

# OPEN SESSION BOARD OF DIRECTORS MEETING

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April 18, 2023 | 10 a.m. –12 p.m.



Todd Davidson  
Chair  
Brand USA Board

- Call the meeting to Order
- Approval of minutes from November 17, 2022\*

\*Vote Required



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Brand USA

# CEO REPORT



**Chris Thompson**  
President & CEO

- **Financial Report**  
Year-to-Date FY2023 Highlights
- **FY2022 Report**  
Brand USA Annual Report  
Brand USA ROI  
Brand USA Partner Survey
- **Marketing Report**  
FY2023 Objectives  
Travel Landscape & Consumer Research  
Consumer Campaign  
GoUSA TV  
Earned Media  
Partner Marketing  
Global Trade Development  
Upcoming Events  
Future Board Meetings



A logo consisting of the letters 'USA' formed by a grid of small white dots on a blue background.

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# FINANCIAL REPORT



Elliott Ferguson  
Treasurer



Donald Richardson  
Chief Financial, Diversity  
& Inclusion Officer

- FY2022 Audit
- Year-to-Date (YTD) March FY2023 Financial Update

# FY2022 Financial Statements Audit Status

- KPMG has completed the FY2022 Financial Statement Audit.
- Unmodified opinion issued by KPMG.
- No material weaknesses and no significant deficiencies in internal control were identified.
- The draft audit report was issued on January 31, 2023.
- The audit report was presented to and received by the Audit Committee on February 8, 2022.



# YTD FY2023 Financial Highlights

(As of March 31, 2023)

- **Partner Revenue**

Total partner revenues YTD were \$46.1M

- Partner Cash Contributions – We received \$27.5M
- In-Kind Contributions – We received \$18.4M
- Sponsorships and Other – We received \$0.2M

- **Expenses**

- Total Expenses YTD were \$63.1M

- **Cash Flow**

- Cash Reserves remain healthy

- **Travel Promotion Fund**

- We anticipate meeting the full normal ESTA match for FY2023 by fiscal year-end





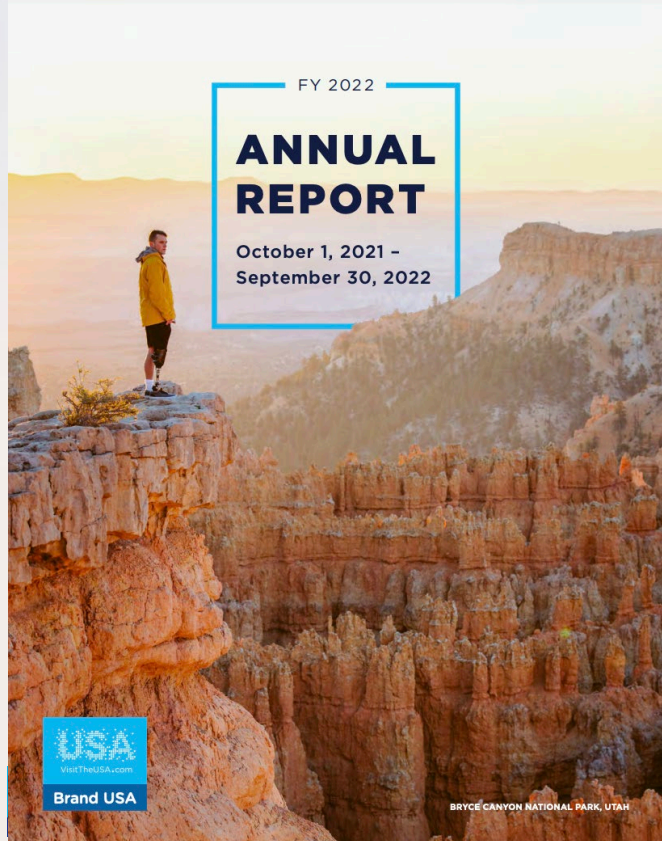
USA

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# FY2022 ANNUAL REPORT

# FY2022 Annual Report to Congress



- Transmitted by the Department of Commerce to House and Senate committees of jurisdiction
- Details Brand USA's contributions to the travel recovery from October 2021 – September 2022
- Range of topics includes:
  - State of the Industry
  - Year in Review
  - Market and Media Mix
  - Promotion of Rural and Urban Areas
  - Objectives Review
  - Financial Management
  - Company Information



# FY2022 Year in Review

## STRATEGIC FRAMEWORK

### BUSINESS GOAL

Lead the Recovery of the U.S. Travel and Tourism Industry

### MARKETING OBJECTIVES

Brand Perception, Consideration, Engagement, and Bookings

### CREATIVE PLATFORM

**UNITED STORIES**



### COMMUNICATIONS TASKS

Prove We're Ready

Welcome the World Back

Entice and Convert

### CHANNELS/TACTICS

INFLUENCERS  
OWNED PLATFORMS  
BRANDED CONTENT  
SOCIAL MEDIA

TELEVISION  
ONLINE VIDEO  
PUBLIC RELATIONS  
OUT-OF-HOME  
SPONSORED CONTENT

AIRLINES  
OTAs  
TOUR OPERATORS  
CO-OPS  
SEM

# FY2022 Objectives



OBJECTIVE	MEASURE(S)	OUTCOMES
Help the U.S. travel and tourism sector recovery by driving international visitation and spending to the United States on a market-by-market basis as conditions warrant	<ul style="list-style-type: none"><li>■ <b>MEASURE 1:</b> Inbound visitation and spending attributable to Brand USA as well as the return to the U.S. economy for each dollar spent</li><li>■ <b>MEASURE 2:</b> Value of attributable bookings driven through activation co-ops and partner programs</li><li>■ <b>MEASURE 3:</b> Tactical campaign KPIs, such as:<ul style="list-style-type: none"><li>○ Impact on sentiment about the USA and intent to visit the USA</li><li>○ Social engagements and engagement rates</li><li>○ Impressions/Cost Per Thousand (CPM)</li><li>○ Video views and video completion rate</li></ul></li></ul>	<ul style="list-style-type: none"><li>■ Attributable FY22 impacts include:<ul style="list-style-type: none"><li>○ Nearly 328,000 visits</li><li>○ \$905 million in incremental, direct visitor spending</li><li>○ \$1.9 billion in total economic impact</li><li>○ \$261 million in federal, state, and local taxes</li><li>○ Sustained 12,132 jobs earning \$563 million in personal income</li><li>○ Return on investment of marketing dollars of 11.18:1 and overall operational costs of 10.20:1</li></ul></li><li>■ Campaign KPIs:<ul style="list-style-type: none"><li>○ Markets: Australia, Brazil, Canada, Colombia, France, Germany, India, Korea, Mexico, and U.K.</li><li>○ Impressions: 3,356,645,473</li><li>○ Engagements: 14,374,807</li><li>○ Completed video views: 665,889,174</li><li>○ Video views (started): 1,425,452,612</li></ul></li></ul>

# FY2022 Objectives

OBJECTIVE	MEASURE(S)	OUTCOMES
Help U.S. travel and tourism industry stakeholders reengage international markets	<ul style="list-style-type: none"><li>■ <b>MEASURE 1:</b> Percentage of partners engaged in international promotion with Brand USA in FY2018-2019 that returned to the international market with Brand USA in FY2022</li><li>■ <b>MEASURE 2:</b> Number of markets with partners reentering through Brand USA</li><li>■ <b>MEASURE 3:</b> Representation of all parts of the country, including rural and urban areas alike</li></ul>	<ul style="list-style-type: none"><li>■ Partners engaged in international promotion with Brand USA:<ul style="list-style-type: none"><li>○ FY2019: 363</li><li>○ FY2020: 262</li><li>○ FY2021: 183</li><li>○ FY2022: 286</li></ul></li><li>■ Markets targeted by partner programs:<ul style="list-style-type: none"><li>○ FY2019: 10</li><li>○ FY2022: 7</li></ul></li><li>■ Access facilitated by Brand USA Global Marketplace<ul style="list-style-type: none"><li>○ 8,000 B2B meetings in 30 countries</li></ul></li><li>■ Market-regions accessible via International Pavilion<ul style="list-style-type: none"><li>○ Australia/New Zealand; Benelux; Brazil; France; Germany, Austria, and Switzerland; India; Ireland; Italy; Japan; Mexico; Nordic Region; South Korea; Spain; and U.K.</li></ul></li><li>■ Rural/Urban representation: Represented all parts of the country, including rural areas, urban non-gateway areas, and gateway cities (see Rural/Urban section of this report for more detail)</li></ul>

# FY2022 Objectives



OBJECTIVE	MEASURE(S)	OUTCOMES
<p>Integrate critical themes into Brand USA recovery campaign and content efforts</p>	<ul style="list-style-type: none"> <li>■ <b>MEASURE 1:</b> Integrate a multicultural marketing strategy into recovery campaign and ongoing content, digital, and event platforms</li> <li>■ <b>MEASURE 2:</b> Integrate communication of U.S. travel policies into recovery campaign and ongoing content, digital, and event platforms</li> <li>■ <b>MEASURE 3:</b> Integrate other relevant themes as warranted</li> </ul>	<ul style="list-style-type: none"> <li>■ Integrated multicultural marketing into campaigns such as influencer trips, United Stories, and GoUSA TV series like <i>Ellis Family Vacation</i>.</li> <li>■ Convened an industry consortium to conduct groundbreaking research on the incremental value of integrating multicultural assets into marketing, communications, and product offerings.</li> <li>■ In more mature markets, the multiplier effect is driven by a stronger interest in multicultural activities from experienced travelers who typically have a higher income.               <ul style="list-style-type: none"> <li>○ +46% in average spend per person per night in Canada</li> <li>○ +14% in average spend per person per night in the U.K.</li> </ul> </li> <li>■ Travel policy communications: Communicated travel policies on an ongoing basis to help consumers, stakeholders, and media navigate a rapidly evolving environment.</li> </ul>
<p>Maintain sound financial management and corporate governance</p>	<ul style="list-style-type: none"> <li>■ <b>MEASURE 1:</b> Overhead as percentage of overall budget</li> <li>■ <b>MEASURE 2:</b> Compliance with Travel Promotion Act and corporate bylaws</li> </ul>	<ul style="list-style-type: none"> <li>■ Overhead: 9% of total budget</li> <li>■ Compliance certification: Brand USA certifies it is in compliance with its competitive procurement policy, all organizational policies, and the Travel Promotion Act.</li> </ul>



A logo consisting of the letters 'USA' formed by a grid of small white dots on a blue background.

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Brand USA

FY2022 ROI



Over the past 10 years (FY13 - FY22), Brand USA's marketing efforts have generated:

**8 million**  
incremental visitors



**\$26.4 billion**  
incremental spending

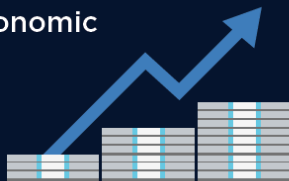


more than  
**37,000**  
incremental jobs  
supported each year

**\$7.6 billion**  
federal, state, &  
local taxes



nearly  
**\$58 billion**  
total economic  
impact







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# FY2022 Brand USA Partner Survey

# Brand USA Annual Partner Survey

**90% of respondents agree with the statement "Brand USA's partnership provides value to my organization"**

## **Objectives:**

- Partners' evaluation of Brand USA's performance:
  - Evaluation of Brand USA's programs performance
  - Evaluation of partnership value

## **Analysis:**

- 125 survey responses (40% response rate); collected between January 11 to March 8, 2022.
- Results were analyzed by type of organization (DMO/CVB and others) and amount of contribution to Brand USA.

*When notable, results are compared to surveys conducted since 2016.*



*“Brand USA helps us maximize our budget to reach important overseas markets that were previously out of reach.”*

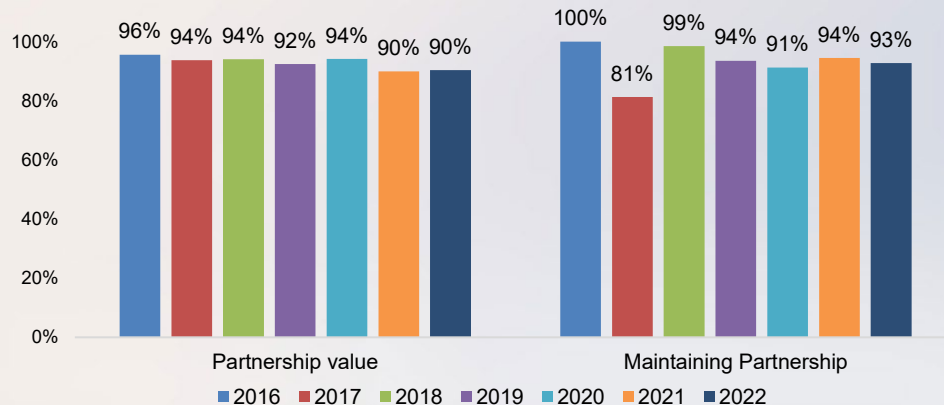
*-State DMO  
(Less than \$100,000)*

# Annual Partnership Perception and Performance

Partnership Value and Maintaining Partnership have remained over 90% ratings for the past five years.

View of the Brand USA's partnership value increased to 100% among non-DMO partners and partners contributing between \$250K and less than \$1 million, while it stayed over 90% among state and city DMOs.

**Perception of Brand USA**  
(Top 2 box – % Agree)



*“We have been working with Brand USA since its inception and have been very pleased with our international market partnership. We look forward to continuing our joined efforts with Brand USA”*

-State DMO  
(\$250K to less than \$500K)



Brand USA

# MARKETING REPORT



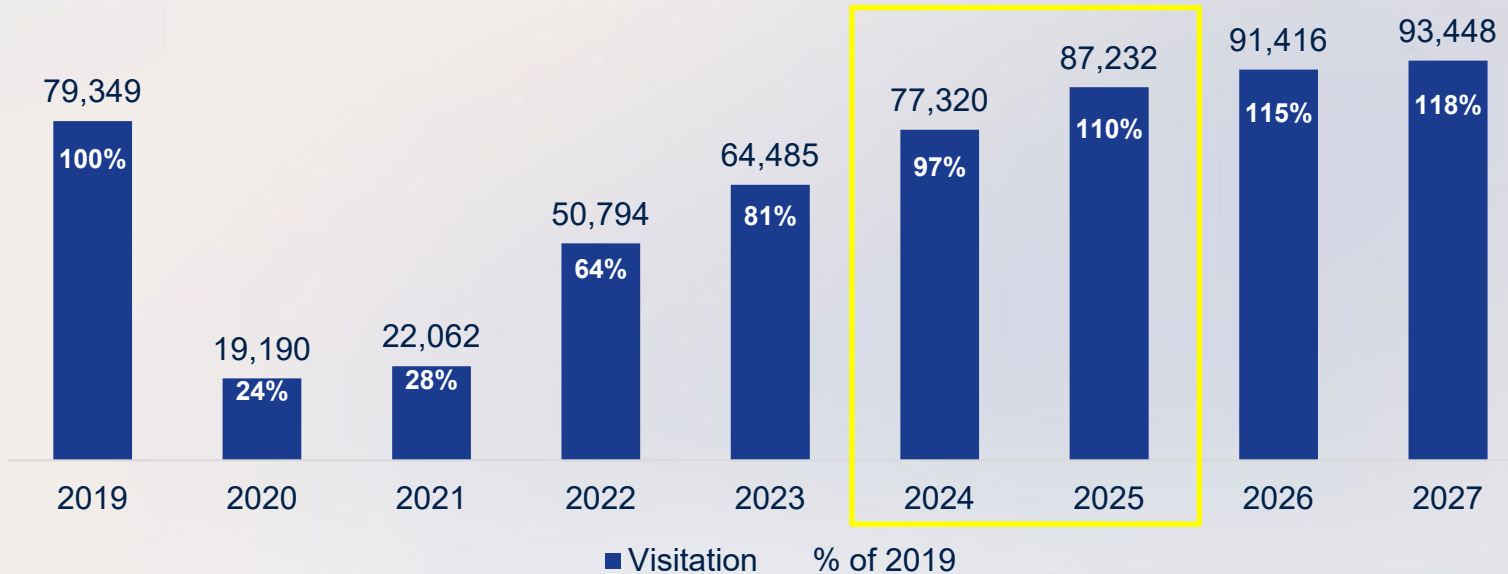
A group of diverse people, including an older man, a young girl, a woman in a 'Visit Disney World' t-shirt, and a man, are celebrating with their arms raised in excitement. They are standing in front of a large, industrial-looking structure, likely a roller coaster or ride vehicle, with yellow lights visible. The entire scene is overlaid with a dark blue semi-transparent filter.

# TRAVEL LANDSCAPE & CONSUMER RESEARCH

# USA Total Inbound Travel

Visitation to the USA is projected to return to pre-pandemic levels in 2+ years

Total Visitation to the USA and % of 2019

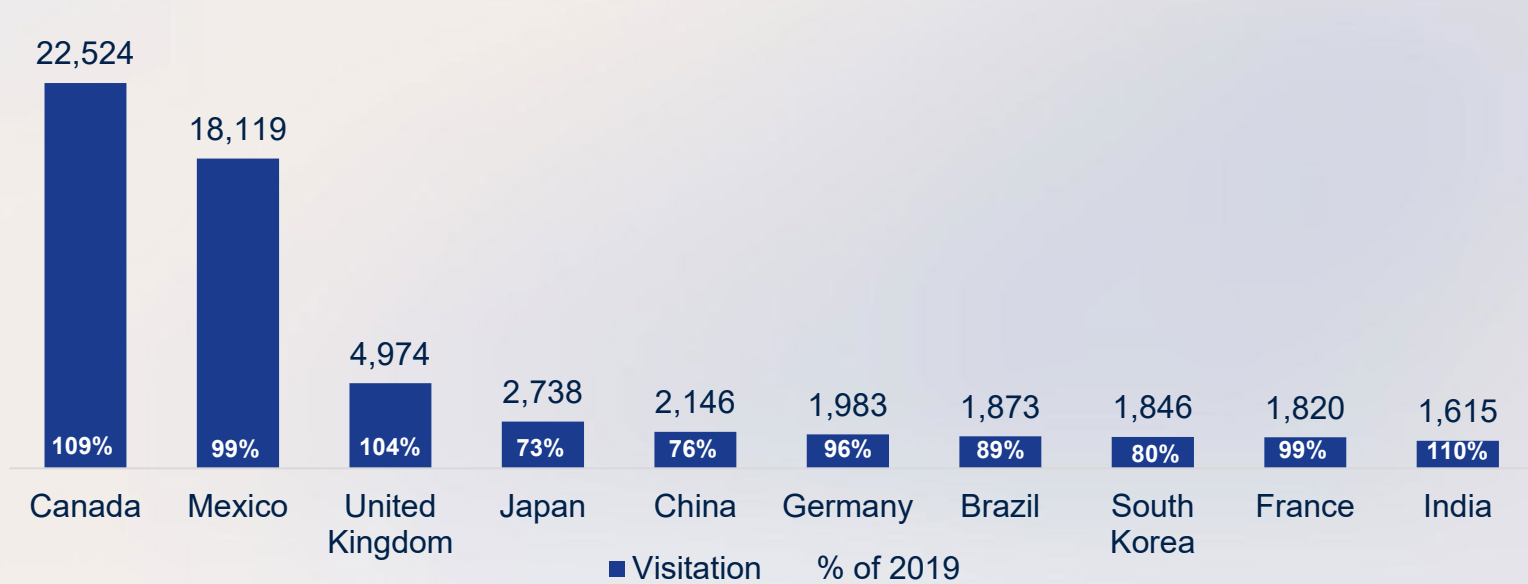




# USA Inbound Travel for 2024: Top 10 Markets

Canada, U.K., and India will lead the rebound while China, Japan, S. Korea, and Brazil will lag

Total Visitation to the USA and % of 2019

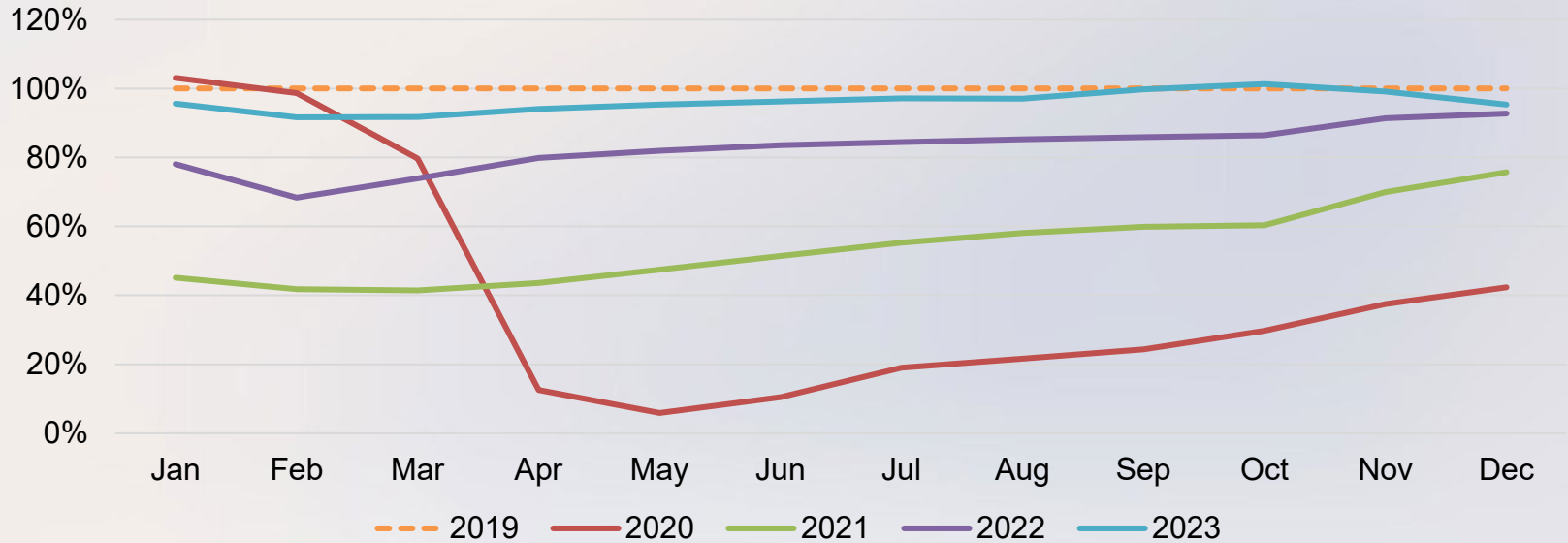


Source: Tourism Economics, as of March 27, 2023

# Operating Air Capacity to the USA

Seat capacity is projected to reach 96% of 2019 in late 2023

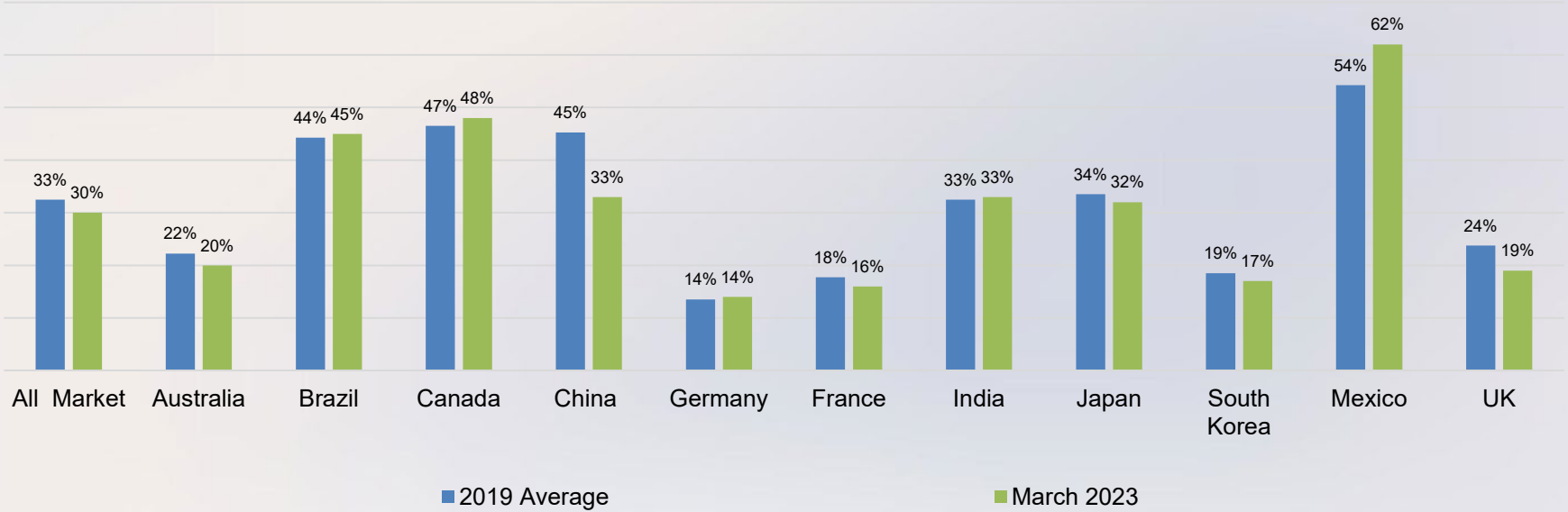
USA Total Inbound Operating Air Capacity  
% of 2019



# Likelihood to travel to USA in next 12 months

Likelihood to visit in the next 12 months is close to 2019, with slight lags.

% “Likely” or “Very likely”



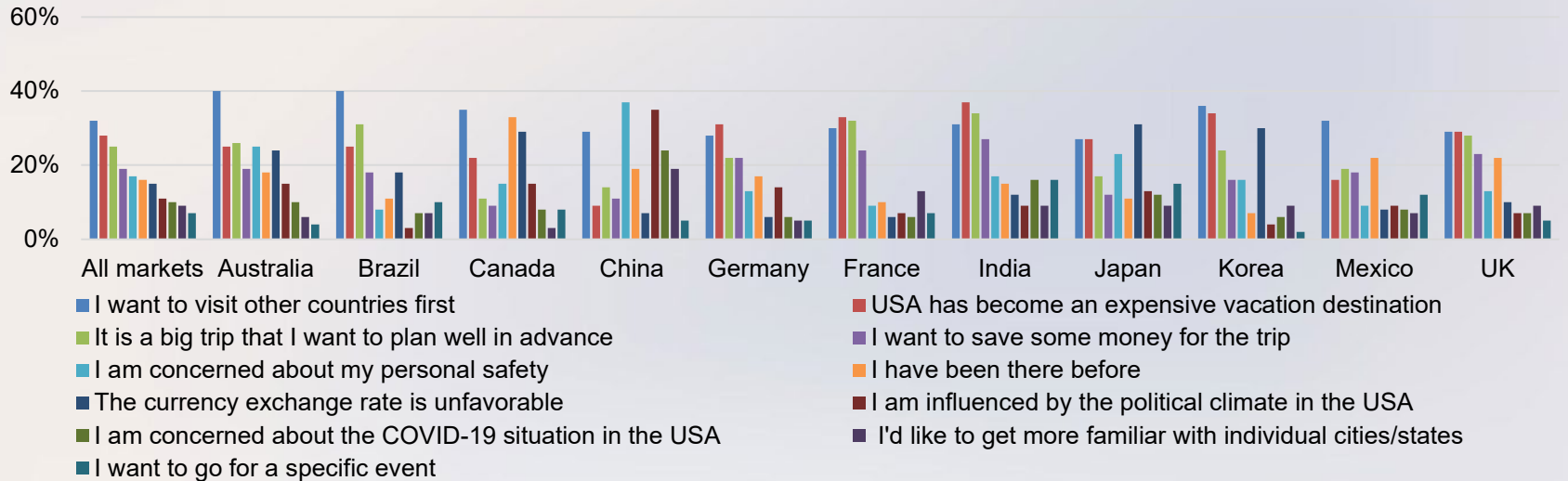
Source: Brand USA/Big Village, Quarterly Custom Study

# Barriers to USA visitation

Top barriers to U.S. Travel are:

1. The desire to experience other countries
2. Perceived high cost of a U.S. trip

Reasons for not traveling to USA in next 12 months  
(March 2023)



# Key Takeaways

- Intent to travel is high and international visitation to the U.S. is projected to return to pre-pandemic levels in the next 2+ years.
- Travelers are interested in experiencing non-U.S. destinations.
- Global competition to attract travelers is fierce. Hence, there is a strong need to maintain top-of-mind awareness of the U.S.



A woman wearing a wide-brimmed hat and a light-colored top is walking away from the camera on a dirt path. The path is flanked by a dark wooden fence. In the background, there is a large, white barn with two prominent spires, surrounded by trees and a clear sky. The entire scene is overlaid with a semi-transparent blue filter.

# MARKETING EVOLUTION



## Integrated Marketing Priorities

# United Stories: Where We've Been



**Our Strategy & Creative Platform**

**Strategy: Global Many Voices**  
Many Voices is Brand USA's communications platform which aims to create more meaningful connections with potential travelers, stimulating curiosity and wanderlust by leveraging a collection of voices to tell the story of the USA. People become the vehicle by which consumers experience a place. In 2020, we're expanding this platform to include more international voices in order to help potential visitors connect with the places and faces of our country.

**Possibilities**  
Increase destination familiarity of the United States, Territories, and Capital Region

**Proximity**  
Demonstrate the interconnectedness of the breadth and depth of possibilities of US travel

**Welcome**  
Increase positive sentiment related to US travel

**Creative Platform: United Stories**  
An inviting collection of real stories from the people and places shaped by the US.

B • USA

Brand USA Onboarding

### Where we've been

**1.0 Inventive Narratives**  
Uses central theme to guide content. Feature location, locals, for texture but no central hero of the story. Not as narrative.

**2.0 Influencer**  
Influencer becomes the hero - it's more itinerary focused, and doesn't have a central narrative.

**3.0 Someone like Me**  
Narrative is key to this story. An international visitor is the hero of the story but has a unique reason for coming to the location

B • USA

United Stories (2018 - 2021)  
Strategic Focus: Inspiration >> Proximity  
Creative Approach: highlight 'Many Voices'

## Integrated Marketing Priorities

# United Stories: Where We've Been



United Stories Recovery (2022)  
Strategic Focus: Welcoming the World  
Creative Approach: Find Your Story

# Key Research



- Nearly half (46%) of people say travel is more important to them now than it was pre-pandemic.
- The amount people travel is also increasing: 79% say they plan to take a leisure trip in the next year, up from 76% just a few months prior, with the average person saying they plan to take two leisure trips.
- 43% of consumers say their travel budget will be larger than last year.
- 1 in 2 are likely to book or have already booked an international trip in the next 12 months.





Therefore, it's more important than ever to be **top of mind** for consumers and to **raise the USA** within their **travel consideration set**.

Integrated Marketing Priorities

# Media Campaigns Aligned to Traveler Consumer Journey





## Integrated Marketing Priorities

# Media Campaigns Aligned to Traveler Consumer Journey



## Integrated Marketing Priorities

# Branding and Inspirational Layer



### Media Objective:

Drive reach and top of mind awareness

### Creative Opportunity:

Create campaign with broad USA messaging that creates a sense of urgency to visit and inspires action

## Integrated Marketing Priorities

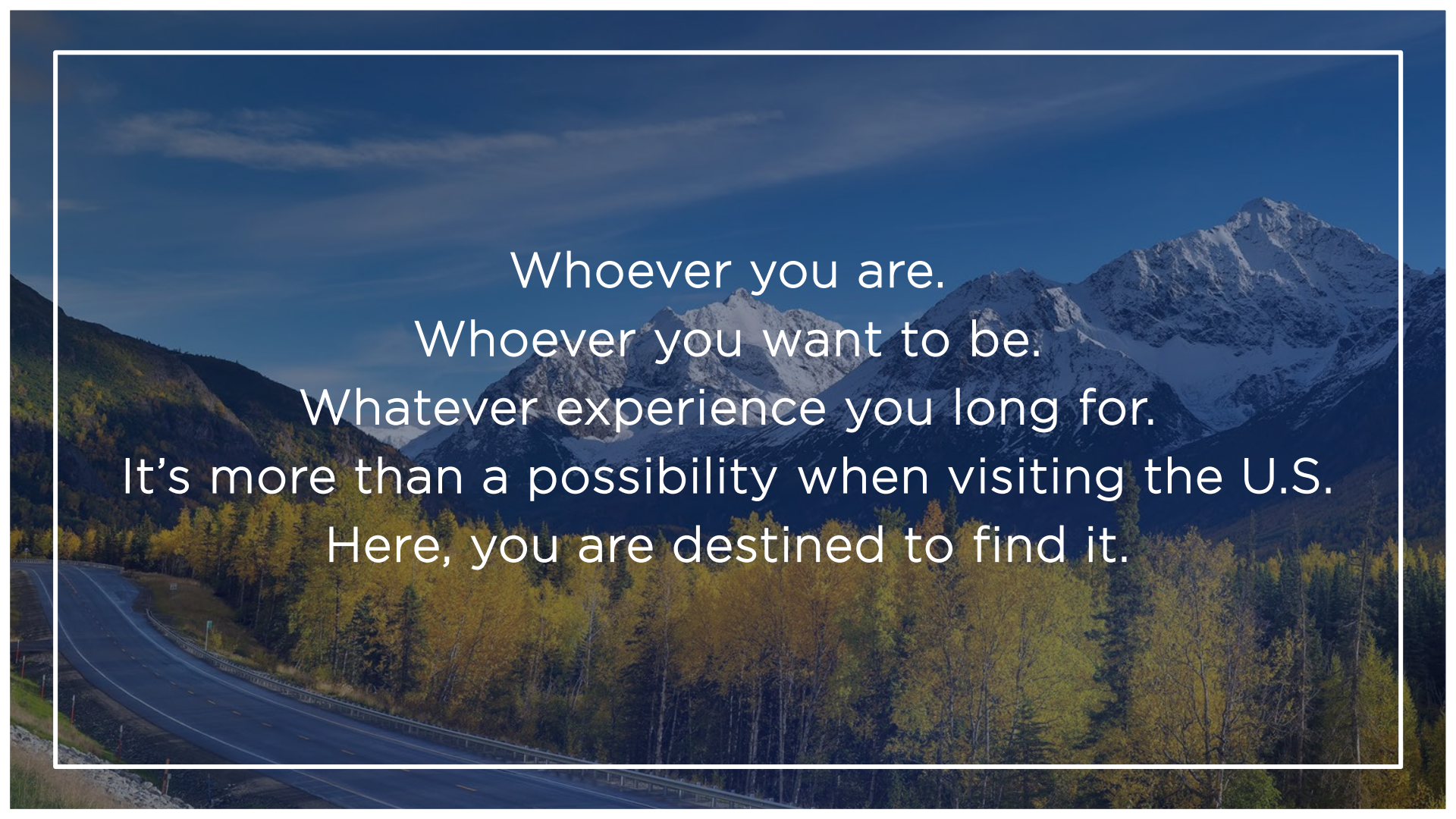
# Creative for United Stories



**Campaign Objective:** to increase consideration of the USA as a travel destination; Raise the USA in the competitor set.

**Messaging:** ASPIRATIONAL & ACTIONABLE. Lean into the pillar of Possibility and create urgency to visit ASAP.

	Motivations	Triggers	Activities
Glamorous Getaways	Treat themselves, great cities, mix of cultures. Less concern for safety	Special event - milestones	Nightlife, local restaurants, urban sightseeing, luxury
Family Time	Treat and visiting friends and relatives. Want welcoming, diverse, and safe.	A deal, a specific destination	Theme park, zoos, beach
Outdoor Enthusiasts	Reduce stress. Want something new for every visit	Destination calling	Scenery, beach, national parks
Cultural Explorers	Learn about different cultures, vibrant, unique, a place to visit again and again	Deal, destination	Cultural landmarks, urban sightseeing, historical sites, and museums
Excitement Seekers	Treat, satisfy a sense of adventure	Taking a break, milestone	Live music, outdoor activities



Whoever you are.  
Whoever you want to be.  
Whatever experience you long for.  
It's more than a possibility when visiting the U.S.  
Here, you are destined to find it.





At any moment, there's a perfect vacation out there, waiting for you.

One that's just what you need, and just what you want.

Where you reconnect with your partner under the stars of Yosemite, or find your wild side at mile 346 of Route 66. The one when you finally taste Mary Mac's mouth-watering chicken in Atlanta, or discover (and obliterate) a perfectly powdered slope in Salt Lake. The one where you play your best hand and win big in Vegas, or the one where the whole family goes, and you all stay in one tent.

Because whether you're seeking a vacation full of - love, friendship, or just some fun - adventure, tranquility or exquisite hospitality - the USA doesn't just have it all. It has nothing less than exactly what you're looking for.

That's why, when it comes to considering your next vacation,


Only the U.S. has the right to say...





This Is Where It's At.



A person and a child are seen from behind, standing on a snowy mountain slope. The person is wearing an orange jacket, dark pants, and a blue backpack. The child is wearing a blue and orange jacket and orange pants. They are both wearing helmets and ski gear. The background shows a vast, snow-covered mountain range under a clear sky, with some evergreen trees scattered across the slope.

Discover your best in the USA

## Integrated Marketing Priorities

# Dreaming and Education Layer



### Media Objective:

Increase familiarity and consideration through content.

### Creative Opportunity:

Leverage United Stories campaign to take consumers deeper into content by introducing regional, multi-state road trip itineraries.

A wide-angle landscape photograph of a canyon at sunset. The sky is a pale, hazy orange, and the sun is low on the horizon, casting a warm, golden light across the scene. The canyon walls are composed of layered, reddish-brown rock formations. In the center of the canyon, a winding road snakes through a valley filled with green vegetation. The foreground shows the edge of a rocky ledge, slightly out of focus. The text "VISIT THE USA PRESENTS" is centered in the middle of the image in a clean, white, sans-serif font.

VISIT THE USA  
PRESENTS



## Integrated Marketing Priorities

# Shopping and Education Layer



Media Objective:

Increase intent through site visitation.

Creative Opportunity:

Feature a variety of destinations that ladder up to the “This Is Where It’s At” creative for consistency and maximum impact.





This is where it's at.

📍 U.S. Virgin Islands.

LEARN MORE

USA  
VisitTheUSA.com



Hier ist  
all das  
möglich.

📍 Tauchen Sie ins exklusivste Spa  
der Natur ein, den dampfend  
heißen Quellen von Idaho.

USA  
VisitTheUSA.de



这就是  
魅力所  
在

📍 Breckenridge, Colorado.

了解更多

USA  
GoUSA.cn



바로 여기에서 즐겨보세요.

📍 Savannah, Georgia.

USA  
GoUSA.or.kr

더 알아보세요

## Integrated Marketing Priorities

# Media Flighting Summary for Remainder of Year



Based on research and verified with local insights, heavy-up windows per country have been identified for branding and dreaming campaigns, whereas shopping is evergreen

	April	May	June	July	August	September
Canada						
Mexico						
U.K.						
Australia						
France						
Germany						
India						
Brazil						
Colombia						
Korea						

Integrated Marketing Priorities

# What's next?

In-Market Research

+

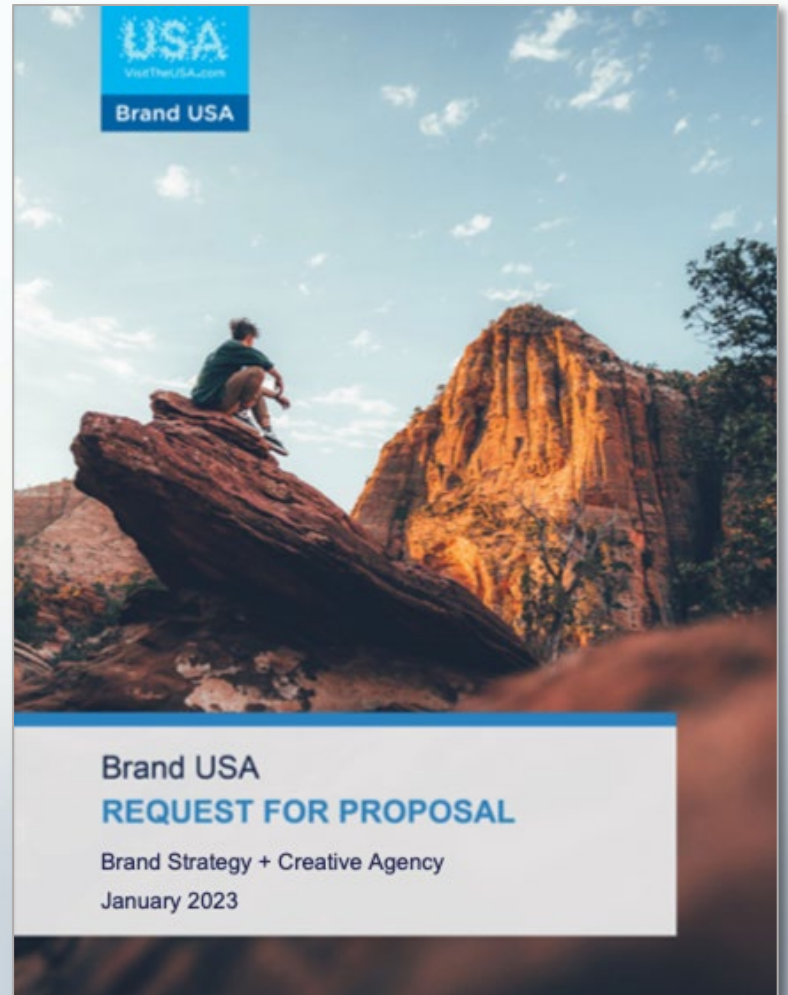
Brand Strategy

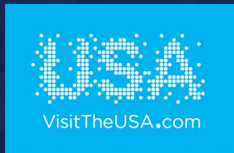
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Creative Refresh

+

Storytelling Initiatives





Brand USA

# GoUSA TV



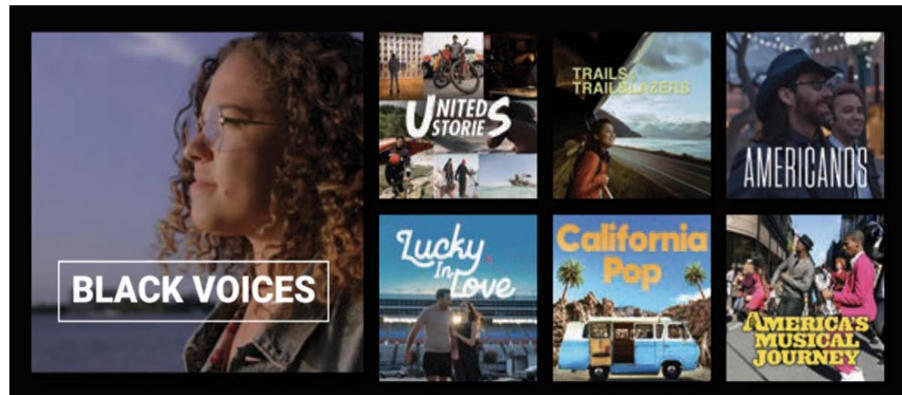
### Platforms Added in FY2023:

MX Player & Rlaxx

Samsung TV Plus Nordics - LG Nordics

### Total Reach:

804M+ across all platforms





**+10%**

MoM Avg Growth  
(March '22 – Feb '23)

**+200%**

January '23 YoY

**+181%**

February '23 YoY

Ellis Family Vacation – Live April 2023

Featured Destinations in the Series:

- Washington, D.C.
- Birmingham, Alabama
- Grand Canyon, Arizona
- New Orleans, Louisiana

# ELLIS FAMILY VACATION





Go  
USA

Watch Free

A logo consisting of the letters 'USA' formed by a grid of small white dots on a blue square background.

USA

[VisitTheUSA.com](http://VisitTheUSA.com)

Brand USA

A large, semi-transparent world map is centered on the slide. The map is overlaid with a collage of numerous small, rectangular photographs showing various scenes of people, landscapes, and cityscapes. The entire background is a dark blue gradient.

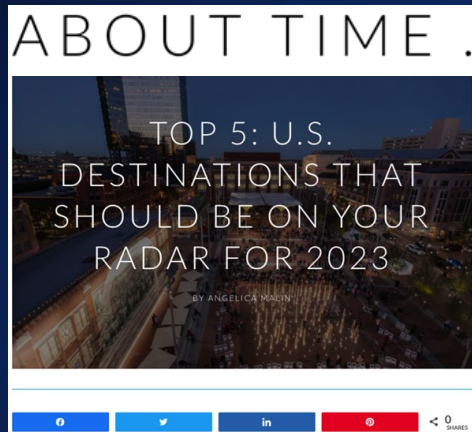
EARNED MEDIA



## Earned Media Results

- Over 70 pieces of international coverage following the distribution of the global release on hidden gems across the USA
- The *'What to see and do'* document has generated coverage on hotel openings, new museums and attractions as well as anniversaries in global titles
- Continuing to support Brand USA's DEI initiatives through our domestic and international storytelling

# Coverage Highlights



From Rhode Island's mesmerising Gilded Age mansions, to Charleston's secret gardens, and cowboy charm in Fort Worth, [Visit The USA](#) spotlights five destinations that should be on your radar for 2023.

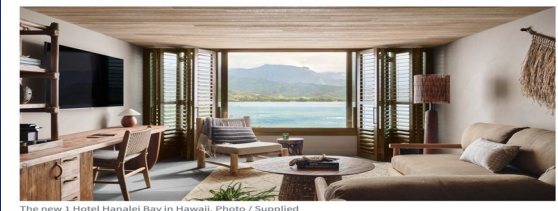
[1. Rhode Island: Explore the Stunning Beauty of the U.S.' Smallest State](#)



[nzherald.co.nz](https://www.nzherald.co.nz)



## Now and the wow: Latest trends in travel



If Kauai, Hawaii is on your wish list, make it extra special with a stay at 1 Hotel Hanalei Bay. Opening mid-February, it's the latest world-class wellness resort to hit Kauai's North Shore. Enjoy a personalised programme of fitness and nutrition, relax by the pool and keep an eye out for Fido on a lilo - dogs are welcome too. See [1hotels.com/hanalei-bay](https://1hotels.com/hanalei-bay)

# Coverage Highlights

TRAVEL  
PULSE



*Liz Bittner, President & CEO – Travel South USA. (photo courtesy of Travel South USA)*

## **Liz Bittner, president and chief executive officer for Travel South USA**

Liz Bittner heads the oldest and largest regional destination marketing alliance in the United States. Travel South USA is a 12-state organization owned by the state tourism offices of Alabama, Arkansas, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, South Carolina, Tennessee, Virginia and West Virginia.

Bittner's role not only involves on-the-ground work in the 12 states she represents, but also includes managing offices and marketing programs in far-flung locations around the globe—from Australia and New Zealand to Europe, Brazil, and Canada.

## escapism



i

## **33 brilliant new reasons to take a holiday in the US, with New York City breaks and national parks**

Rail adventures, desert glamping and markers of the country's musical legacy are among the highlights – from Florida to Alaska  
**Rappers' delights**

It was 50 years ago that DJ Kool Herc – known as the father of hip-hop – first invented the “break beat” at a house party in The Bronx. That innovation became a foundation for the musical genre and its birthday is being marked with events across the States, including “Fresh, Fly, and Fabulous: Fifty Years of Hip Hop Style”, a celebratory exhibition at New York City's The Museum at FIT. [fitnyc.edu](https://fitnyc.edu)

## **Black history landmark**

On 27 June, the \$120m International African American Museum will open at Charleston's Gadsden's Wharf in South Carolina, where an estimated 100,000 enslaved people arrived. The museum is dedicated to African American histories, cultures and experiences, covering slavery, the Civil Rights movement and the Great Migration, and includes a genealogy library. [iaamuseum.org](https://iaamuseum.org)

USA

Brand USA

## What's Next?

- International group press trips (U.K., Mexico, Italy) encapsulating the storytelling pillars
- More targeted engagement with global media at IPW, focused on relationship building with consumer media and interviews / profile pieces for Brand USA senior representatives and our partners with trade and consumer publications
- International media missions to help better shape the narrative of the stories of the USA and position Brand USA as tourism leaders and innovators



The logo consists of the letters 'USA' in a white, pixelated font, set against a solid blue square background.

VisitTheUSA.com

Brand USA

The background image shows two mountain bikers riding on a dirt trail. The biker in the foreground is wearing a yellow and black jersey and a helmet. The biker in the background is wearing a red and black jersey and a helmet. The trail is set in a rugged, hilly landscape with a river winding through the valley in the distance. The entire image has a blue tint and is framed by a white border.

# PARTNER MARKETING

# FY2023 Partner Participation Overview

As of March 31, 2023



1,011

TOTAL  
PARTNER  
PARTICIPATIONS\*



259

ACTIVE  
PARTNERS\*\*



3.34

AVERAGE  
PARTICIPATIONS  
PER PARTNER\*\*



53

UNIQUE  
PROGRAMS  
AVAILABLE

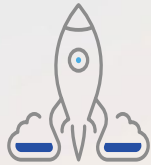


7

FIRST TIME  
CONTRIBUTORS/  
PARTICIPANTS

# FY2023 Program Overview

As of March 31, 2023



396

CAMPAIGNS  
LAUNCHED\*



737M+

IMPRESSIONS  
DELIVERED\*\*




19

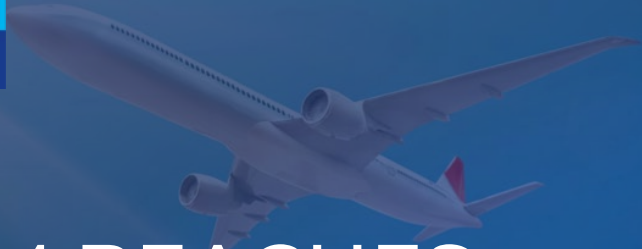
MARKETS WHERE  
CAMPAIGNS RAN\*



\$9M+

ATTRIBUTABLE  
BOOKINGS  
MEASURED\*\*\*

 \* includes General Media participations, Affinity programs, custom programs, Partner Marketing Programs, Trade activities  
\*\* includes custom programs and Partner Marketing Programs  
\*\*\* includes Multi-Channel campaigns and ITG campaigns



# SPOTLIGHT: PALM BEACHES CANADA CAMPAIGN



# Custom Canada Campaign: Palm Beaches

## Campaign Overview



Discover the Palm Beaches partnered with Brand USA and Air Canada to run an integrated marketing campaign targeting winter travelers in Toronto.

All campaign media utilized Air Canada as the call to action to book a flight to PBI.

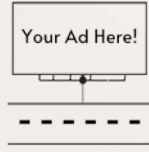
# Custom Canada Campaign: Palm Beaches

## Promotional Elements



### OUT OF HOME: CARVERTISE

- Carvertise**
- Out of home advertising with wrapped Uber, Lyft, & DoorDash vehicles
  - Partial wrap on 30 cars with swarms at 4 major Toronto events
  - 12-week campaign



### OUT OF HOME: SIGNAGE

- Outfront Media**
- Out of home campaign featuring static and digital signage throughout Toronto
  - 17-week campaign



### AIRLINE SUPPORT

- Air Canada Sponsorship**
- Airline tickets for Rogers contest
  - Aircanada.com carousel banners and landing page
  - Deals of the Week email ads
  - Social posts on Facebook and Instagram



### TV

- Rogers Media CityTV & Morning News Show**
- 3 days of Live on Location with Breakfast Television
  - 3 days of contest on-air giveaways for a trip to Palm Beaches
  - 9-week TV campaign on CityTV



### PROGRAMMATIC

- Programmatic**
- Brand USA's programmatic marketing platform with behavioral, demographic, & geographic targeting
  - 8-week campaign

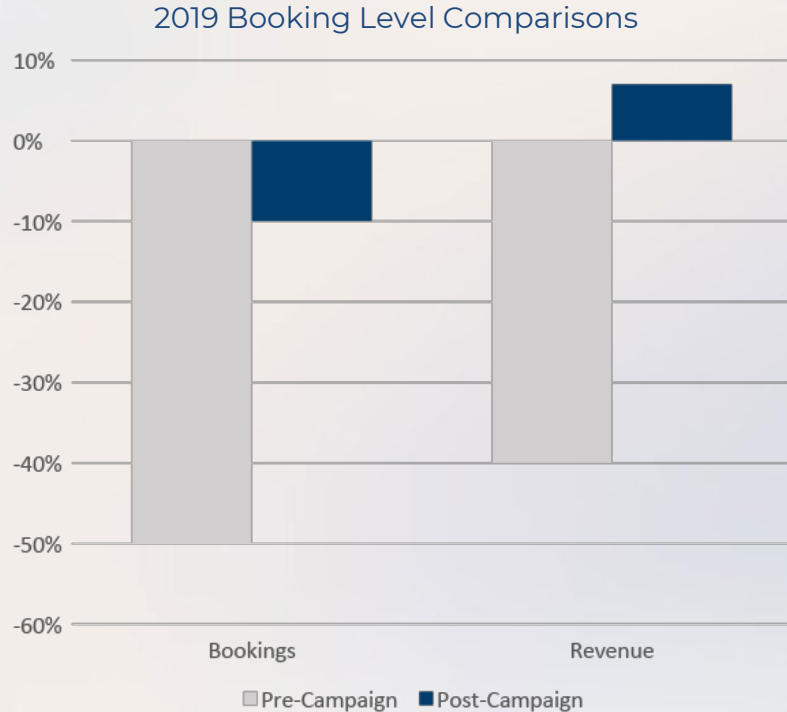
# Custom Canada Campaign: Palm Beaches

Final results

CAMPAIGN PERIOD	CAMPAIGN VALUE	VALUE
September 2022 – February 2023	\$904,350	2.7:1

VENDOR	MARKET	IN MARKET DATES	IMPRESSIONS
Rogers Media	Toronto	October 19 – December 18	8,316,000
Programmatic Campaign		November 9 – January 8	8,835,822
Outfront Media		October 17 – December 18	160,477,343
Carvertise		October 17 – January 8	20,415,904
Air Canada	Canada	September 26 – December 18	22,614,815
		<b>TOTAL IMPRESSIONS</b>	<b>220,659,884</b>

# Custom Canada Campaign: Palm Beaches



Discover Palm Beaches' campaign successfully moved the needle for Air Canada Bookings to PBI.

Comparing to 2019 booking levels, Air Canada PBI flights were down -50% in bookings and -40% in revenue.

The campaign resulted in growing bookings to -10% compared to 2019 levels and revenue increased +7% above 2019 levels.



# FY2024 Partner Marketing Priorities

Connecting the Dots



Targeted media distribution



Regional + multi-partner strategies

In-market collaboration

Consumer campaign integrations

Partner resource center build



A blue square containing the letters 'USA' in a white, pixelated font.

USA

[VisitTheUSA.com](http://VisitTheUSA.com)

Brand USA

The title 'GLOBAL TRADE DEVELOPMENT' is centered in a large, white, sans-serif font. The background is a dark blue gradient with silhouettes of business people shaking hands and various data charts and graphs overlaid.

# GLOBAL TRADE DEVELOPMENT

# Sales Missions

## 4 Regional Markets

- Mexico (Jan.-Feb.)
- Australia (B2B in Feb.)
- India (March)
- South America (March)

**114** U.S. partners

**6,499** meetings

**9** cities

**439** Trade Attendees

**17** Trade Media publications

**1,024** Agents Trained





BRAND USA SALES MISSION MEXICO 2023  
HOST CITIES: MEXICO CITY  
AND GUADALAJARA



# Travel Trade Engagement & Training

## In-person trade events:

- **47** events
- **5,885** travel trade attendees

## Webinars:

- **24** webinars
- **2,559** agents



# Travel Trade Joint Campaigns



# First European MegaFam in Partnership with American Airlines

- 60 top-selling agents
- 19 destinations
- Finale in Fort Worth, Texas
- Six itineraries across nine markets:  
Austria, Belgium, France, Germany, Ireland, Italy, Netherlands, Switzerland, and the U.K.





# Brand USA U.K. & Europe MegaFam 2022

IN PARTNERSHIP WITH





# Looking Forward FY2023

## 2 MegaFams

- U.K. and Ireland (April)
- Australia and New Zealand (June)

## 10 Roadshows

- Brazil – four cities
- Canada – six cities

## 2 Special Events

- Luna Cinema Project U.K.
- RHS Hampton Court Garden Festival



USA

VisitTheUSA.com

Brand USA

# EVENTS



USA

Brand USA





**IPW**<sup>®</sup>

**SAN ANTONIO**  
MAY 20-24, 2023

POWERED BY U.S. TRAVEL ASSOCIATION



# Objectives

1. Position Brand USA as the go-to resource for all things international travel
2. Create an atmosphere conducive to doing business
3. Increase investment into promoting and selling the USA in international markets
4. Drive upbeat coverage of the USA and Brand USA
5. Convey organizational, industry, and policy information to our 360° world of stakeholders



## Trade

Provide information, resources, and programs to expand USA offerings, promotions, and partnerships

## Partners

Provide information, resources, and programs for partners to increase presence and focus in international markets

## Media

Provide information and resources to enhance coverage and expand Brand USA's media relationships

## Government / U.S. Travel

Provide a platform for government agencies and their principals, and contribute to the overall success of the show



# Engagement and Activation Points

## All Audiences

- Brand USA Booth
- Brand USA Monday Lunch
- Brand USA Talks Travel Live Recording
- Branding Throughout Convention Center

## Travel Trade

- Trade Appointments
- Chairman's Circle Honors
- Networking and Evening Events

## U.S. Industry Partners

- Partner Meetings
- Sunday Education Session
- Networking and Evening Events

## Media

- Media Happy Hour
- Press Conference
- Media Marketplace Appointments
- Other Media Interviews
- Press Brunch
- Travel Writers Awards
- Networking and Evening Events

## Government/Other Stakeholders

- Federal Row
- Ribbon Cuttings
- USCS T&T Team Meeting
- U.S. Travel Communications Committee Meeting
- VIP Floor Tour



Brand USA ✓  
@BrandUSA

Get a peek behind the scenes of our [#BrandUSATalksTravel](#) podcast episode, recorded live at [#ipw22](#). Interested in witnessing the action in person? Stop by the [#BrandUSA](#) pavilion today and tomorrow to check it out. See you then!

Listen here: [▶ apple.co/3zhHfjJ](https://apple.co/3zhHfjJ)





TOGETHER, WE'RE MEETING IN THE USA



Brand USA

WELCOME TO



Brand USA



FRANKFURT  
23-25 MAY 2023



Registration closed; waitlisting

# BRAND USA TRAVEL WEEK



Brand USA

U.K. & EUROPE 2023



**OCTOBER 16-19, 2023**  
etc. venues County Hall | London



# BRAND USA TRAVEL WEEK



U.K. & EUROPE 2023

# BRAND USA MEDIA FORUM



U.K. & EUROPE 2023

# BRAND USA CEO SUMMIT



U.K. & EUROPE 2023

**OCTOBER 16 – 19**

**OCTOBER 16 – 18**

**OCTOBER 16 – 17**

## REGISTERED ATTENDEES & TARGETS

**105** Exhibitor Appointment Books  
**12** RTOs

**45** Exhibitor Appointment Books

**50** CEOs

**155** Buyer Organizations

**65** Pan-European Media

**25** Pan-European Media

2023

SUMMER

Boston, MA | JULY 26

FALL

Washington, DC | NOVEMBER 15

Future Dates

Board of Directors 2023 Meetings





# Questions & Answers

USA  
VisitUSA.gov

Brand USA

USA

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CONSUMER

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GoUSA TV

TRAVEL INDUSTRY

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Thank You