours and 13 minutes / 290km
Natchez, Mississippi to New Orleans, Louisiana 2 hours and 50 minutes / 283km



ISLAND DISCOVERY SERIES

HAWAIIAN ISLANDS

USA
Brand USA
ROAD TRIPS
USA



FY25 SCHEDULE

Missions & B2B Days



Jan 13-17

Mexico Sales Mission

Jan 19-24

India Sales & Media Mission

Feb 10-11

New Zealand Expos

Feb 13

Australia B2B

March 17-21

South America Mission

April 28-May 2

Canada Connect East

May 20-23

Canada Connect West

July 21-25

Japan & Korea
Sales Mission (TBC)

September

China Sales Mission (TBD)



FY25 SCHEDULE

Other Events

Oct. 13-19, 2024

SXSW Sydney

Oct. 21-24, 2024

Travel Week U.K. & Europe

Oct. 29-Nov. 4, 2024

South Korea MegaFam

March 24-28, 2025

Mexico Roadshow

March 23-April 4, 2025

The Great USA Road Trip
Europe

April 1-8, 2025

LATAM MegaFam

May 13-20, 2025

UK/Ireland/Europe MegaFam

May 20-22, 2025

IMEX Frankfurt

July 2025

The Great USA Road Trip
Australia

September 2025

Germany MegaFam

03

Rising Together: How to Partner with Brand USA



Brand USA

COLLABORATING TOGETHER



BRING PARTNERS TOGETHER TO MAKE A BIGGER SPLASH



**BRING PARTNERS TOGETHER
TO MAKE A BIGGER SPLASH**



**IDENTIFY FOCUSED
OBJECTIVES, MARKETS,
TIMING AND SCOPE**

**BRING PARTNERS TOGETHER
TO MAKE A BIGGER SPLASH**

**BUILD UPON ESTABLISHED
TRADE PRESENCE TO SHOW
PROXIMITY**



**IDENTIFY FOCUSED
OBJECTIVES, MARKETS,
TIMING AND SCOPE**

**BRING PARTNERS TOGETHER
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TRADE PRESENCE TO SHOW
PROXIMITY**



**IDENTIFY FOCUSED
OBJECTIVES, MARKETS,
TIMING AND SCOPE**

**LEVERAGE IDENTIFIED BRAND
USA PROGRAMMING TO
MAXIMIZE VALUE**

APPROACH

Capitalize on increasing exposure in a shared market of interest, Australia, encouraging travelers to stay longer and explore past major gateway cities within the Pacific/Western region of the USA.

RESULTS

100 % of the regional delegation maintained their participation in the group in year 2.

68% over delivery on impressions and \$300,000 of bookings.

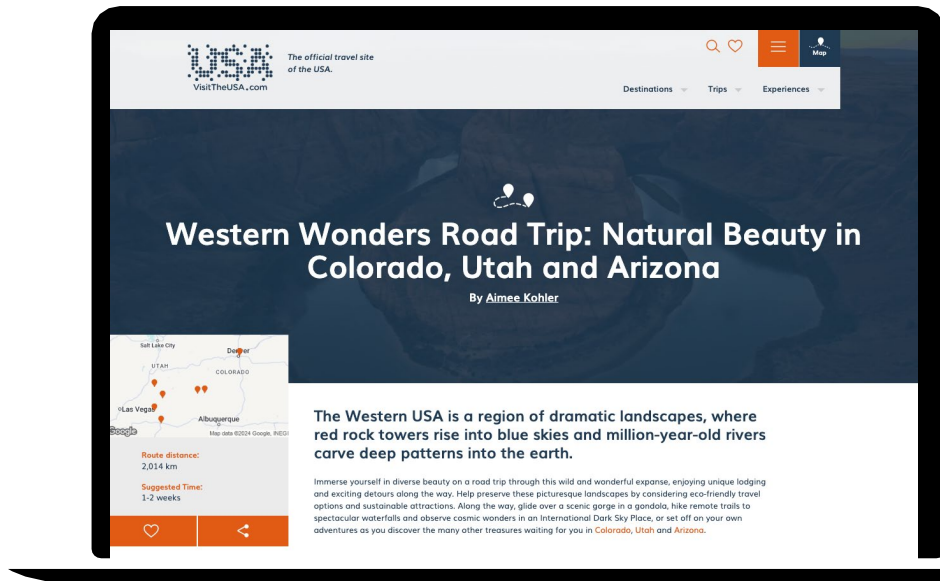
COLLABORATING PARTNERS

Travel Oregon
State Of Washington Tourism
Travel Nevada
Arizona Office of Tourism
Utah Office of Tourism
Colorado Tourism Office



Western States
Collaboration Focus:

Unified Messaging &
Combined Efforts to
Increase Awareness in
Australia





Arizona Office of Tourism and Visit Phoenix Collaboration Focus:

Combined Efforts to Increase Bookings on Seasonal Condor Flight

APPROACH

Led a State – gateway city collaboration with Condor Airlines.
Delivered joint messaging during a key planning period to
increase seasonal bookings.

RESULTS

13M impressions
7,769 attributable flight searches
+14% increase in bookings compared to year before

COLLABORATING PARTNERS

ARIZONA
THE GRAND CANYON STATE

VISIT
PHOENIX

condor 

 Kundenservice

 Deutsch

 MyCondor

Flug buchen & planen

Flug vorbereiten

Fliegen & genießen

Entdecken

Pauschalreisen

Meine Buchung

Jobportal

Condor Shop

Start » Entdecken » Flüge » USA » Phoenix



ARIZONA THE GRAND CANYON STATE VISIT PHOENIX Visit TheUSA.de

Toggle findbar

Flüge nach Phoenix

Van x Phoenix x Weiter

 <p>Hamburg-Phoenix ab 419,99* ... Jetzt buchen</p>	 <p>Stuttgart-Phoenix ab 389,99* ... Jetzt buchen</p>	 <p>Berlin-Phoenix ab 419,99* ... Jetzt buchen</p>	 <p>Direktflüge nach Phoenix, USA CONDOR </p>
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APPROACH

3 States collaborated in efforts to amp up consumer messaging during key booking periods in Australia through a USA themed event in Sydney.

RESULTS

The festival was experienced by more than 300,000 highly engaged participants.

PR: 81 Unique pieces of content was created between earned and paid with 53 Million reach.

COLLABORATING PARTNERS



**TRAVEL
OREGON**

Utah, Nevada and
Oregon Collaboration
Focus:

Event to Increase
Consumer Awareness in
Australia through SXSW
Sydney



WHAT'S ON @ USA HOUSE (Pumphouse, Sydney) Monday, 14th October

Today, USA House features Utah, Nevada and Oregon states. Pushholders are invited to join us for a free lunch and to check out our interactive experiences. End the day at USA House and enjoy happy hour entertainment with live music in the heart of the SKSW Sydney precinct.



12:00 pm - 10:00 pm

Taste of Oregon, presented by Travel Oregon

Welcome to Oregon. No matter your preference, Oregon is the premier gateway for Pacific Northwest discoveries. Oregon's stunning natural attractions, rugged Pacific coastline, snow-capped mountains, fertile valleys and wine country. [...]

[Find out More](#) | [Add to Calendar](#)

12:00 pm - 10:00 pm

Nevada Virtual Reality Road Trip Experience, presented by Travel Nevada.

Take a Drive. Find Your Vibe. Feel Alive. Cowboys and counterculture. Wildlife and wilder tales. Open roads and open hearts. Nevada's highways don't just lead you to adventure—they are the [...]

[Find out More](#) | [Add to Calendar](#)

12:00 pm - 10:00 pm

Celebrating 100 Years of Utah Film & Television, presented by Utah - Life Elevated

Discover Utah's Greatest Snow on Earth® and the Incredible Mighty 5th national parks in one location. In the winter, Utah's mountains become a playground for snow enthusiasts looking for the [...]

[Find out More](#) | [Add to Calendar](#)

12:00 pm - 2:00 pm

12:00 pm - 10:00 pm

12:00 pm - 9:00 pm

KEY TAKEAWAYS

A person is performing a handstand on a dark asphalt road that stretches into the distance. The person is wearing dark pants and a purple shirt. The background is a desert landscape with red soil and sparse vegetation, under a heavy, grey, stormy sky. The text 'KEY TAKEAWAYS' is overlaid in large white letters across the center of the image.

TOP THREE TAKEAWAYS

1

Leverage Brand USA's research and trade resources for international marketing decisions.

2

Send in your content to be featured on Brand USA owned channels.

3

Maximize impact by pooling resources, expertise and co-op with Brand USA.



THANK YOU

CONNECT WITH US

 @BRAND USA

 @BRAND USA

 @BRAND USA

 TheBrandUSA.com