



# FY2016 Objectives, Summary Marketing Plan, & Budget

As of August 1, 2015

## ABOUT THIS PLAN

As required by U.S. Code § 2131, the Travel Promotion Act, and as amended the Travel Promotion, Enhancement, and Modernization Act of 2014, Brand USA submits this plan to the Secretary of Commerce on August 1, 2015.

Included within these pages are:

- The annual objectives Brand USA has established for fiscal year 2016 (FY2016) subject to approval by the Secretary of Commerce (after consultation with the Secretary of Homeland Security and the Secretary of State).
- The FY2016 summary marketing plan in support of the achievement of these objectives.
- The FY2016 budget, including an explanation of any expenditure provided for by the budget in excess of \$500,000 for the fiscal year.

This plan is also posted on our corporate website, [TheBrandUSA.com](http://TheBrandUSA.com).

On October 1, 2015, Brand USA will publish its full FY2016 business plan, which will include more detail about its marketing platforms, programs, and initiatives to support the objectives, goals, and strategies included in this summary plan.



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# About Brand USA

**Brand USA is the destination marketing organization for the United States with the mission of increasing incremental international visitation, spend and market share to fuel the nation's economy and enhance the image of the USA worldwide.**

Established by the Travel Promotion Act as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and communicate U.S. travel policies, Brand USA began operations in May 2011.

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Brand USA works in close partnership with more than 500 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

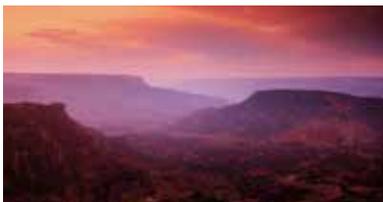
In May 2012, Brand USA launched its first campaign, which invited the world to "Discover This Land, Like Never Before." The inaugural campaign premiered in Canada, Japan, and the United Kingdom. Since then, Brand USA has expanded its marketing effort to reach international travelers in more than 30 markets.

Now entering its fifth full year of operations, Brand USA's economic impact has been significant. In fact, according to studies by Oxford Economics, in the past two years alone, Brand USA's marketing initiatives are responsible for welcoming more than 2 million incremental visitors to the United States and generating \$6.5 billion in additional visitor spending, which has fueled the U.S. economy by generating nearly \$15 billion in business sales, \$7.2 billion in GDP, more than \$4 billion in personal income, and \$1.9 billion in federal, local and state tax revenues. In addition, the program has supported an average of 50,000 incremental U.S. jobs per year.

Brand USA's operations are supported by a combination of non-Federal contributions from destinations, travel brands and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

For industry or partner information about Brand USA, please visit [www.TheBrandUSA.com](http://www.TheBrandUSA.com).

For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at [www.DiscoverAmerica.com](http://www.DiscoverAmerica.com).



## STATEMENT OF PURPOSE, MISSION, AND VISION

As Brand USA began fiscal year 2015, we revisited and revised our mission and vision statements by developing a broader, more encompassing statement that better reflects our purpose as the destination marketing organization for the United States.

Five strategic principles are at the core of our new statement:

- Create Innovative Marketing
- Add & Create Value
- Market the Welcome
- Drive Results
- Build & Maintain Trust

These foundational elements serve as constant points of reference on how we will build upon the effectiveness of our overall destination marketing strategies. Inclusive of our mission and vision statements, our Statement of Purpose is an enduring declaration of Brand USA's reason for being and how we will accomplish our ultimate objectives and goals.

### STATEMENT OF PURPOSE: FOUNDATIONAL ELEMENTS



## STATEMENT OF PURPOSE

**Our vision** is to be the best in class national destination marketing organization - earning the USA the largest share of the global travel market and significantly contributing to job creation, GDP, export growth and tax revenues.

**Our mission** is to increase incremental international visitation, spend and market share to fuel our nation's economy and enhance the image of the USA worldwide.

We will realize our vision and accomplish our mission by staying true to these foundational elements:

- **Create Innovative Marketing**  
**Promote the entirety of the USA** with innovative marketing that supports all 50 states, the District of Columbia and five territories to, through, and beyond the gateways.
- **Market the Welcome**  
**Inspire, welcome and thank travelers** while accurately communicating vital and compelling information about visa and entry policies.
- **Build & Maintain Trust**  
**Build and maintain trusted relationships with stakeholders worldwide** through inclusive, proactive and transparent outreach with a commitment to compliance and integrity through words, actions and results.
- **Add & Create Value**  
**Add and create value** by pioneering cooperative marketing platforms and programs that leverage and grow the USA brand in ways our partners would be challenged or unable to do on their own.
- **Drive Results**  
**Maximize and optimize the return on investment of Brand USA's resources** by deploying the right messages, through the right channels, in the right markets, at the right times and at the right levels of investment.

While specific objectives, goals, strategies and measures will be developed on an annual basis to successfully realize our purpose, these elements establish the foundation for all we do. As we track our progress in pursuit of this purpose, the true measure of our success will be the degree by which we create sustainable funding sources and meet our responsibility to drive significant, year-over-year increases in incremental international visitation, spend and market share and our country benefits in economic prosperity and growth as a result of our efforts. We will build upon the effectiveness of our overall destination marketing strategies by leveraging the strength of Federal resources, including embassies and consulates, worldwide.

## 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 influence 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 efforts of Brand USA, the U.S. Department of Commerce led 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 U.S. citizens.

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



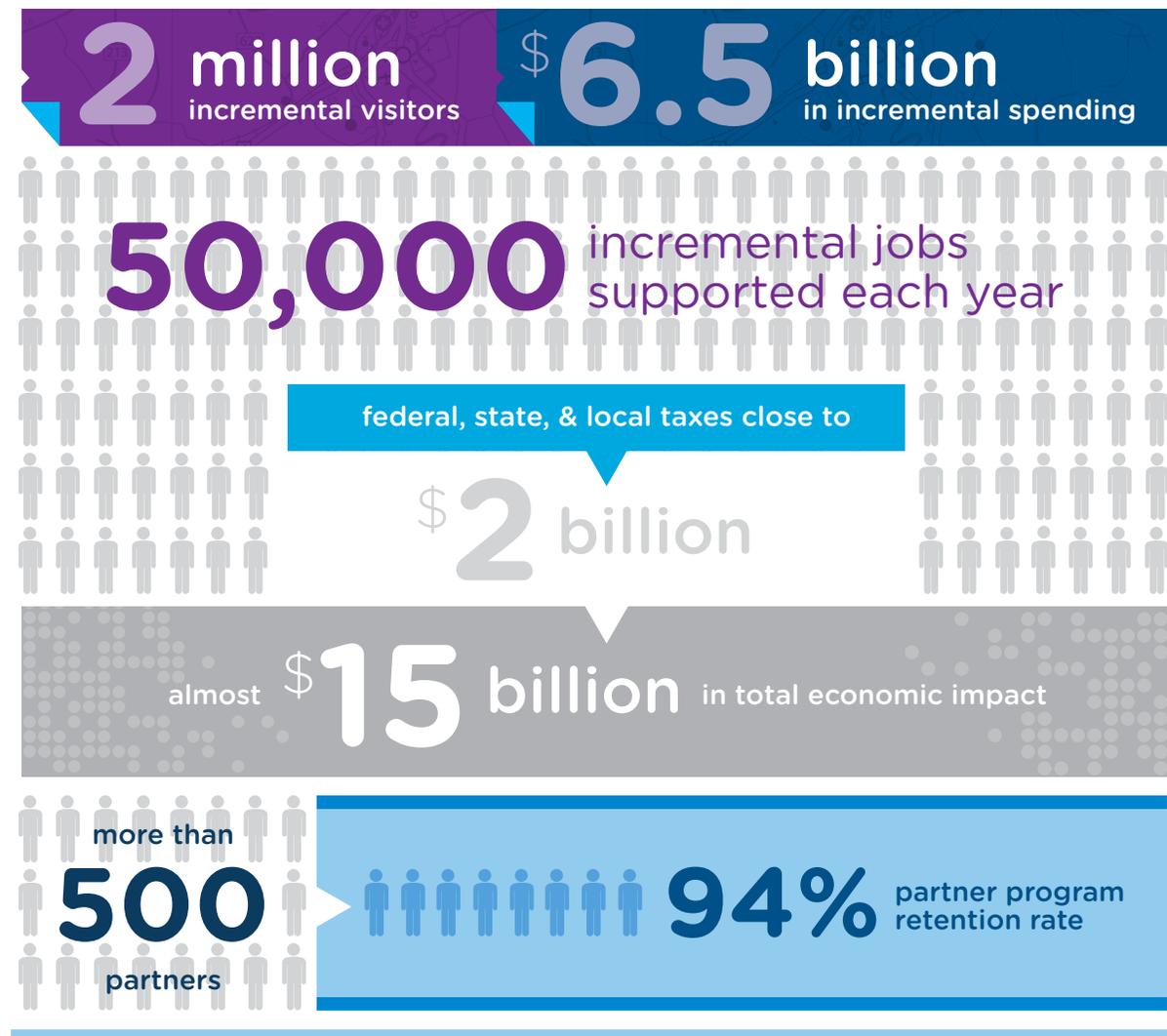
## HIGHLIGHTS OF ACTIVITIES & SUCCESSES

Brand USA has made continued progress toward its mission of increasing international visitation to the United States since inception. Highlights include:

### Visitation, Spend, Market Share

- From 2013 through 2014, Brand USA's marketing initiatives have helped welcome more than 2 million incremental visitors to the United States, which generated \$6.5 billion in additional visitor spending. These additional visitors and the money they spend during their travels have fueled our economy by generating nearly \$15 billion in business sales, \$7.2 billion in GDP, more than \$4 billion in personal income, and \$1.9 billion in federal, local and state tax revenues. And the program has supported an average of 50,000 incremental U.S. jobs per year.
- An increase in the United States' share of total international travel from 6.4% in 2013 to 6.6% in 2014 (Source: The World Tourism Organization/UNWTO).

OVER THE PAST TWO YEARS, BRAND USA'S MARKETING EFFORTS HAVE GENERATED:



Sources: ROI data provided by Oxford Economics.

Partner and partner program retention data provided by Brand USA internal reporting.

## Marketing Effectiveness

- A 3.8% increase in the number of “net promoters” of the USA across Brand USA’s primary target markets (Australia, Brazil, Canada, China, France, Germany, India, Japan, South Korea, Mexico, and the United Kingdom)—from 45.8% in 2013 to 47.6% in 2014. Net promoters are defined as those who selected “I would bring [the USA] up to recommend as a destination” in a quantitative survey conducted by PhoCusWright.
- A 6% increase in the percentage of campaign recognizers who indicated they will “definitely” or “probably” visit the United States in the next six to 12 months—from 60% in 2013 to 64% in 2014.
- Continued strong and positive social sentiment of 89% across all of Brand USA’s digital channels based on informal monitoring. Visible was selected in the RFP process for an advanced social monitoring tool and is currently being configured.

## Partnerships and Contributions Growth

- Cash contributions totaling \$34 million, comprising 31% of total contributions.
- In-kind contributions totaling \$75 million, comprising 69% of total contributions.
- A five-fold increase in our partnership network—from 89 partners in FY2012 to 339 in 2013 to 475 through 2014 and more than 500 to date.
- Quadrupled the number of partner programs from 25 in FY2012 (the year prior to this arrival) to more than 100 programs with 200 opportunities.
- A 94% partner program retention rate as measured by the number of partners participating in Brand USA co-op programs in consecutive years.

## Marketing Reach

- Expanded the USA consumer campaign from three markets in 2012 to 14 key markets that generate more than 80% of all international visitation to the United States.
- Tripled international representation from four offices (covering seven markets) in 2012 to 12 offices covering 20 markets, including Australia, Austria, Brazil, Canada, China, Costa Rica, Germany, Guatemala, Hong Kong, India, Ireland, Japan, Mexico, Nicaragua, New Zealand, Panama, South Korea, Switzerland, Taiwan, and the United Kingdom.
- Tripled Brand USA’s international marketing presence (defined as markets with at least two Brand USA marketing initiatives in country) from 10 in 2012 to more than 30 today.
- Increased the number of markets where Brand USA is fully deployed (with its USA consumer marketing campaign, co-op marketing initiatives, and trade outreach) from two markets in FY2012 (Japan and the United Kingdom) to 11 markets through 2014.



# Situation Analysis

## GLOBAL PERSPECTIVE

### SHORT-TERM CONVERGENCE OF ECONOMIC GROWTH

Since the dawn of this century, emerging markets have charged forward, elevating millions of people into middle-class lifestyles and transforming global consumption patterns. Despite media headlines warning of China's slowdown and Brazil's general economic gridlock over the next decade, emerging markets will continue to grow faster than advanced economies. In the near term, however, normalization will dampen overheated markets such as China and boost recession-plagued European markets like Spain that are finally regaining positive momentum.

Predictions for total global GDP growth remain relatively flat for 2015. The International Monetary Fund (IMF) predicts global GDP to reach 3.5% this year (see Chart 1), changing little from 2013 (3.4%) and 2014 (3.4%). The consistency is only on the surface, however, as many individual countries are shifting significantly. Advanced economies accelerated from 1.4% in 2013 to 1.8% in 2014 and are projected to reach 2.4% in 2015 while emerging markets are decelerating from 5% to 4.6% to 4.3%. This convergence is somewhat unusual, as trends have historically moved in a similar direction year to year.

Chart 1



One driver for the positive trend among advanced economies is the long-awaited recovery of markets like Italy and Spain, after a double dip recession. Europe’s GDP growth increased from 0.1% in 2013 to 1.4% in 2014 and is expected to reach 1.8% in 2015. Because the stronger growth for advanced economies to some extent reflects recovery rather than a systemic long term trajectory, the IMF expects the growth to flatten in 2016 and then slow gently thereafter.

The current dip in emerging market growth is also expected to be short-lived. Brazil and China are both major contributors to the trend, though they have completely different scenarios. Brazil’s slowdown is significant enough to put the country in recession in 2015 (-1%) as a problematic combination of high inflation and high interest rates foils potential government stimulus tactics. In contrast, China’s slowdown is far from recessionary at an expected 6.8% in 2015. The effects of unrealistically optimistic speculation (e.g. real estate supply surplus, manufacturing overcapacity) are key drivers of the trend, while stock market volatility has undoubtedly shaken investor confidence. China is expected to suffer through a challenging corrective period as supply and demand are brought into balance. Even through these challenges, however, China is expected to maintain GDP growth of 6% or above over the next seven years.

### CURRENCY HEADWINDS

One of the key challenges facing all U.S. exports in 2015 is the remarkable strength of the dollar against other currencies. In the fourth quarter of 2014, the dollar’s value began to rise, reaching a peak against many currencies in March (see Chart 2). Among the top visitor origin markets, Brazil is the most severely impacted. For much of 2015, a U.S. vacation has been essentially 40-50% more expensive to Brazilians compared to 2013. The Canadian dollar, the Mexican peso and the Euro have been approximately 20% weaker against the dollar. Due to advanced bookings, the impact of currency exchange in the first half of 2015 will be limited. Many of the travelers arriving in March, for example, would have booked months before the dollar jumped in value. Exchange rates will therefore have a stronger impact on U.S. arrivals in the latter half of the year.

Chart 2

**Value of U.S. Dollars (Indexed Against 2013 Average)**



### Value of U.S. Dollars (Indexed against 2013 average)

The United States receives the largest volume of global tourism spending according to the United Nations World Tourism Organization (UNWTO). In 2014, overseas visitors to the USA spent \$177 billion, up 2.5% from 2013. At less than half the volume, Spain is the next largest destination at \$65 billion in 2014. China's tourism receipts jumped 10% to \$57 billion in 2014, bringing it from fifth place in 2013 to replace France as the number three destination.

China overtook the United States as the world's largest origin market of tourism spending in 2012, and its lead continues to grow. Chinese travelers spent \$165 billion in 2014, up 27% from the prior year. Over the next decade, Asian markets will lead growth both as a source and a destination for international travelers. The UNWTO projects that Asia Pacific's share of global arrivals will increase from 22% in 2010 to 30% in 2030. In turn, mature destinations will recede share, as their growth rate (2.2%) will be half that of emerging markets (4.4%). In order to reach the National Travel and Tourism strategic goal of reaching 100 million visitors by 2021, the United States must outperform its competitive set of mature tourism markets.

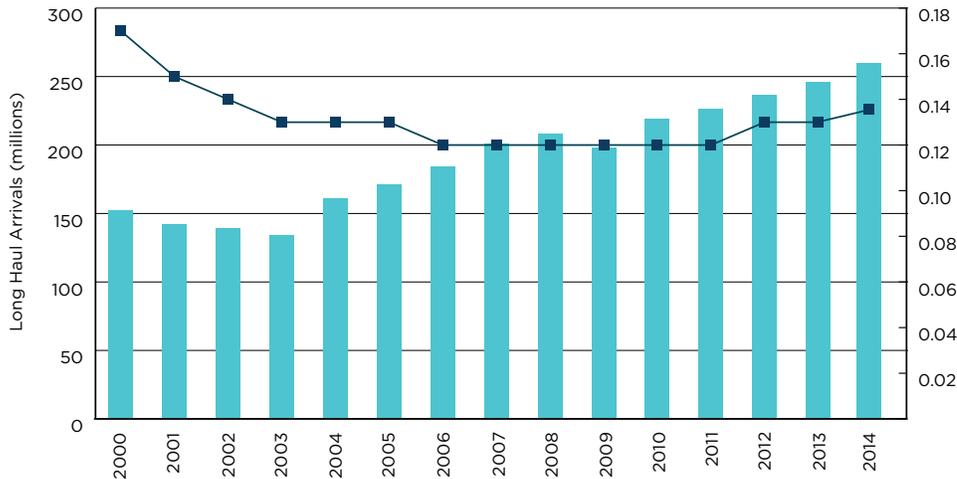
## THE UNITED STATES CONTINUES TO REGAIN LOST MARKET SHARE

According to Oxford Economics, Brand USA's marketing efforts have generated over 2 million incremental visitors to the United States over the past two years (2013-2014). While the standalone results clearly demonstrate the success of Brand USA initiatives, global market share analysis adds additional perspective on our impact. The collective efforts of Brand USA and the travel and tourism industry have propelled the United States ahead of the global average since 2010. (see Chart 3)



Chart 3

### GLOBAL LONG HAUL ARRIVALS AND U.S. MARKET SHARE



Source: Oxford Economics, NTTO

Note: Data was last updated 7/15/15 and is continually revised as better global information is made available.

Nevertheless, the United States still has a long way to go to regain the market share that was conceded during “The Lost Decade,” a period after 9/11 during which the USA lost 30% of its global long haul market share. Absent the industry’s specialized, coordinated efforts to attract additional international visitors, the United States would have continued ceding more share to other tourism markets around the world. For each measure of progress, we are not only counteracting, but outpacing a current that flows against us.

## THE U.S. PERSPECTIVE

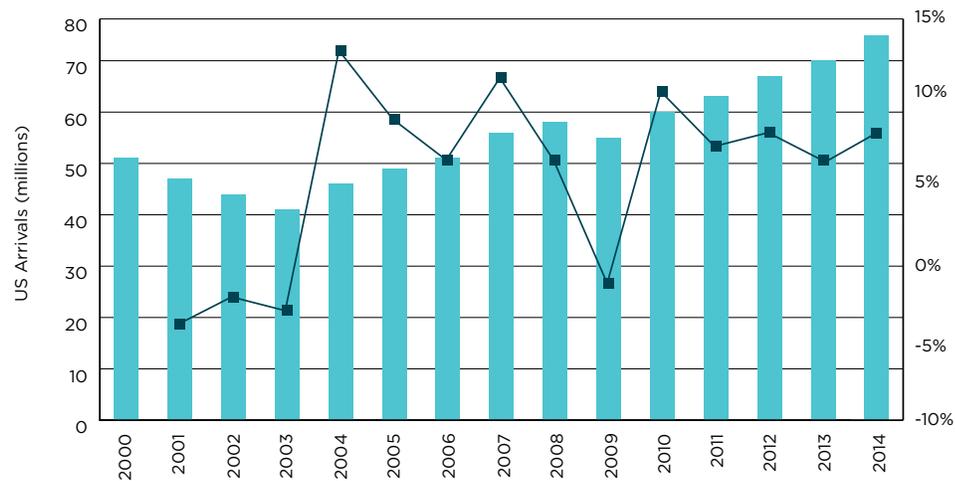
### U.S. ARRIVALS: OUTPERFORMING EXPECTATIONS

The United States welcomed a record 74.7 million international visitors in 2014, reflecting a 6.8% increase from 2013 (see Chart 4). While growth was slightly overstated due to a change in methodology used by the Department of Commerce’s National Travel and Tourism Office (NTTO), U.S. arrivals outperformed previous expectations as growth was expected to decline rather than accelerate in 2015. Accurate year-over-year trending may be somewhat challenged in the short-term as the Department of Commerce and Department of Homeland Security consider any methodology enhancements to improve the accuracy and timeliness of arrivals reporting.

In the years ahead, NTTO forecasts that arrivals will maintain an average growth rate of 4.3%. Arrivals growth is expected to fall below that average in 2015, however, due to the comparative strength of the U.S. dollar. Swift recovery of 2015's lost momentum is essential in order to reach our long-term target of reaching 100 million visitors by 2021. Brand USA has continued its marketing efforts in 2015 with this in mind, recognizing that the return may not actualize until after the short-term currency disadvantages are resolved. This strategy may impact the ROI of Brand USA's 2015 activities, but lays the foundation for bolstering growth in 2016 and beyond.

Chart 4

### U.S. INTERNATIONAL ARRIVALS & GROWTH



Source: NTTO

## TOP 10 MARKETS

Brand USA is focused on markets that supply international travelers to the United States. Throughout FY2016, a strong combination of consumer marketing and trade outreach will be active in each of the top 10 markets that have the potential to generate the majority of international inbound travel and spend to the United States.

## 2014 INTERNATIONAL VISITATION TO THE USA

Rank	Country	2014 Arrivals
<b>1</b>	 <b>Canada (-2%)</b>	<b>23.00 Million</b> After four consecutive years of record-setting visitation by our neighbors to the north, Canadian arrivals in the United States decreased slightly in 2014—strongly influenced by a large decline in the one-night only auto travel segment, coupled with a sharp depreciation of the Canadian currency relative to the U.S. dollar. Canada accounted for 30.8% of total international arrivals in the United States in 2014.
<b>2</b>	 <b>Mexico (+19%)</b>	<b>17.33 Million</b> How important is the market south of the border to U.S. travel and tourism? In 2014 the United States welcomed more visitors from Mexico than we did from the United Kingdom, Japan, Brazil, China, Germany, France, South Korea—combined! Mexico accounted for 23.2% of total international arrivals in the United States in 2014.
<b>3</b>	 <b>United Kingdom (+4%)</b>	<b>3.97 Million</b> After four consecutive years of declines in U.K. visitation between 2009 and 2012, visitation is once again on the uptick, increasing 2% and 4% in 2013 and 2014, respectively. We are still, however, 730,000 visitors short of the record set in 2000 when we welcomed more than 4.7 million visitors from across the pond. United Kingdom accounted for 5.3% of total international arrivals in the United States in 2014.
<b>4</b>	 <b>Japan (-4%)</b>	<b>3.58 Million</b> Visitation from Japan has been eroding for more than a decade, declining in 6 of the last 10 years. In 1997 the United States welcomed a record 5.4 million visitors from Japan; in 2014, however, the United States welcomed 3.6 million Japanese visitors—nearly 1.8 million fewer than we had welcomed in the late '90s. Japan accounted for 4.8% of total international arrivals in the United States in 2014.
<b>5</b>	 <b>Brazil (+10%)</b>	<b>2.26 Million</b> The United States welcomed a record 2.3 million visitors from Brazil in 2014, an increase of nearly 204,000 visitors (10%) and the 5th consecutive year of record-setting visitation. In fact, U.S. arrivals from Brazil have more than doubled since 2009, tripled since 2007, and have increased nearly five-fold over the last ten years. Brazil accounted for 3.0% of total international arrivals in the United States in 2014.
<b>6</b>	 <b>China (+21%)</b>	<b>2.19 Million</b> Five years ago, China wasn't even a top 10 origin market. Now, however, China has once again supplanted another market (Germany) to command 6th place; and if 2015 is anything like 2014, China will once again bump another country down in the rankings and lay claim to 5th place, which is currently occupied by Brazil. China accounted for 2.9% of total international arrivals in the United States in 2014.
<b>7</b>	 <b>Germany (+3%)</b>	<b>1.97 Million</b> Despite a half decade of positive growth, Germany has—for the third consecutive year—fallen in the rankings after failing to keep pace with developing markets like Brazil and China. In fact, the United States welcomed 28,300 fewer visitors from Germany in 2014 than we welcomed in 1996. Germany accounted for 2.6% of total international arrivals in the United States in 2014.
<b>8</b>	 <b>France (+8%)</b>	<b>1.62 Million</b> More than 1.6 million travelers from France visited the United States in 2014, an increase of nearly 8% when compared to the previous year and the 2nd consecutive year of record arrivals from France; and while France didn't make the top 10 in terms of spending, they did, however, spend a record-setting \$5.7 billion in 2014. France accounted for 2.2% of total international arrivals in the United States in 2014.
<b>9</b>	 <b>South Korea (+7%)</b>	<b>1.45 Million</b> For the 5th consecutive year, the United States enjoyed record-setting arrivals from the peninsula, welcoming more than 1.4 million visitors in 2014. If the current rate of growth continues, we will welcome twice as many visitors from Korea in 2015 as we welcomed in 2008—the year in which they joined the Visa Waiver Program. South Korea accounted for 1.9% of total international arrivals in the United States in 2014.
<b>10</b>	 <b>Australia (+6%)</b>	<b>1.28 Million</b> Over the last decade, U.S. arrivals from Australia have more than doubled, delivering record-setting visitation to the United States for ten consecutive years. While India, currently ranked 11th in terms of visitation, grew at twice the rate (12%) in 2014, Australia should remain a top 10 market for at least a few more years. Australia accounted for 1.7% of total international arrivals in the United States in 2014.

Source: NTTO

## TOP 10 MARKETS

An important part of the equation when considering the markets where we promote travel to the United States is spend. In addition to total spend, we also consider how various markets rank in terms of spend per traveler.

### 2014 INTERNATIONAL SPENDING IN THE USA

Rank	Country	2014 Spending
<b>1</b>	 <b>Canada (-2%)</b> When the undisputed heavyweight of travel and tourism-related spending in the United States goes down, all of us should give pause. This proportionate 2 percent decline in spending is purely a function of visitation, as average per visitor spending was relatively unchanged, while U.S. visitation declined by 2 percent in 2014. Travel and tourism exports account for 43% of all U.S. services exports to Canada.	<b>\$27.2 Billion</b>
<b>2</b>	 <b>China (+13%)</b> A decade ago, China ranked ninth in terms of total tourism-related spending in the United States. Now, however, after more than a decade of double-digit growth, China has vaulted into second place after spending a record-setting \$23.8 billion in the United States in 2014—injecting roughly \$65 million a day into the U.S. economy. Travel and tourism exports account for 57% of all U.S. services exports to China.	<b>\$23.8 Billion</b>
<b>3</b>	 <b>Mexico (+7%)</b> Visitors from Mexico spent a record-setting \$19.3 billion in the United States in 2014, an increase of 7 percent over the previous year. Visitation from Mexico, however, increased 19 percent in 2014; so while we welcomed more visitors from Mexico, those who did visit the United States spent, on average, less than the year before. Travel and tourism exports account for 65% of all U.S. services exports to Mexico.	<b>\$19.3 Billion</b>
<b>4</b>	 <b>Japan (-2%)</b> U.S. travel and tourism-related exports to Japan have been fraught with difficulties—SARS in 2003, the economic slowdown of 2009, and nuclear emergencies in 2011. Now this. Japanese visitor spending declined 2 percent to \$17.3 billion in 2014, marking the seventh decline in visitor spending in the last fourteen years. Travel and tourism exports account for 37% of all U.S. services exports to Japan.	<b>\$17.3 Billion</b>
<b>5</b>	 <b>United Kingdom (+0%)</b> The good news is that visitors from the United Kingdom spent \$39 million more in the United States in 2014 than they spent in 2013. Indeed, U.K. visitors spent \$13.2 billion in the United States last year, virtually unchanged from the previous year. The bad news is that this is nearly \$3 billion less than they spent in 2008. Travel and tourism exports account for 21% of all U.S. services exports to the United Kingdom.	<b>\$13.2 Billion</b>
<b>6</b>	 <b>Brazil (+5%)</b> After a decade of spending growth averaging nearly 22% a year, Brazil has securely positioned itself as the 6th largest market for U.S. travel and tourism exports and will undoubtedly rival the United Kingdom for 5th next year. In 2014 visitors from Brazil spent \$13.0 billion in the United States, up nearly 5 percent year over year. Travel and tourism exports account for 47% of all U.S. services exports to Brazil.	<b>\$13.0 Billion</b>
<b>7</b>	 <b>India (+7%)</b> For the fifth consecutive year, visitors from India spent more experiencing the United States than ever before, spending a record-setting \$9.6 billion on U.S. travel and tourism-related goods and services in 2014. Over the last decade, travel and tourism exports to India have more than doubled, now accounting for 65% of all U.S. services exports to India.	<b>\$9.6 Billion</b>
<b>8</b>	 <b>South Korea (+10%)</b> After another record-setting year of tourism-related spending, South Korea displaced Germany in the rankings and climbed to 8th in terms of total spending in the United States. In 2014 visitors from South Korea spent \$7.8 billion in the United States, an increase of 10 percent when compared to 2013. Travel and tourism exports account for 38% of all U.S. services exports to South Korea.	<b>\$7.8 Billion</b>
<b>9</b>	 <b>Germany (+2%)</b> Once ranked as high as 5th in 2008, Germany has slowly descended in the rankings and further fell to 9th in 2014 despite a much-welcomed increase of 2 percent in 2014. Put simply, spending by visitors from Germany has failed to keep pace with the more developing countries' spending (e.g., Brazil, India, and South Korea). Travel and tourism exports account for 26% of all U.S. services exports to Germany.	<b>\$7.4 Billion</b>
<b>10</b>	 <b>Australia (-10%)</b> In 2014 U.S. arrivals from Australia increased nearly 6 percent when compared to 2013; spending, however, dropped precipitously to \$6.1 billion for the year, a decrease of nearly 10 percent. While it's too early to fully explain this decline, since 2013 the U.S. dollar has appreciated, well, appreciably relative to the Australian dollar. Travel and tourism exports account for 32% of all U.S. services exports to Australia.	<b>\$6.1 Billion</b>

Source: NTTO

## THE PATH TO 100 MILLION INTERNATIONAL ARRIVALS

After five years of coordinated effort between Brand USA, the Federal government and the travel industry, the United States is well positioned to reach the National Travel and Tourism Strategy's goal of welcoming 100 million international visitors to the USA by 2021. To achieve this goal, arrivals growth must maintain an average of 4.24% each year from 2015 to 2021. Current forecasts show the United States reaching the target by a narrow margin. It will be challenging to maintain consistently strong growth over the next seven years.

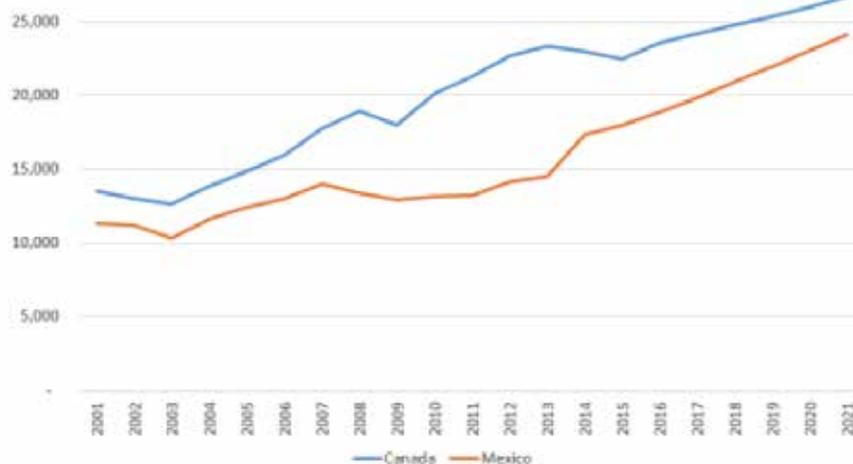
Brand USA has developed a Path to 100 Million International Arrivals as a method to represent specific annual targets for top origin markets. It is based mainly on origin market trends – the departures leaving a particular market and U.S. market share of those departures. Utilizing this information allows us to identify opportunities in markets where we have low market share. Unlike the forecast released by NTTO, this information is not intended as a prediction of actual arrivals.

### NORTH AMERICA OUTLOOK

Canada and Mexico contribute over half of all U.S. international visitation. Despite the maturity of these source markets, their arrivals patterns have deviated significantly over the past decade (see Chart 5). Most notably, in 2014, arrivals from Canada declined by 2% while visitation from Mexico jumped 19%. Though at a far more moderate pace, future arrivals from Mexico are expected to continue growing substantially faster than arrivals from Canada. Mexico's stronger gains will be driven by overall economic progress and expansion of the middle class.

Chart 5

#### U.S. ARRIVALS - NORTH AMERICAN MARKETS





China's economy has been the subject of much conjecture due to a number of negative indicators, including real estate and stock market volatility. Regardless of China's ability to hit its GDP target of 7%, the country still maintains more than double the GDP growth of most established markets. Therefore, despite longer term deceleration of growth, Chinese arrivals are expected to maintain a strong, double digit trajectory for years to come. By 2021, China may overtake the United Kingdom as the largest overseas market.





# Summary Marketing Plan

# FY2016 OBJECTIVES, STRATEGIES, AND GOALS

Note: FY2015 numbers are projected as of 7/19/15

## #1 DRIVE RESULTS

*Increase international visitation, spend, and global market share for the USA.*

### Goals:

- 1.04 million incremental international visitors (vs. 903,440 in 2014 and 1 million in 2015)
- \$3.8 billion in incremental international spend (vs. \$3.1 billion in 2014 and \$3.4 billion in 2015)
- \$7.6 billion in total economic impact (vs. \$7.06 billion in 2014 and \$7.3 billion in 2015)
- 51,400 incremental jobs supported (vs. 50,000 average in 2013 and 2014)
- Manage overhead to remain below 15%

### Strategies:

- Maximize return on investment by deploying the right messages, in the right markets, through the right channels, at the right times, and at the right levels of investment.
- Establish processes and systems to maximize, track, and report use of our overhead to ensure the majority of our annual budget goes to effective marketing initiatives.
- Shift marketing expenditure to markets that drive higher ROI (emerging markets) by securing contributions that are optimized for growth/higher ROI markets and maintaining presence in co-op programs.
- Execute consumer advertising in selected markets that effectively target travelers and positively impact their intent to visit the USA (according to market prioritization and segmentation strategies).
- Track and document results of all programs segmented by country and ensure that all programs meet our messaging objectives.
- Execute third annual ROI study summarizing the impact of all Brand USA marketing activities.
- Conduct in-market post-campaign studies and monthly brand tracking reports.



## #2 CREATE INNOVATIVE MARKETING

*Promote the entirety of the USA with innovative marketing that supports all 50 states, the District of Columbia and five territories to, through, and beyond the gateways.*

### Goals:

- Launch the USA marketing campaign in 14 key markets as outlined in the Marketing Plan Summary.
- Improve appeal of creative and brand recognition by 5%.
- Increase website visitation and social engagements by 5%.
- Execute metrics evaluation plan according to planned delivery schedule.

### Strategies:

- Develop and launch compelling new creative, messaging, content, and marketing plan that inspire travelers to visit the USA.
- Optimize the mix of consumer marketing, trade outreach, and co-op programs and platforms to increase awareness, intent to travel and demand.
- Engage and inspire travelers through storytelling that emphasizes experience and provides a call to action.
- Build and distribute dynamic content with a focus on the Great Outdoors, Urban Escapes, Culinary, and other inspiring experiences.
- Maximize the launch of the giant-screen film to celebrate the Centennial of the National Park Service and promote travel to the USA and the National Parks..
- Leverage traveler segmentation and market prioritization to maximize effectiveness and efficiency of all efforts, including identifying the most valuable traveler segments as well as key markets for investment. Develop programs to engage partners along this roadmap.
- Establish a development roadmap and partner programs plan that supports the deployment of marketing spend in the markets that drive the strongest increases in, or defense of, visitation, spend, and/or market share.
- Design and launch a new consumer website that informs, engages, and inspires travelers to proceeding through the travel planning journey.
- Develop and deliver 2016 metrics plan to provide leading and lagging indicators of market conditions, trends and ROI to support the Path to 100 Million International Arrivals.



### #3 MARKET THE WELCOME

*Inspire, inform, welcome, and thank travelers while accurately communicating vital and compelling information about visa and entry policies.*

#### **Goals:**

- Achieve 100% of annual objectives shared with the Tourism Policy Council
- Deploy Federal resource program in three embassies by fiscal year-end
- Deploy international arrival program in five international arrival halls with 100% compliance to brand and national voice

#### **Strategies:**

- Collaborate with the Federal government to communicate vital and compelling information regarding visa and entry policies through all Brand USA channels.
- Develop FY2016 shared objectives and work plan with the Tourism Policy Council to execute collaboratively during the fiscal year.
- Collaborate with the U.S. missions abroad to develop new collateral and enhance existing communications materials that can be distributed and displayed at embassies, consulates, key information centers, digital properties, meetings, and high-profile events.
- Redevelop and expand a rich digital site and communications plan in cooperation with our Federal partners and travel suppliers to provide information to improve the travel experience.
- Support the expansion of the Market the Welcome program developed for airports to U.S. embassies and other relevant welcome organizations to carry the brand and national voice. This effort will include, but will not be limited to, the creation of video, signage, and other collateral for international arrival halls.
- Collaborate with the Department of Homeland Security to promote trusted traveler programs, such as Global Entry.
- Working with the Tourism Policy Council, determine the key metrics to track the success of entry policy communication and other joint promotional efforts.

## #4 BUILD AND MAINTAIN TRUST

*Build and maintain trusted relationships with stakeholders worldwide through inclusive, proactive, and transparent outreach with a commitment to compliance and integrity through words, actions, and results.*

### Goals:

- Achieve 100% compliance with policies, procedures, and the Travel Promotion Act
- Benchmark year: Earn an 85% overall annual satisfaction rating with domestic partners (with benchmark year survey questions to measure against the marketing and communications strategies for this objective)
- Manage ESTA submission cycle time to 85 days or fewer for cash contributions and 120 days or fewer for in-kind contributions

### Strategies:

- Ensure ongoing compliance management and monitoring with appropriate policies, procedures, and controls.
- Deliver well-documented and compliant ESTA submissions.
- Produce and deliver the organization's FY2015 annual report to the Department of Commerce for transmittal to Congress by May 15.
- Produce and deliver the organization's annual objectives, budget, and marketing plan to the Department of Commerce by August 1 for FY2017.
- Develop a communications and cultivation strategy to support all departments and ensure we consistently employ inclusive, proactive and transparent outreach with stakeholders worldwide.
- Ensure full engagement with partners to maximize partner satisfaction and retention that establishes Brand USA as their go-to partner to support their international marketing effort.
- Execute partner feedback study and report results.
- Continue to deploy and expand strategic communications, industry relations, and media relations plans that ensure consistent, accurate, and frequent updates on progress through a series of webinars, newsletters, meetings, and other communications.
- Cultivate industry relationships and seek partner input and feedback through a series of partner roundtables and other cultivation events.
- Maintain active participation in key industry conferences.

## #5 ADD AND CREATE VALUE

*Pioneer cooperative marketing platforms and programs that leverage and grow the USA brand in ways our partners would be challenged or unable to do on their own.*

### Goals:

- Generate \$100 million in contributions from private industry and other non-Federal sources
- Target 50% from cash contributions and 50% from in-kind contributions, but no less than 30% cash and no more than 70% in-kind
- Maintain a 90% or higher partner program retention rate in FY15 over FY14
- Increase partnership base to 525

### Strategies:

- Build upon the effectiveness of our overall destination marketing strategies by leveraging the strength of Federal resources, including embassies and consulates, worldwide.
- Participate in the development of in-country strategies with Department of Commerce Commercial Service offices and Visit USA committees.
- Collaborate with the State Department and the Foreign Commercial Service on in-market communications, social media, and embassy events.
- Engage with partners to create scalable programs across multiple budget levels by sharing insights, best practices from past programs, and co-creating 2017 initiatives with ample lead times.
- Create industry-leading, compelling and scalable turnkey programs that showcase the full variety of U.S. destinations.
- Continue to establish programs that allow partners to contribute and engage across all markets to leverage and promote their assets to international audiences.
- Focus development efforts on securing in-kind media to enhance Brand USA consumer campaigns or co-op campaigns, extending the reach of USA marketing efforts.
- Establish a strategy with major partners to amplify a national voice in markets and expand reach while developing other market entry programs.
- Share proprietary Brand USA insights with partners to provide guidance for cooperative marketing strategies.

## ONGOING PROMOTIONAL ACTIVITIES

Brand USA will utilize a number of market-driven platforms and programs to increase inbound visitor travel to the United States and drive tourism dollars to communities in all 50 states, the District of Columbia and the five territories. Our programs will include the USA marketing campaign, trade outreach initiatives, co-op marketing opportunities, and media/public relations outreach that, in total, promote the United States in its entirety, and add and create value for partners.



### THE USA MARKETING CAMPAIGN (DIRECT-TO-CONSUMER)

The USA Marketing Campaign, which includes any combination of broadcast, out-of-home, and digital/social, plus earned media and public relations, has been fundamental to Brand USA's aim to create awareness and inspire travel to the United States. During FY2016 we will refresh and expand the creative approach and calls-to-action inherent in this campaign to further enhance the ROI of these efforts. While the media mix will vary by market, Brand USA will consider and utilize the following channels:

#### Broadcast and Online Video

The creative featured in our campaign advertisements was informed by consumer research and will continue to be enhanced by learnings from consumer testing in target markets. In addition to the tangible results these campaigns deliver, they provide opportunities for our partners to reach international travelers through co-op marketing opportunities.

#### Out-of-Home

Out-of-home advertising, which includes signage (print and digital), video, and other public/on location advertising, will be utilized in appropriate markets in order to reach international travelers when they are in active public places. These include, but are not limited to public transportation and transit (subway, taxi, bus, etc.), and commercial locations (city centers, retail venues, cinema, etc).

## Digital/Social Platforms and Channels

Digital and social media strategies will continue to be an important method to inspire, engage, and activate international travelers to visit the United States during the plan year through:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns

### Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

- Discover America ([www.DiscoverAmerica.com](http://www.DiscoverAmerica.com)), which is active in most markets where Brand USA markets the United States to international travelers, and
- Go USA, which is active in Chinese-speaking markets, including China and Hong Kong ([GoUSA.cn](http://GoUSA.cn)) and Taiwan ([GoUSA.tw](http://GoUSA.tw)).

Together, the Discover America and Go USA website platforms are the consumer-facing online identities that international travelers associate with travel to the United States.

### Social Media Channels

In addition to the global and market-specific Discover America and Go USA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully-developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.



### Current Global Footprint for Social Media Activity

In addition to its global channels, Brand USA, through its Discover America brand, currently has localized social media efforts globally and in 14 markets. All in-language content is tagged with the country-appropriate handles and websites via the channels shown below:

Country	In-Language Website	Facebook Page URL*	Twitter Handle*
<b>Global</b>	DiscoverAmerica.com	Facebook.com/DiscoverAmerica	<b>Twitter:</b> @DiscoverAmerica <b>YouTube:</b> youtube.com/ DiscoverAmerica <b>Instagram:</b> DiscoverAmerica <b>Google+:</b> google.com/+discoveramerica
<b>Australia</b>	au.discoveramerica.com	Facebook.com/DiscoverAmericaAUS	@DiscoverusaAUS
<b>Brazil</b>	discoveramerica.com.br	Facebook.com/DescubraEUA	@DescubraEUA
<b>Canada</b>	<b>English:</b> discoveramerica.ca <b>French:</b> discoveramerica.ca/fr	Facebook.com/DiscoverAmericaCA	@DiscoverUSAcA @DiscoverUSAqc
<b>Chile</b>	discoveramerica.cl	Facebook.com/DescubreUSAcI	@DescubreusaCL
<b>China</b>	GoUSA.cn GoUSA.tw	<b>Sina Weibo</b> (Chinese microblogging site/hybrid of Twitter and Facebook): <a href="http://e.weibo.com/u/3606551013">http://e.weibo.com/u/3606551013</a> <b>Tencent Weibo</b> (Chinese microblogging site): <a href="http://t.qq.com/DiscoverGoUSA">http://t.qq.com/DiscoverGoUSA</a> <b>Youku</b> (YouTube equivalent): <a href="http://u.youku.com/美国国家旅游局GoUSA">http://u.youku.com/美国国家旅游局GoUSA</a> <b>Weishi</b> (similar to Vine): <a href="http://www.weishi.com/u/23484775">http://www.weishi.com/u/23484775</a> <b>Facebook</b> (Hong Kong & Taiwan): Facebook.com/gousa.official	
<b>France</b>	discoveramerica.fr	Facebook.com/discoveramericafr	@DiscoverUSAfr
<b>Germany</b>	de.discoveramerica.com	Facebook.com/EntdeckeAmerika	n/a (not locally relevant)
<b>Hong Kong</b>	GoUSA.cn	<b>Facebook</b> (Hong Kong & Taiwan): Facebook.com/gousa.official <b>Tencent Weibo</b> (Chinese microblogging site): <a href="http://t.qq.com/DiscoverGoUSA">http://t.qq.com/DiscoverGoUSA</a> <b>Youku</b> (YouTube equivalent in market): <a href="http://u.youku.com/GoUSA">http://u.youku.com/GoUSA</a>	
<b>India</b>	discoveramerica.co.in	Facebook.com/DiscoverAmericaIndia	@DiscoverusaIN
<b>Japan</b>	discoveramerica.jp	Facebook.com/DiscoverAmericaJP	@DiscoverUSAjp
<b>South Korea</b>	discoveramerica.co.kr	Facebook.com/DiscoverAmericaKR	@DiscoverUSAkr
<b>Mexico</b>	discoveramerica.mx	Facebook.com/DescubreeuaMX	@DescubreeuaMX
<b>Taiwan</b>	GoUSA.tw	<b>Sina Weibo</b> (Chinese microblogging site/ hybrid of Twitter and Facebook): <a href="http://e.weibo.com/u/3606551013">http://e.weibo.com/u/3606551013</a> <b>Facebook</b> (Hong Kong & Taiwan): Facebook.com/gousa.official	
<b>United Kingdom</b>	discoveramerica.com	Facebook.com/DiscoverAmericaUK	@DiscoverUSAuk

\* or similar channels in market

### Global Digital Marketing Social Campaigns

Throughout the year, the Brand USA digital team partners with local experts in each market to apply their global marketing insights to create culturally-relevant social media content and campaigns.

Brand USA Current Campaign Hashtags	
<b>General Content</b>	#DiscoverAmerica
<b>Giant-Screen Film</b>	#VisitTheUSA
<b>Road Trips</b>	#RoadTripUSA
<b>Great Outdoors</b>	#OutdoorsUSA
<b>Culinary</b>	#TasteUSA

The custom social campaigns provide localized digital and social presence in nine international markets, with one global presence in English.

In addition to engaging international travelers through ongoing conversations via social media channels, Brand USA also develops a variety of custom programming, including a series of road trips that showcase the United States and inspire travelers to take their own journeys.

As Brand USA's social media influencers drive across the United States, they share their experiences blogging and posting photos and videos of their travels, with Brand USA further supports their communication efforts with comprehensive digital content and promotion plans, as well as functionality on Brand USA's Discover America platforms that move travelers from inspiration to action by providing them the tools to plan and create their own road trips, access curated playlists inspired by iconic routes, and share their experiences.



## CO-OP MARKETING PLATFORMS AND PROGRAMS (DIRECT-TO-CONSUMER)

Co-op marketing platforms and programs make up the majority of our marketing efforts and deliver an array of marketing options to increase awareness, visitation and spend. They also provide opportunities for partners of all shapes and sizes to participate and are an important way we promote travel experiences in the United States to, through and beyond the gateways.

### Brand USA Originals

Brand USA Originals are marketing programs developed and offered exclusively by Brand USA. They include proprietary programs developed by Brand USA and those created in partnership with influential travel media and major travel and lifestyle brands.

### Brand USA Affinity Programs

Affinity programs are programs that Brand USA has developed with media, online travel agencies (OTAs) or other travel-related publishers to advertise and promote U.S. destinations, experiences, attractions and other travel opportunities. They are a particularly valuable way to highlight partner offers and inspire USA travel experiences.

### Market-Specific Programs

Through market specific programs, Brand USA connects partners with its in-country experts to ensure co-op marketing efforts are deployed in the right markets. Programs are designed for either partner launch or expansion in established or emerging markets. These programs are ideal for cities and states that are focusing on specific markets or entering a market for the first time.

## TRADE OUTREACH

Brand USA currently works with its expanding network of international representatives, Visit USA committees, travel and tourism advisory boards, U.S. embassy personnel and U.S. Commercial Service teams to support participation in numerous trade activities, including:

- Trade Shows
- Sales Missions, Road Shows, and Themed Events
- Training Initiatives
- MegaFams and Other Familiarization Tour Opportunities
- Advisory Boards

## Trade Shows

Throughout the year, Brand USA hosts a series of USA-branded pavilions at influential travel and trade shows—providing participating U.S. exhibitors the opportunity to reach 1.6 million international travel buyers and inspire future travel to the United States.

Brand USA serves as the unifying element at these shows, representing U.S. travel and tourism interests on a global scale, with destinations, travel brands and other organizations participating as exhibitors. Participating organizations retain their own identity yet benefit from being part of a more visible, collaborative United States effort. To further amplify the USA's and participating partners' presence, Brand USA also organizes related events before, during and after many of these shows.

Unified Brand USA pavilions provide exhibitors:

- Market analytics and insights
- Marketing, advertising, public relations activities and media exposure
- Increased global exposure
- Customer engagement and entertainment opportunities

## Sales Missions, Road Shows, and Themed Events

Another essential component of Brand USA's trade outreach includes sales missions. These Brand USA-hosted events invite travel industry professionals in key markets to meet with U.S. organizations at designated international locations. Through a series of planned events, Brand USA and sponsor partners connect directly with international travel buyers, including tour operators, airlines, travel agents, incentive and meeting planners and media. These connections allow us to provide a more in-depth look at U.S. destinations and experiences in order to increase travel bookings to the United States.

Our outreach also includes taking participants directly to the travel trade in international markets via Road Show events. Brand USA and partner organizations are able to connect directly with tour operators, travel agents and travel buyers through a series of seminars, receptions and events where participating partners acquire the knowledge and information needed to better promote the United States as a travel destination.

Based on market need and opportunity, Brand USA also organizes custom themed events in key international markets that position and promote the United States as the go-to travel destination.

These events are generally celebratory programs, themed around specific holidays and experiences to help promote destinations, travel brands and other organizations.

## Training Initiatives

Two distinct Brand USA travel trade training initiatives provide the tools and information our international travel buyers need in order to sell, up-sell and cross-sell U.S. travel destinations and experiences.

### **USA Discovery Online Training Platform**

This experience-based, hands-on training platform features a variety of destination modules to inspire and motivate the travel industry to sell “this land like never before.” Modules focus on certain states or areas, and travel agents and tour operators can earn specialist badges as they complete each section.

### **Training Seminars**

Brand USA also presents in-market training seminars that focus on a specific experience or region in the United States—providing a targeted approach to promoting U.S. travel destinations.

### **MegaFams and Other Familiarization Tours**

Familiarization tours, or “fams,” with the travel trade are an integral part of the organization’s marketing strategies to create awareness of the diverse destinations and travel experiences available throughout the United States. The Brand USA fam tours are called “MegaFams” because they are the largest multi-itinerary simultaneous familiarization tours conducted in the United States.

Brand USA organizes and coordinates these diverse U.S. travel experiences in order to more fully promote multiple destinations. They are especially effective in motivating the travel trade to sell beyond-the-gateway experiences to their clients, because the itineraries include a broad range of travel experiences, attractions and brands from the popular gateway cities to off-the-beaten-path encounters.

Through Brand USA MegaFam experiences, travel agents and tour operators become better informed, empowered and inspired to sell a multitude of U.S. destinations to, through and beyond the gateways.

## **MEDIA AND PUBLIC RELATIONS OUTREACH (CONSUMER AND TRADE)**

Brand USA works with media outlets to promote the entirety of the United States and offers a number of programs that provide partners opportunities to increase awareness and inspire travel to their destinations through the power and credibility of earned media coverage.

Leveraging its access to and relationships with journalists, plus its online newsroom platform and ongoing scheduling of journalist familiarization tours, Brand USA promotes destinations and travel experiences in every state, the District of Columbia and the five territories with extensive media coverage in both travel trade and consumer media, including broadcast, print and online.

## MARKET SELECTION MODEL

During FY2016, Brand USA will deploy its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

The FY2016 target markets were determined by using a unique modeling tool that focuses on opportunity (feeder market size) and market opportunity rather than relying solely on past visitation to the USA.

The following 10 factors contribute at varying weights of importance to the list of high-opportunity target markets where Brand USA will focus its efforts:

Factor	Source
<b>International Travel Expenditures</b>	World Bank Indicators Database
<b>International Departures</b>	World Bank Indicators Database
<b>GDP (PPP)</b>	International Monetary Fund (IMF)
<b>GDP (PPP) Growth</b>	International Monetary Fund (IMF)
<b>Unemployment</b>	CIA World Factbook
<b>Civil Liberty</b>	Freedom House
<b>Population</b>	CIA World Factbook
<b>Ease of Doing Business</b>	World Bank Indicators Database
<b>GINI (Wealth Distribution)</b>	CIA World Factbook
<b>Special Circumstances</b>	Various Sources and Factors (examples: Inclusion/Added to Visa Waiver Program, Political Factors, Significant Economic Disruptions)



## FY2016 TARGET MARKETS

Based on the criteria set forth in our market selection model, Brand USA will be active in more than 30 markets that, in total generate 90% of all inbound travel to the United States.



Of these markets, the following are where Brand USA will fully deploy consumer and/or trade marketing activities during FY2016:

### Consumer

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- South Korea
- Sweden
- Mexico
- United Kingdom

### Trade

- Austria
- Benelux Region (Belgium, Luxembourg, Netherlands)
- Central America\*
- Hong Kong
- Hungary
- Italy
- Israel
- Nordic Countries\*
- South Africa
- South America
- Southeast Asia\*
- Spain
- Switzerland
- Taiwan
- Gulf Cooperation Council (GCC) Countries\*

\* select markets

## FY2016 USA MARKETING CAMPAIGN

The media mix for the consumer campaign (which we refer to as the “USA Marketing Campaign” because it is designed to promote the entirety of the USA) will include the optimum combination of any or all of the following for the respective market: broadcast, online video, cinema, out-of-home, digital display, online travel agency media, paid search paid social, events, and ongoing trade outreach.

### Consumer Target Market and the Travel Lifestyle

Universally, we will target a segment, if not all, of adults aged 25 to 59 who are affluent, educated travelers. In addition, within each market we will plan media and messaging approaches that speak to any uniquely identified local demographic and/or psychographic traits.

It’s also important to note that the target markets that will drive the most visitation in the coming years are at different levels of consumer demand and consumer development—requiring a more targeted strategic approach rather than a blanket approach.

Based on the varying phases of familiarity and affinity for travel to the USA, marketing activity will be focused around one particular stage of the travel life cycle. Efforts in established markets, such as Canada and the United Kingdom, will concentrate on facilitating and creating strong booking calls to action, while the approach in opportunity markets will seek to build awareness and inspire intent to travel.

### During FY2016, Brand USA will fully deploy its marketing efforts through the USA Marketing Campaign in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- South Korea
- Sweden
- Mexico
- United Kingdom

Our strategies in these markets are designed to :

- Align marketing partner efforts
- Identify and connect with international travelers and their travel motivations
- Allocate the proper resources and spend based on each market’s growth potential
- Utilize the right messaging, media types, channels, timing and measurements

The following pages provide the objectives and goals for each of the 14 markets where we will deploy the USA Marketing Campaign in FY2016. In total, these markets generate 81% of inbound travel to the United States. Every 1% increase in travelers from these markets to the United States results in:

- 570,000 more travelers
- \$12 billion more in travel-related spending by international travelers in the United States



## AUSTRALIA

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Increase visitation by younger travelers who are already considering an extensive international trip.

#### GOALS:

- Increase U.S. visitation to 1,374,389, an increase of 5% from 2015 (projected) and 8% from 2014 to 2015.

#### PRIMARY SEGMENT

Travelers (singles/couples) that are open to experiencing/celebrating different cultures, ways of life.

#### MOTIVATION

**Drivers:** Mix of unique outdoors adventures (RoadTrips) & urban experiences

**Barriers:** Distance and poor exchange rates.

#### TRAVEL TIMING

**Plan:** 3-12 months prior to travel

**Book:** 3-5 months prior to travel

**Key Travel Months:** April - October (with a spike June thru September)

#### MASTER TASK

Drive to partner (OTA, Tour)



## BRAZIL

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Inspire first-time visitors and attract experienced travelers to explore new U.S. destinations

#### GOALS:

- Increase U.S. visitation to 2,466,129, an increase of 7% from 2015 (projected) and 12% from 2014 to 2015.

#### PRIMARY SEGMENT

Affluent experienced first-time travelers, plus experienced travelers visiting the USA for the second or third time.

#### MOTIVATION

**Drivers:** Having fun, being active, shopping. When they go somewhere, they go everywhere. All the neighborhoods, not just the tourist attractions. Experience what is local or unique.

**Barriers:** Exchange rates.

#### TRAVEL TIMING

**Plan:** 3-5 months prior to travel

**Book:** 3-5 months prior to travel

**Key Travel Months:** June/July; December/January

#### MASTER TASK

Uncover new adventures and drive to partner websites to explore and book



## CANADA

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Reacquire experienced travelers while driving visitations. (“Win Every Inning”)

#### GOALS:

- Increase U.S. visitation to 23,554,024, an increase of 5% from 2015 (projected) and 3% from 2014 to 2015.

#### PRIMARY SEGMENT

Experienced travelers looking to fly to go on vacation (currently 25% drive across the boarder & then fly).

#### MOTIVATION

**Drivers:** Natural landscapes, beaches, convenience.

**Barriers:** Familiarity breeds indifference and desire to ‘mix things up’ - Other destinations share their interest. Poor exchange rates.

#### TRAVEL TIMING

**Plan:** 3-5 months prior to travel

**Book:** 3-5 months prior to travel

**Key Travel Months:** December - February; July - September

#### MASTER TASK

Drive to partner websites to book



## CHINA

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Maintain momentum and continued growth with first-time and experienced travelers.  
Extend the stay of the seasoned travelers.

#### GOALS:

- Increase U.S. visitation to 2,894,102, an increase of 16% from 2015 (projected) and a 34% increase from 2014 to 2015.

#### PRIMARY SEGMENT

1st time travelers - Young, urban, upwardly-mobile couples and new families.

#### MOTIVATION

**Drivers:** Social status; icons are key. Freedom; U.S. is intimidating, but fascinating. Visitors seek passive exploration, nature, shopping, cultural attractions. Pack in as much into group itineraries as possible.

**Barriers:** Not as sophisticated as Europe, culture clash.

#### TRAVEL TIMING

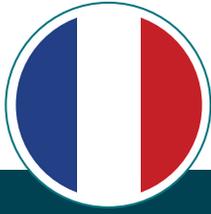
**Plan:** 1-2 months prior to travel

**Book:** 1-2 months prior to travel

**Key Travel Months:** July - October (heavy emphasis on October)

#### MASTER TASK

Dive deep into GoUSA and partner sites.



## FRANCE

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Increase frequency of visits by international travelers.

#### GOALS:

- Increase U.S. visitation to 1,805,070, an increase of 8% from 2015 (projected) and 11% from 2014 to 2015.

#### PRIMARY SEGMENT

Financially stable, young and single travelers living in big and medium cities.

#### MOTIVATION

**Drivers:** Local lifestyle, pop culture and historic attractions. The US is diverse, adventurous and forward- thinking. A place where people can pursue their passions. Cultural connections to France (New Orleans).

**Barriers:** Poor exchange rates. Traveling throughout Europe is much more convenient.

#### TRAVEL TIMING

**Plan:** 3-12 months prior to travel

**Book:** 1-5 months prior to travel

**Key Travel Months:** April - September

#### MASTER TASK

Refer to partner websites and DiscoverAmerica.com.



## GERMANY

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Increase visitation to new U.S. destinations by focusing on experienced travelers to the USA

#### GOALS:

- Increase U.S. visitation to 2,061,575, an increase of 4% from 2015 (projected) and 5% from 2014 to 2015.

#### PRIMARY SEGMENT

Mature couples who have been to the USA and are considering a return trip to pursue beyond-the-gateway experiences.

#### MOTIVATION

**Drivers:** Easy accessibility. Landmarks/sightseeing options. Urban life/quality of the beaches for relaxation.

**Barriers:** Europe higher on consideration list. America is not that interesting as a travel destination (food, politics etc.) Poor exchange rates.

#### TRAVEL TIMING

**Plan:** 3-5 months prior to travel

**Book:** 3-5 months prior to travel

**Key Travel Months:** April - October (with a spike June thru September)

#### MASTER TASK

Drive to partner sites and tour operate to book



## INDIA

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Increase trip frequency and U.S. destinations visited amongst travelers visiting family.

#### GOALS:

- Increase U.S. visitation to 1,194,955 visitors, an increase of 14% from 2015 (projected) and 24% from 2014 to 2015.

#### PRIMARY SEGMENT

Affluent, urban travelers connecting with far-flung family & friends (-80% of Indian international travelers have family and friends in the US).

#### MOTIVATION

**Drivers:** Reconnecting with loved ones. All kinds of activities from shopping to camping & sightseeing. American pop culture is very appealing, which is perceived as glamorous.

**Barriers:** Time and effort required to plan the trip. More accessible destinations divide share of interest.

#### TRAVEL TIMING

**Plan:** 1-5 months prior to travel

**Book:** 1-5 months prior to travel

**Key Travel Months:** April - May; October - December

#### MASTER TASK

Dive deeper into DiscoverAmerica.com content.



## JAPAN

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Reinspire younger travelers to once again choose the USA.

#### GOALS:

- Increase U.S. visitation to 3,658,539, an increase of 1% from 2015 (projected) and 2% from 2014 to 2015.

#### PRIMARY SEGMENT

Young, urban adults (female skew) with international travel experience.

#### MOTIVATION

**Drivers:** Dining/gastronomy. Natural beauty (that can't be found in Japan - Vast landscapes, big mountains, deep woods. Local culture (history and pop references)

**Barriers:** Not easily accessible. The USA is not perceived to be as "sexy" as other destinations (Europe)

#### TRAVEL TIMING

**Plan:** 1-5 months prior to travel

**Book:** 1-5 months prior to travel

**Key Travel Months:** July -August; December - January

#### MASTER TASK

Drive to content hubs focused on Culinary and the Great Outdoors and to generate awareness of new opportunities.



## SOUTH KOREA

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Drive young travelers for a once in a lifetime trip.

#### GOALS:

- Increase U.S. visitation to 1,682,914, an increase of 9% from 2015 (projected) and 16% from 2014 to 2015.

#### PRIMARY SEGMENT

Young, urban, experienced travelers (female skew) who see travel as an opportunity to express burgeoning individuality, and bragging rights' of experiencing iconic destinations. The "ultimate trip."

#### MOTIVATION

**Drivers:** Natural landscapes. Dining/gastronomy. Iconic Destinations. Pop culture.

**Barriers:** More accessible destinations divide share of interest (AU). Travel to the US a is less special because of the distance. Many have already visited and seen the sights.

#### TRAVEL TIMING

**Plan:** 1-5 months prior to travel

**Book:** 1-5 months prior to travel

**Key Travel Months:** July -August

#### MASTER TASK

Drive to partner sites to book



## MEXICO

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Promote travel with families.

#### GOALS:

- Increase U.S. visitation to 18,861,763, an increase of 5% from 2015 (projected) and 9% from 2014 to 2015.

#### PRIMARY SEGMENT

Families with children with the means to travel not only to the USA but other destinations (e.g. Europe).

#### MOTIVATION

**Drivers:** Natural beauty, participation in leisure (shopping) and cultural activities (dining/shows, concerts).

**Barriers:** Poor exchange rates. USA is convenient and interesting, but not always welcoming.

#### TRAVEL TIMING

**Plan:** 3-5 months prior to travel

**Book:** 1-5 months prior to travel

**Key Travel Months:** June – August; December – January

#### MASTER TASK

Excite with new ways to enjoy the USA, and drive to partner websites to book



## UNITED KINGDOM

### 2016 MARKETING STRATEGY

#### 2016 OBJECTIVE:

Motivate travelers to return to the USA and discover new and exciting experiences.

#### GOALS:

- Increase U.S. visitation to 4,188,589, an increase of 4% from 2015 (projected) and 5% from 2014 to 2015.

#### PRIMARY SEGMENT

Financially stable travelers (40+ Baby Boomers) that are U.S. enthusiasts seeking value, comfort, and convenience.

#### MOTIVATION

**Drivers:** The USA is a comfortable, easy to travel to destination that offers a mix of exciting urban life and incredible natural beauty.

**Barriers:** “Been there, done that” – there’s nothing new to see or do.

#### TRAVEL TIMING

**Plan:** 1-12 months prior to travel

**Book:** 1-12 months prior to travel

**Key Travel Months:** April – September (with a spike in the summer months)

#### MASTER TASK

Refer to partner websites, activate with airlines, OTAs, or tour operators.

## NEW MARKETS FOR FY2016



### CHILE

#### 2016 MARKETING STRATEGY

**GOALS:** Increase U.S. visitation to 294,352, an increase of 11.3% from 2015 "projected".

**PRIMARY SEGMENT:** Young, affluent urban families

**MASTER TASK:** Explore deeper into discoveramerica.com partner sites.



### COLOMBIA

#### 2016 MARKETING STRATEGY

**GOALS:** Increase U.S. visitation to 1,063,108, an increase of 11.9% from 2015 (projected).

**PRIMARY SEGMENT:** Young, affluent urban families

**MASTER TASK:** Explore deeper into DiscoverAmerica.com.



### SWEDEN

#### 2016 MARKETING STRATEGY

**GOALS:** Increase U.S. visitation to 589,079, an increase of 4.8% from 2015 (projected).

**PRIMARY SEGMENT:** Younger urban professionals

**MASTER TASK:** Refer to partner sites and DiscoverAmerica.com with a focus on the great outdoors

## FY2016 TRADE OUTREACH

Brand USA Trade Outreach programs include targeted trade events, sales missions and professional tour opportunities that promote U.S. travel and tourism interests on a global scale. Through Brand USA's trade outreach programs, partners are able to connect with key travel trade influencers who book travel to the USA.

From access to thousands of leading travel buyers and influencers at USA-branded pavilions during large-scale trade shows to the opportunity to connect with travel professionals one-on-one during sales mission to our ever-popular MegaFam trips that promote U.S. destinations, travel brands and attractions to, through and beyond the gateways, Brand USA's Trade Outreach programs educate, inform and motivate travel buyers around the world. These interactions provide partners valuable and direct exposure to the travel industry's most influential professionals.

### During FY2016, Brand USA will deploy trade outreach in the following markets:

- Austria
- Benelux Region (Belgium, Luxembourg, Netherlands)
- Central America\*
- Hong Kong
- Hungary
- Italy
- Israel
- Nordic Countries\*
- South Africa
- South America\*
- Southeast Asia\*
- Spain
- Switzerland
- Taiwan
- Gulf Cooperation Council (GCC) Countries\*

*\* select markets*

### Trade Shows

Throughout the year, Brand USA hosts a series of USA-branded pavilions at influential travel and trade shows—providing participating U.S. exhibitors the opportunity to reach 1.6 million international travel buyers and inspire future travel to the United States.

Brand USA serves as the unifying element at these shows, representing U.S. travel and tourism interests on a global scale, with destinations, travel brands and other organizations of all shapes and sizes participating as exhibitors. Participating organizations retain their own identity yet benefit from being part of a more visible, collaborative United States effort. To further amplify the USA's and participating partners' presence, Brand USA also organizes related events before, during and after many of these shows.

Unified Brand USA pavilions provide exhibitors:

- Market analytics and insights
- Marketing, advertising, public relations activities and media exposure
- Increased global exposure
- Customer engagement and entertainment opportunities
- Marketing, advertising and public relations activities
- Brand USA-hosted events before, during and after the show to build excitement and engagement
- Global exposure to both consumers and trade professionals

During FY2016 Brand USA Pavilions will be scheduled at the following tradeshow

Event	City	Country	Dates
<b>*IFTM Top Resa</b>	Paris	France	September 29-October 2, 2015
<b>International Golf Travel Market</b>	Tenerife	Spain	October 5-8, 2015
<b>TTG Incontri</b>	Rimini	Italy	October 8-10, 2015
<b>ITB Asia</b>	Singapore	Singapore	October 21-23, 2015
<b>WTM</b>	London	England	November 2-5, 2015
<b>IBTM World</b>	Barcelona	Spain	November 17-19, 2015
<b>*Vakantiebeurs</b>	Utrecht	Netherlands	January 13-17, 2016
<b>FITUR</b>	Madrid	Spain	January 20-24, 2016
<b>SATTE</b>	New Delhi	India	January 29-31, 2016
<b>GITF</b>	Guangzhou	China	February 25-27, 2016
<b>ITB - Berlin</b>	Berlin	Germany	March 9-13, 2016
<b>IMEX</b>	Frankfurt	Germany	March 9-13, 2016
<b>WTM Latin America</b>	São Paulo	Brazil	March 29-31, 2016
<b>ATM</b>	Dubai	UAE	May 2-5, 2016
<b>NEXT Travel Trade Exchange</b>	Mexico City	Mexico	May 2016
<b>HITS</b>	Seoul	South Korea	June 2016
<b>*ITE</b>	Hong Kong	China	June 2016
<b>IPW</b>	New Orleans, Louisiana	USA	June 18-22, 2016
<b>World Routes</b>	Chengdu Century City	China	September 25-27, 2016
<b>FITA</b>	Mexico City	Mexico	September 2016
<b>*IFTM Top Resa</b>	Paris	France	September 2016
<b>ABAV</b>	São Paulo	Brazil	September 2016
<b>JATA</b>	Tokyo	Japan	September 2016

Trade shows by date: <http://thebrandusa.com/Events/Tradeshows/By%20Date>

\*Brand USA will be participating or supporting this show with Visit USA

Note: Schedule subject to change.

### Sales Missions, Road Shows, and Themed Events

Another essential component of Brand USA's trade outreach includes sales missions. These Brand USA-hosted events invite travel industry professionals in key markets to meet with U.S. organizations at a designated international location. Through a series of planned events, Brand USA and sponsor partners are able to connect directly with international travel buyers, including tour operators, airlines, travel agents, incentive and meeting planners and media, and provide a more in-depth look at U.S. destinations and experiences in order to increase travel bookings to the United States.

Our outreach also includes taking participants directly to the travel trade in international markets via Road Show events. Brand USA and partner organizations are able to connect directly with tour operators, travel agents and other travel buyers through a series of seminars, receptions and events where participating partners acquire the knowledge and information needed to better promote the United States as a travel destination.

Based on market need and opportunity, Brand USA also organizes custom themed events in key international markets that position and promote the United States as the go-to travel destination.

These events are generally celebratory programs, themed around specific holidays and experiences to help promote destinations, travel brands and other organizations.

### Training Initiatives & Seminars

Two distinct Brand USA travel trade training initiatives provide the tools and information our international travel buyers need in order to sell, up-sell and cross-sell U.S. travel destinations and experiences.

#### USA Discovery Online Training Platform

This experience-based, hands-on training platform features a variety of destination and experience modules to inspire and motivate the travel industry to sell “this land like never before.” Travel agents and tour operators earn specialist badges as they complete each section.

#### Training Seminars

Brand USA also presents in-market training seminars that focus on a specific experience or region in the United States—providing a targeted approach to promoting U.S. travel destinations.



### USA Discovery Program

The USA Discovery Program is an online training tool that educates travel professionals about the diverse destinations and experiences available in the USA to help them sell travel to the United States. Tour operators, travel agents and other travel experts can find straightforward information on U.S. regions, states and territories, as well as experiences and holiday themes. Travel professionals gain a comprehensive understanding of the USA, in general, as well as information about destinations and experiences to, through, and beyond the gateways. This increased knowledge enables and encourages cross-selling opportunities as travel professionals promote and book travel to the USA for their traveling clients. Agents take interactive quizzes to earn a variety of USA Specialist badges, which recognize agent-expertise in eight U.S. experience areas: Big City Buzz; Coastal Escapes; the Great Outdoors; Fly-Drive Journeys; Winter Sports; Music, Culture & Heritage; Food & Drink; and Family Holidays. The USA Discovery online training platform currently has nearly 8,000 members and is active in the following markets:

- Australia and New Zealand
- Brazil
- India
- United Kingdom and Ireland

During FY2016, the program will roll out in China, France, South Korea, and Mexico, as well as the Nordic countries (Denmark, Finland, Iceland, Norway, and Sweden).

### MegaFams and Other Familiarization Tours

Familiarization tours, or “fams,” with the travel trade are an integral part of the organization’s marketing strategies to create awareness of the diverse destinations and travel experiences available throughout the United States. The Brand USA fam tours are called “MegaFams” because they are the largest multi-itinerary simultaneous familiarization tours conducted in the United States.

Brand USA organizes and coordinates these diverse U.S. travel experiences in order to more fully promote multiple destinations. They are especially effective in motivating the travel trade to sell beyond-the-gateway experiences to their clients, because the itineraries include a broad range of travel experiences, attractions and brands from the popular gateway cities to off-the-beaten-path encounters.

Through Brand USA MegaFam experiences, travel agents and tour operators become better informed, empowered and inspired to sell a multitude of U.S. destinations to, through and beyond the gateways.



## MEDIA AND PUBLIC RELATIONS OUTREACH

During FY2016, Brand USA will continue to work with media outlets to promote the entirety of the United States and offers a number of programs that provide partners opportunities to increase awareness and inspire travel to their destinations through the power and credibility of earned media coverage. Key storylines will support the premier of the giant-screen film celebrating the centennial of the National Park Service, as well as the launch of our urban excitement platform and the expansion of our culinary and great outdoors platforms. We also will expand the use of our online newsroom platform and enhance our media familiarization tour strategy through the development of MegaMedia Fams similar to those we conduct with the travel trade.

In addition, through our newly formed partnership with Red Robot, Brand USA will offer destinations the opportunity to deliver compelling news content directly to credentialed journalists, bloggers, and key influencers on a global scale in an effective and economical way. Content distribution with Red Robot will include targeted release of editorial content and videos direct to Reuters, Bloomberg, and via PR Newswire to Associated Press (AP) reaching 2,500 subscriber sites and over 500,000 international journalists in broadcast, print and digital in over 120 countries.

We also will continue our association with Emmy-award winning journalist Peter Greenberg, who is producing a special documentary series featuring stars of film, television, music, and sports. Together with Peter, these well-known and beloved celebrities provide viewers special tours of the favorite places, including the states where they live, were born or were raised.

## IN-MARKET COLLABORATION WITH VISIT USA COMMITTEES AND THE U.S. COMMERCIAL SERVICE

During FY2016, Brand USA will continue to strengthen its relationship and collaboration with the U.S. diplomatic community through the U.S. Foreign and Commercial Service and Visit USA committees around the world. We will leverage the in-market expertise of these groups and support their programs through collaborative efforts in markets where Brand USA has established international representation and expand our efforts to select markets where we are not currently represented.

Program areas will include the sharing and development of marketing brochures and other collateral, as well as market research and analytics; the deployment of sales mission and road shows; the enhancement of USA pavilions at international trade shows; and the expansion of public relations; and other efforts.



## CO-OP MARKETING PROGRAMS

Co-op marketing programs will make up the majority of our consumer marketing efforts in FY16 to increase awareness, engagement, visitation, and spend.

Nearly 90 percent of our co-op marketing activities are directly focused on reaching the international traveling consumer.

This year and going into next year, our co-op programs are more heavily weighted toward delivering compelling content rather than the once-traditional course of advertising in order to connect with travelers in the way they shop today. Content marketing has changed the way people research, consider, and make buying decisions for products and services.

One of the key benefits of this approach in addition to its effectiveness is that both large and small destinations and organizations can participate cost effectively. Add to that the benefits of leveraging the scale that Brand USA provides, and the value proposition increases exponentially.

There are three paths to value through our co-op marketing platforms and programs:

- Brand USA Originals (programs developed and offered exclusively by Brand USA)
- Brand USA Affinity Programs (marketing platforms developed with media, publishers, and travel booking partners)
- Market-Specific Programs (programs offered in select markets to support market launches or expansion)

## BRAND USA ORIGINALS

### **Online, print, video, social—connect with the world's travelers**

Brand USA Originals are just that—marketing programs developed and offered exclusively by Brand USA. Some are proprietary programs developed by Brand USA, and some are created in partnership with influential travel media and major travel and lifestyle brands. All are designed to bring value and exposure to our partners with likely travelers and influencers in the most productive markets around the world.

### **Great Outdoors**

To align with the centennial celebration of the National Park Service, Brand USA is investing in a multi-million dollar strategy focused on the great outdoors. Initiatives, which began in mid-2015 and will run through fiscal year 2016, include an internationally released giant-screen film featuring the national parks supported by a digital content hub and thematic programs.

**Grant Screen Film: *National Parks Adventure***

A dazzling visual celebration of America's majestic National Parks, *National Parks Adventure* takes audiences on the ultimate off-trail adventure into the nation's awe-inspiring great outdoors and untamed wilderness. Spectacularly wild and beautiful places like Yosemite, Yellowstone, the Everglades, the Redwoods, Arches, and Canyonlands are illuminated as never before with the power of IMAX® 3D camera imagery.

Audiences will drop into the adventure with world-class mountaineer Conrad Anker as he leads a team of explorers through the nation's mountains and canyons. Then travel back in time to America's most famous camping trip where President Theodore Roosevelt, in the company of celebrated conservationist John Muir, vowed to create a vast system of National Parks. Released in time for the Centennial Anniversary of the U.S. National Park Service, *National Parks Adventure* reveals a tapestry of natural wonders that will inspire the adventurer in all of us.

The film will be released globally in February 2016 and will be supported by marketing campaigns in various international markets, potentially including print, radio, digital, television and out of home media buys. Many Brand USA programs, including the Inspiration Guide and multi-channel campaigns, will specifically feature the film. In addition, Brand USA partners will have the opportunity to showcase their destination's outdoors experiences at film premieres around the globe.

***Outdoors Hub***

Brand USA's Outdoors Hub highlights outdoor experiences, urban adventures, rural exploration, attractions, sightseeing and more. Co-op opportunities for Brand USA partners include video and written content creation supported by social media promotion and traffic generation. The social media and traffic generation is available in Australia, Canada, Germany and the UK. The hub is translated into eight languages.

**Travel Channel International**

To support Brand USA's Outdoors initiative, Travel Channel International has partnered with MacGillivray Freeman Films to create an 8-part TV series to share the natural wonders of the United States. This TV series, entitled "America the Beautiful," will premiere in Fall 2015 and will provide opportunities for partners to air promotional spots on the Travel Channel's international feed in Europe and other markets. Featured destinations include:

- Arizona
- California
- Caribbean
- Florida
- Montana
- New York
- Oregon
- Utah
- Wyoming

## Multi-Channel Programs

Brand USA offers extraordinary value to partners with its official multi-channel program. Co-op marketing partners can take advantage of a combined digital, print, social, video and activation element program instead of creating their own targeted campaigns. Programs are tailored to each international market and Brand USA ensures that targeted messages reach international travelers via the media they rely on most. Timing is based on the travel planning lifecycle in each market. Customized calls to action via market-specific activation partners take consumers through the purchase funnel from the inspiration phase to the booking phase. Activation partners include: Thomas Cook, HIS, Despegar and Expedia. Markets available in 2016:

- Australia: Spring (Feb/Mar) & Fall 2016 (Sep/Oct)
- Brazil: Fall 2015 (Oct/Nov) & Spring (May/June) 2016
- Canada East: Winter (Dec 15/Jan 16) & Spring (Apr/May) 2016
- China: Fall (Oct/Nov) 2015 & Spring (May-Jul) 2016
- France: TBD Spring 2016
- Germany: Fall (Nov/Dec) 2015 & Spring (Apr/May) 2016
- Japan: Spring 2016 (Apr/May)
- Mexico: Fall 2015 (Oct/Nov) & Spring (May/June) 2016
- United Kingdom: Fall 2015 (Sep/Oct) & Winter 2016 (Jan/Feb)

## Discover America Inspiration Guide

Brand USA's Inspiration Guide shows visitors from around the world the richness and diversity of travel in the United States. The guide is localized in 13 different print and digital versions. Participating partners have the opportunity to promote their destinations or travel-related businesses in dedicated theme-based sections, including: retail, golf, ski, great outdoors or culinary. In 2015, more than 575,000 print copies were created in 10 languages for distribution in 23 markets, and garnering more than 30 million online impressions. The 2016 guide is expected to be distributed in the following markets:

- Primary: Austria, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Ireland, Japan, South Korea, Mexico, New Zealand, Switzerland, Taiwan, United Kingdom
- Secondary: Argentina, Belgium, Colombia, Costa Rica, Denmark, Finland, Guatemala, Italy, Luxemburg, The Netherlands, Norway, Singapore, South Africa, Spain, Sweden
- Tertiary: Chile, Croatia, Czech Republic, Dohar, Dubai, Egypt, El Salvador, Greece, Honduras, Hungary, Indonesia, Israel, Kazakhstan, Nicaragua, Panama, Peru, Philippines, Portugal, Qatar, Romania, Russia, Saudi Arabia, Slovakia, Thailand, Turkey, Ukraine, Uruguay

**Guides will be in market on a rolling schedule:**

- January 2016: Canada
- February 2016: France, Germany, United Kingdom
- March 2016: Brazil, Mexico
- April 2016: Australia, China, Hong Kong, India, Japan, South Korea, Taiwan

**Reach by version:**

- Canada (English): 50,000
- United Kingdom, Ireland, Scandinavia, Europe, EMEA (English): 155,000
- Germany, Austria, Switzerland (German): 85,000
- Quebec (French Canadian): 15,000
- Mexico, Latin America (Global Spanish): 40,000
- Brazil (Portuguese): 21,000
- India (English): 21,000
- Australia, New Zealand (English): 30,000
- Japan (Japanese): 25,000
- South Korea (Korean): 18,000
- China, Hong Kong, Taiwan (Simplified Chinese): 110,000

**Culinary**

Brand USA's culinary initiative is designed to increase visitation to the USA by showing new ways to discover and indulge in the United States' range of culinary experiences.

**Culinary Hub**

The Culinary Hub uses a mix of expertly curated content and insightful news-style stories and articles to help broaden the international view of U.S. cuisine. The hub provides a place to showcase content from Brand USA partners and act as a go-to resource for international travelers looking to learn more about different cuisine, restaurants, food festivals and chefs found across the United States. This hub is supported by Brand USA's range of paid, earned and social media campaigns, including Instagram mapping on DiscoverAmerica.com. The site is translated into eight languages.

Co-op opportunities include custom, culinary-themed content, including itineraries, local stories and other location-specific culinary delights. Hosted culinary-themed videos spotlighting a destination's food experiences are also available.

### Culinary Guide

For the third year in a row, Brand USA will produce “Flavors of the USA”, a print and digital guide highlighting culinary experiences across the United States. A total of 115,000 print guides will be produced in Global English and two other languages to be named later. The guides will be distributed through in-country culinary events and U.S. embassies.

### Travel Channel International: Jeni and Olly Television Series

Brand USA is partnering with Travel Channel International for the second iteration of the Jeni & Olly series, this time featuring two separate culinary and spirit adventures. British broadcast personalities and food/drink experts Jeni Barnett and Olly Smith will once again travel through Oregon and California in their West Coast Wine Adventures series. They will also travel to Kentucky, South Carolina and Louisiana in their Deep South Food Adventures series. Each episode is thirty minutes and focuses on a specific state. Both series will air in Fall 2015 on the Travel Channel International in Europe, Asia and other markets globally.

### Chef Vignettes

Brand USA is developing a second round of 2-minute video vignettes to highlight renowned chefs and the destinations where they work or live, to air on *Food Network International*. Each vignette will feature footage from the destination as well as a chef cooking and sharing how the cuisine of their city, town or region inspires them. Brand USA will also offer partners the opportunity to utilize the vignettes on their own digital channels.



## Golf Video & Distribution Platform

Brand USA offers partners interested in increasing their share of the lucrative golf-vacation market the opportunity to participate in its multi-channel golf extension campaigns. Leveraging the reach of the multi-channel components combined with Brand USA's Discover America ESPN Sports Hub, messages are delivered directly to qualified golf prospects through digital and print channels with an activation strategy. The program offers targeted digital messaging via proprietary databases, websites and social channels, in addition to TV advertising on dedicated golf channels - complete with measurement data post campaign. Phase 1 of the golf extension launches in September 2015 in the United Kingdom with other markets to be announced.

## Discover America Global Websites

The Discover America in-language sites are designed to help inspire international visitors and travel influencers to choose U.S. travel destinations, travel providers and experiences.

There are several ways Brand USA showcases destinations, including:

- **City/State/Region Pages:** Destination-specific content promoted on all of Discover America's in-language sites
- **Experience Pages:** Experiential content promoted on all of Discover America's in-language sites with stories and other content about activities specific to a destination or brand



## Trade Partner Promotion

Brand promotions through the sections under the 'Plan' tab, the USA Map, and destination pages drive traffic to activate on participating partners' sites. Discover America in-language sites are active in the following markets: Australia, Brazil, Canada (English and French), Chile, France, Germany, India, Japan, South Korea, Mexico, as well as the United Kingdom.

## GoUSA Multiple-Platform Website

Brand USA offers opportunities for destinations and travel brands interested in expanding their reach to China and Taiwan, the fastest-growing markets of visitors to the United States, through its Chinese-language sites GoUSA.cn and GoUSA.tw. Responsively designed and built to attract and engage Chinese travelers, these websites offer turn-key opportunities for destinations and travel brands to establish a presence or enhance their impact in these fast-growing emerging markets.

Opportunities include:

- A campaign page or custom subsite with unique activity listings and a video/photo gallery, promoted through blog posts and social posts
- Syndicated blog posts on leading Chinese travel online channels
- Custom social campaigns that convert visitors by sending them to dedicated landing pages or social channels
- Traffic generation and content promotion strategies on the most popular online media channels: PPTV, Qunar, Sina Weibo and Tudou



### In-Language Videos & Content Program

Brand USA's In-Language content program creates and promotes in-language multimedia content to help promote U.S. destination experiences to international travelers. In addition to Brand USA's channels, participating partners may also distribute content through their own marketing channels.

Video and other content are customized to the targeted international travelers' points of view and interests based on Brand USA's experience pillars (Culture, Indulgence, Great Outdoors or Urban Excitement). Native hosts (from Australia, Brazil, Canada, China, Colombia, France, Germany, Hong Kong, Italy, Japan, South Korea, Mexico, Netherlands, Russia, Taiwan, or the United Kingdom) reach target audiences with engaging, experiential content about selected destinations.

Additionally, Brand USA promotes the content through its digital channels:

- On dedicated content pages on the language-appropriate Discover America or Go USA site
- Through featured tiles on the applicable destination page on the language-appropriate Discover America or Go USA site
- On Discover America's YouTube channel

To maximize content reach, Brand USA also distributes content through enhanced video traffic generation platforms powered by Rocket Fuel, Outbrain and/or Facebook. Campaigns drive in-language content on the language-appropriate Discover America or Go USA site and are optimized regularly.

## **International Search Engine Marketing Program**

Search engine marketing (SEM) is a key component of Brand USA's international marketing efforts to maximize exposure of destination and travel brand websites with international travelers. Through this targeted and fully managed program, Brand USA helps participating partners optimize their search marketing budgets, drive more traffic to their websites and engage international travelers.

## **Brand USA Great American Road Trips: Social Media and Content Activation**

Capitalizing on the popularity of the quintessential road trip, Brand USA will once again offer and promote its Great American Road Trips series on its digital and social media channels to spotlight U.S. destinations. The campaign will feature at least five road trips and will be supported by local and global blogs and social media coverage across 12 markets on Discover America's social channels and websites.

## **Great American Road Trips Series with National Geographic**

Brand USA and National Geographic are teaming up again for the Great American Road Trips series, featuring three new and diverse routes to inspire travelers to explore the USA. This year, Brand USA is offering destinations the opportunity to participate in theme-based road trips, including family travel, culinary and urban experiences, or off-the-beaten-path locations and attractions hosted by one of three acclaimed National Geographic journalists. The journalists will explore, blog and share photos and videos of the destinations they visit along their road trips. Featured destinations will be included in a robust digital campaign on National Geographic's channels, with Brand USA further supporting the campaign with a digital content and promotion plan.

## **ESPN: USA Sports Hub**

Brand USA's multimedia campaign with ESPN highlights the diversity of sporting experiences available in the United States in a fresh and unexpected light. The program includes a global media campaign consisting of digital and television media as well as interactive content that lives on the brand new "United States of Sports" ESPN sports hub on DiscoverAmerica.com. This hub serves as the center of all sports entertainment content on the website, showcasing the professional and recreational sporting activities available in U.S. destinations.

## **Expedia: Choose Your American Adventure**

Expedia and Brand USA have partnered to create "Choose Your American Adventure," a content-driven digital marketing campaign designed to drive traffic to U.S. destinations. An interactive quiz invites travelers to answer a series of questions that match them to their dream destinations in the U.S. In addition to the quiz, this program offers activation opportunities to drive consumers to an Expedia destination-specific booking page. Program results can be measured in terms of visitor traffic, social engagements, and booking productivity—allowing participating partners to track progress of campaigns.

## Market Entry Program

Brand USA is proud to offer a suite of services designed to maximize promotional opportunities in China. The Brand USA Market Entry Program is an annual plan offering brands and destinations the opportunity to reach travelers in important growth markets by participating in existing Brand USA in-market initiatives. A variety of resources are available to participating partners, including access to Brand USA's in-market representatives to provide support for sales and marketing, travel trade research, marketing plan customization, travel trade marketing programs, public relations programs and quarterly reporting. The Market Entry Program is also being developed in India and will be available to partners in 2016.

## Consumer Market Profile Reports

Each year, Brand USA prepares proprietary market profile reports, which provide important insight into travelers' perceptions of the USA, as well as general travel behaviors and preferences. A detailed 100-page deck of research for each of the countries profiled is available with the option of customized tables. Information includes desired destinations; criteria for destination selection; perceptions of the USA and competitors; international travel behavior; influence of media channels on destination decisions; and general media consumption. Consumer profile reports are available for the following markets: Australia, Brazil, Canada, China, France, Germany, India, Japan, South Korea, Mexico, and the United Kingdom—with the Chile consumer profile report available soon.

## MEDIA RELATIONS

### Red Robot Media Distribution

Through this partnership with Red Robot, Brand USA offers destinations the opportunity to deliver compelling news content to influential media channels and distribution systems, including Reuters, Bloomberg, and PR Newswire's services, including distribution via Associated Press. Press releases and video news content will reach 2,500 subscriber sites and over 500,000 international journalists in broadcast, print and digital outlets in over 120 countries.

### Brand USA Media Network

Brand USA also offers partners access to the Brand USA Media Network powered by Brand USA's partnership with TravMedia. This robust platform reaches more than 25,000 travel journalists worldwide. The interactive online newsroom includes live feeds of news and published stories and the capability to post news releases and other announcements with photos, captions and related resources. Through use of this unique platform, destinations, attractions, and travel brands are able to connect and build valuable relationships with influential international journalists to help share compelling stories and inspire the world to visit the USA.

## AFFINITY PROGRAMS

Brand USA will partner with the following Affinity Partners in FY2016: Expedia, Orbitz Worldwide, TripAdvisor and *Essentially America*. All of these brands have partnered with Brand USA since 2012. Brand USA works with these media partners to create co-op marketing campaigns that promote Brand USA's destination, lodging, car rental and attractions partners. Expedia, Orbitz Worldwide and TripAdvisor run digital campaigns consisting of run-of-site banner advertisements, landing pages and other sponsored ads, while *Essentially America* offers 1/4, 1/2, or full-page ads in its print editions.

Digital Affinity Partners, including Sojern, Expedia, Orbitz Worldwide and TripAdvisor, will reach the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- Taiwan
- UK

*The Essentially America* program will be available in the following markets:

- Germany (circulation: 100,000)
- United Kingdom (circulation: 100,000)

In FY2015, Brand USA's Affinity programs ran more than 120 campaigns and garnered more than 536 million impressions.

During FY2016 Brand USA will further expand the Affinity program by developing more unique, custom programs for co-op partners.

## BRAND USA RESEARCH & ANALYTICS

Brand USA maintains a robust set of metrics that guide our global marketing strategy and activities. The metrics plan is designed to incorporate market intelligence as well as performance evaluation to continually improve the efficiency and effectiveness of our marketing efforts.

### BRAND USA RESEARCH & ANALYTICS METRICS

Research Type	Marketing Objectives	Metric Categories	Metric	Methodology	Source(s)	Reporting Frequency
Intelligence	Marketing Strategy	Marketing Intelligence	Traveler behaviors, Preferences and perceptions	Online survey, 1,500 completes per market	PhoCusWright	Annual
			Market share of outbound tourism from target markets	Actuals as reported by global government organizations	Oxford Economics, UNWTO	Annual
			Competitor advertising monitoring	Actual values	Media vendors	Annual
	Advertising Development	Creative Testing	Traveler reaction to ad creative	Online survey, 1,000 completes per market	Ipsos	Semi-Annual
Performance	Advertising Efficiency	Marketing Mix Optimization	Geographic distribution of ad units and cost	Actual values	Brand USA internal data plus media	Monthly
			Media channel distribution of ad units and cost	Actual values	Brand USA internal data and media vendors	Monthly
	Advertising Effectiveness	Dream	Total brand media Impressions	Actual values	Brand USA internal data and media vendors	Monthly
			Consumer destination	Online survey, 1,000 completes	ORC	Quarterly
		Consider	Clicks on digital ads	Actual values	Brand USA internal data and media	Monthly
			Website visitation	Actual values	Brand USA internal data	Monthly
	Search volume	Actual values	Data partner and general search engines	Monthly		
	Consumer intent to visit	Online survey, 1,000 completes per campaign	ORC	Monthly		

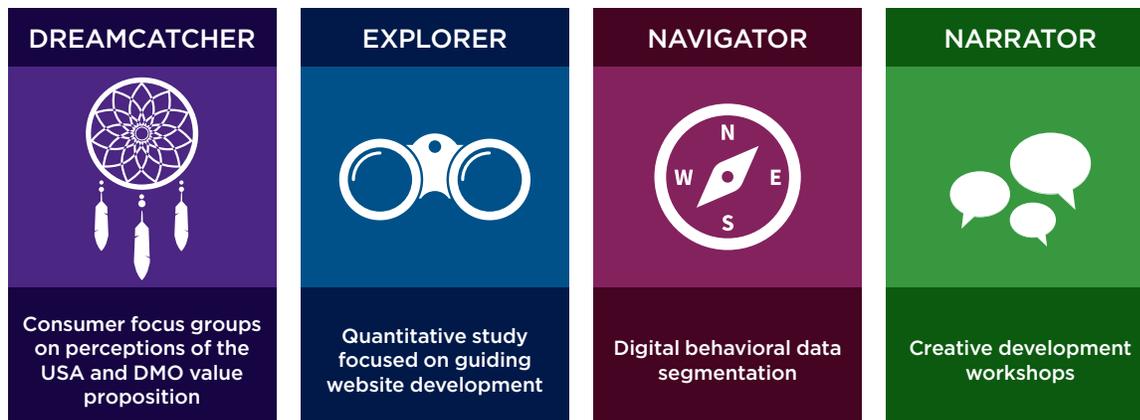
Research Type	Marketing Objectives	Metric Categories	Metric	Methodology	Source(s)	Reporting Frequency
Performance (continued)	Advertising Effectiveness (continued)	Activate	Booking trends	Booking data for airline tickets and hotels	Multiple data vendors	Monthly
		Travel	Total inbound visitation and expenditure by source market	I-94 data and paper survey sampling 0.2% of all international passengers	NTTO Dept. of Commerce	Annual
			Attributable increase in visitation and expenditure	Calculated utilizing consumer reaction to advertising, consumer engagement and market share	Oxford Economics	Annual
			Attributable increase in economic impact	Calculated based on attributable visitation and expenditure	Oxford Economics	Annual
		Share	Consumer net promoter score	Online survey, 1,000 completes per market	ORC	Quarterly
			Consumer Social Sharing	Actuals	Target Social Networks (Facebook, Twitter)	Monthly

## SPECIAL PROJECTS

In addition to ongoing activities, Research & Analytics executes special projects designed to guide specific initiatives. In FY 16, we will complete the last phases of Project Phoenix - Navigator and Narrator - and conduct our first comprehensive trade study.

### Project Phoenix

Project Phoenix was launched in 2014 to provide the groundwork for a new advertising campaign and website. The first phase, Dreamcatcher, was designed to capture qualitative consumer insights about the travel planning process and DMO value proposition. From there, Explorer leveraged the qualitative insights about travel planning to create a framework for testing website concepts. Navigator will be the next phase launched in FY 16. Navigator will also leverage insights from its previous phases, and is focused on consumer segmentation with the objective of providing a nuanced messaging architecture that leverages digital behavioral cues. Narrator will be the final phase of Project Phoenix, culminating in our new creative framework.



### Global Trade Study

Brand USA operates in vastly different commercial markets around the world. In order to support a comprehensive global development strategy, we are launching a multi-faceted trade study in FY 16. Utilizing both in-depth executive interviews and a survey of travel agents, the study will gather insights regarding the global competitive landscape, current US positioning, awareness and perception of “beyond the gateway” destinations, and partnership challenges and opportunities.

## TRACKING AND MEASURING RESULTS: THE DASHBOARD

DASHBOARD COMPONENT	METRICS & TARGETS (FY2015 numbers are projected as of 7/19/15)	METHODOLOGY	SOURCES	REPORTING FREQUENCY
TRAVEL LIFECYCLE Phase 1 Dream/ Awareness	<b>CONSUMER DESTINATION FAMILIARITY</b> <b>Target: 92.50% for FY2016</b> vs 92.0% for FY2014 and 91.6% for FY2015	Online survey identifying international travelers from Canada and Mexico, plus intercontinental overseas travelers who are likely to visit the USA in the next 12 months (1,000 completes per campaign market)	ORC International	Quarterly tracking
TRAVEL LIFECYCLE Phase 2 Consider/ Engagement	<b>WEBSITE &amp; SOCIAL ENGAGEMENT</b> <b>Target: 44.2 million engagements in FY2016</b> vs 40.1 million in FY2014 and 42.1 million in FY2015	Actual values	Brand USA internal data	Monthly tracking
	<b>CONSUMER INTENT TO VISIT THE USA</b> <i>(within next 2 years)</i> <b>Target: 67%</b> vs 63% in FY2014 and 62.1% in FY2015	Online survey (1,000 completes per campaign market)	ORC International	Monthly tracking
TRAVEL LIFECYCLE Phase 3 Activate/ Book	<b>ATTRIBUTABLE INCREASE IN VISITATION</b> <b>Target: 1.04 million incremental visitors</b> vs 903,440 in FY2014 and 1 million in FY2015 (and 81.5 million international visitors targeted by NTTO)	Incremental visitation results determined by an econometric analysis incorporating advertising impressions delivered, website and social engagements, consumer response to advertising, and U.S. market share.	Oxford Economics and the Department of Commerce (NTTO) Brand USA internal data	Annually
TRAVEL LIFECYCLE Phase 4 Travel	<b>ATTRIBUTABLE INCREASE IN SPEND, ECONOMIC IMPACT, AND JOBS SUPPORTED</b> <b>Targets:</b> <b>\$3.8 billion incremental spend</b> vs \$3.1 billion in FY2014 and \$3.4 billion in FY2015 (and \$240 billion in spend targeted by NTTO) <b>\$7.6 billion total economic impact</b> vs \$7.06 billion in FY2014 and \$7.3 billion in FY2015 <b>51,400 incremental jobs supported</b> vs 46,500 in FY2014 and 49,700 in FY2015	Incremental visitation and spend results determined by an econometric analysis incorporating advertising impressions delivered, website and social engagements, consumer response to advertising, and U.S. market share.  Economic impact results calculated based on attributable visitation and spend metrics	Oxford Economics and the Department of Commerce (NTTO) Brand USA internal data	Annually
	<b>MARKET SHARE</b> <b>Targets:</b> <b>6.75% share of global travel market</b> vs total share of 6.65% in FY2014 and 6.70% in FY2015 <b>13.70% share of long-haul travelers</b> vs 13.30% in FY2014 and 13.50% in FY2015	Actual values globally (total and long-haul)  Actual values by campaign market	NTTO UNWTO	Annually

## TRACKING AND MEASURING RESULTS: THE DASHBOARD

TRAVEL LIFECYCLE Phase 5 Share	<b>CONSUMER NET PROMOTER SCORE</b> <b>Target: 48%</b> vs 46.6% in FY2014 and 47.0% in FY2015	Online survey (1,000 completes per campaign market)	ORC International	Quarterly tracking
	<b>PERCENTAGE OF FEDERAL MATCH RECEIVED</b> <b>Target: 100%</b> vs 100% in FY2014 and 100% in FY2015	Actual values	Brand USA internal data	Quarterly tracking
FINANCIAL Revenue	<b>RATIO OF CASH/IN-KIND CONTRIBUTIONS</b> <b>Target: 70% in-kind; 30% cash</b> vs 69%/31% in FY2014 and 70%/30% in FY2015	Average contribution per partner Ratio of cash & in-kind contribution	Brand USA internal data	Quarterly tracking
	<b>VALUE PROVIDED BY PARTNERS</b> <b>Targets: 525 partners; 90%+ retention rate</b> vs 551 partners in FY2014 and 525 partners in FY2015 and maintaining 90% partner program retention	Increase in total number of partners Partner program retention rate	Brand USA internal data	Quarterly tracking
PARTNER-SHIP VALUE	<b>COMPLIANCE</b> <b>Target: 100%</b> vs 100% in FY2014 and FY2015	Percentage compliance to policies and procedures	Brand USA internal data	Quarterly tracking
	<b>CYCLE TIME</b> <b>Targets: 85 days cash; 120 days in-kind</b> vs 89 for cash and 124 for in-kind in FY2014	Average number of ESTA/matching fund filing days from submission to Commerce to receipt of funds	Brand USA internal data	Quarterly tracking
COMPLIANCE & PROCESS				

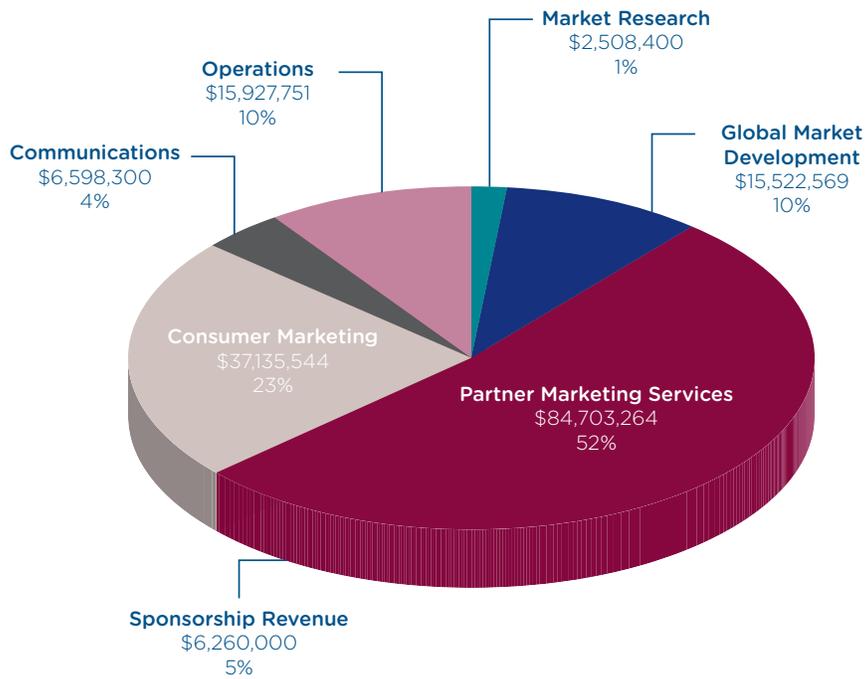




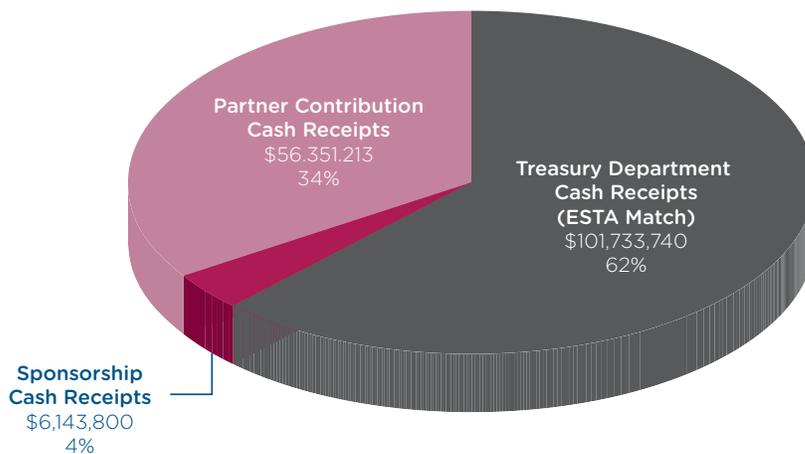
Budget

## BUDGET

### FY 2016 EXPENSE BUDGET



### FY 2016 RECEIPTS FORECAST



## EXPLANATION FOR BUDGET ITEMS OVER \$500,000

Agency/Project	Budgeted Amount	Description
SDL	\$750,000	Translation services
Mailman Group	\$1,100,000	Development, design, maintenance, and social strategy for web presence in China.
Sparkloft	\$2,000,000	Social community management and content creation.
Mediacom (Facebook)	\$2,000,000	Social media advertising in all markets
Mediacom (Twitter)	\$1,000,000	MediaCom - for social media advertising in all markets
Google (Direct)	\$1,000,000	Paid search for all consumer markets
Farragut Center LLC	\$13,351,654	10-year lease for office space (should we include the full ten years or the merely the next year? Technically, it's one agreement, but it touches 10 different budgets)
Mediacom	\$500,000	Media planning and buying services
Manifest	\$1,000,000	Content strategy and design development
Avia Reps - Japan	\$1,000,000	Representation and trade activation in Japan
Avia Reps - Korea	\$750,000	Representation and trade activation in Korea
Avia Reps - China	\$1,000,000	Representation and trade activation in China
Black Diamond	\$1,000,000	Representation and trade Activation in the United Kingdom and Ireland
Brand Masters	\$750,000	Representation and trade Activation in Germany, Austria, and Switzerland
Brand Story	\$600,000	Representation and trade Activation in Hong Kong/ Taiwan
Gate 7 Ltd	\$900,000	Representation and trade Activation in Australia and New Zealand
Ogilvy Public Relations		Representation and trade activity in Brazil
Ogilvy Public Relations	\$600,000	Global communications and public relations
Red Robot	\$1,160,000	Earned media and public relations placements
Sartha Marketing	\$500,000	Representation and trade activation in India
U.S. Travel Association	Range of \$500,000 to \$1,000,000	Premier Sponsorship of IPW
Trade Design and Communications Development RFP	Range of \$500,000 to \$1,250,000	Design and Communications vendor
Agency of Record RFP	Range of \$2,000,000 - \$5,000,000	Global strategy, creative development and advertising services.
Consumer Website Design/ Development RFP	Range of \$500,000- \$2,000,000	Design, development, and maintenance of Brand USA consumer website.

Note: The expenditures that are built in to Brand USA's budget in developing the broad categories reported to the Department of Commerce are budgeted as opposed to actual expenditures. Some budgeted expenditures may correspond to specific contracts or commitments that are in place at the time that the budget is prepared or specific expenditures for which Brand USA expects to issue an RFP. Other budgeted expenditures may be for predictable specific expenditures because they are types of specific expenditures that are repeated from one year to the next. In cases where there is no contract in place, we've included an estimate based on prior years or budgeted figures that correspond to the agreement, but may not be an exact figure. Where no vendor is listed, we have provided a budget range so as not to interfere in the competitive bid process by providing bidders too much information. When the Brand USA budget is prepared, Brand USA does not know where or how a substantial portion of its marketing budget will be spent. Where and how marketing dollars will be spent depends on variables such as what ideas will interest partners, market research, exchange rates, discounts, travel trends and other similar factors. Even if Brand USA reasonably anticipated that it would spend \$X million promoting travel from the UK to the U.S., it often would not know during the budgeting process what specific expenditures it would make. These types of expenditures comprise the majority of Brand USA's budget.



# The Brand USA Team

## SENIOR LEADERSHIP



**Christopher L. Thompson**  
President & CEO



**Anne C. Madison**  
Chief Communications  
Officer



**Donald F. Richardson**  
Chief Financial Officer



**David Whitaker**  
Chief Marketing Officer



**Thomas Garzilli**  
Senior Vice President,  
Global Partner Marketing



**Stanley Mattos**  
Vice President,  
Operations



**Karyn Gruenberg**  
Vice President,  
Partner Programs



**Carroll Rheem**  
Vice President,  
Research & Analytics

## INTERNATIONAL REPRESENTATION



### Australia and New Zealand

#### Gate 7

Level 1, 97 Rose Street  
Chippendale NSW 2008 Australia  
+61 2 9356 2945

**Jo Palmer, Managing Director**  
jo@gate7.com.au

**Ollie Philpot, Director - Australia and New Zealand**  
ophilpot@thebrandusa.com.au

**Svetlana Monastyrsky, Account Manager - PR (Australia)**  
rebecca@gate7.com.au

**Tahnee Dobson, Account Manager - Trade (Australia)**  
tdobson@thebrandusa.com.au

**Wayne Mitcham, Account Manager - New Zealand**  
wmitcham@thebrandusa.co.nz

### Brazil

#### Ogilvy Public Relations

Pedrosa de Marais St.,  
2nd Floor  
São Paulo - SP  
+55 11 3024 9152

**Renata Saraiva, Managing Director - Trade Relations**  
renata.saraiva@ogilvy.com

**Carolina Cordioli, Account Director**  
carolina.cordioli@ogilvy.com

**Karen Almeida, Account Executive - Public Relations**  
karen.almeida@ogilvy.com

### Canada

#### Pulse Communications

Toronto Office  
5160 Explorer Drive - Unit 32  
Toronto, ON  
L4W 4T7

**Patrice Bell, Director - Travel Trade Partnerships**  
pbell@thebrandusa.ca

**Sana Keller, Director - Media & Public Relations**  
skeller@thebrandusa.ca

**Marissa Maheu-Mendes - Marketing Coordinator**  
mmaheu@thebrandusa.ca

## China

### Beijing Office

#### AVIAREPS Marketing Garden

Suite 81 Building 3, No.1 Xiushuijie of Jianguomenwai Diplomatic Compound, Chaoyang District Beijing, China 100600 (8610) 8532 5343

**Mavis Zheng, Office Director**  
Mzheng@aviareps.com

**Jenny Guan, Travel Trade Marketing Manager**  
jguan@aviareps.com

**Sunday Wang, Public Relations & Co-op Manager**  
SundayWang@aviareps.com

### Chengdu Office

#### AVIAREPS China

Zhong Hai International Center No. 177 Jiao Zi Avenue, Gao Xin District, Chengdu

**Vincent Tang - Travel Trade Marketing Manager**  
vtang@aviareps.com

**Phoebe Wang - Public Relations Manager**  
pwang@aviareps.com

### Shanghai Office

#### AVIAREPS Marketing Garden

JingAn New Century Plaza, Suite B, 18/F 881 Nanjing Road West (188 Wujiang Road) Shanghai, China 200041 (8621) 6359 1535

**Tina Yao, Office Director**  
tyao@aviareps.com

**Spring Zheng, Travel Trade Marketing Director**  
szheng@aviareps.com

**Anita Jia, Public Relations & Co-op Director**  
ajia@aviareps.com

### Guangzhou Office

#### AVIAREPS Marketing Garden

Suite 1214-1215, Main Tower,Guangdong International Building 339 Huanshi Road East Guangzho, China 510098 (8620) 8323 4332

**Isaac Wang, Office Director**  
iwang@aviareps.com

## Germany, Austria and Switzerland

### Brandmasters America OHG

Frankfurter Strasse 181 D-63263 Neu-Isenburg, Germany +49 6102 813 99711

**Martin Walter, Managing Director**  
Martin.walter@thebrandusa.de

**Christian Zerbian, Country Manager**  
Christian.zerbian@thebrandusa.de

**Michelle Bies, Marketing Assistant (Germany)**  
michelle.bies@thebrandusa.de

## Hong Kong

### BRANDSTORY INC

2/F, Shui On Centre, 6-8 Harbour Road Wanchai, Hong Kong +852 8177 6078

**Yvonne Ma, Partnership Manager**  
Yvonne.Ma@brandstory.asia

## India

### Sartha Global Marketing

2nd Floor, Sishan House, 119, Shahpur Jat New Delhi -110049, India +91 11 49210004

**Sheema Vohra, Managing Director**  
svohra@sarthaglobal.com

**Sunil Puri, Executive Director**  
spuri@sarthaglobal.com

**Namrata Bansal, Account Director - Public Relations**  
namrata.bansal@sarthaindia.com

**Karishma Sen, Account Manager - Travel Trade**  
ksen@sarthaglobal.com

## Japan

### AVIAREPS Marketing Garden

International Place, 26-3 Sanei-cho, Shinjuku Tokyo, Japan 160-0008 +81-3-3225-1835

**Yoichi Hayase, Japan & Asia Strategy Director**  
yhayase@aviareps.com

**Wataru Takaku, Travel Trade Director**  
wtakaku@aviareps.com

**Mika White, Public Relations/Promotions Manager**  
mwhite@aviareps.com

## Mexico and Central America

### Mexico City Office

#### Adnova

Gutenberg 176  
 Colonia Anzures  
 Delegación Miguel Hidalgo  
 México D.F., Mexico 11590  
 +52 55 5596 6142

**Benjamin Diaz, President**  
 bdiaz@adnova.com.mx

**Adriana de la Torre, Vice President**  
 adelatorre@adnova.com.mx

**Marcela Carmona, Account Manager – Trade and Public Relations**  
 mcarmona@adnova.com.mx

## South Korea

### AVIAREPS Marketing Garden

Dongwha Building 14F, 58-7  
 Seosomun-Dong, Joong-Gu  
 Seoul, South Korea 100-736  
 +82-2-777-2733

**Gina Choi, Marketing & Public Relations Account Manager**  
 gchoi@aviareps.com

**Irene Lee, Public Relations Director**  
 ilee@aviareps.com

**Justin Jung, Marketing & Public Relations Account Executive**  
 jjung@aviareps.com

## Southeast Asia

### Singapore Office

#### BRANDSTORY INC

146 Robinson Road, 311-02  
 Singapore 068909  
 +65 6391 9078

**Cheng Ee Shan, Partnership Executive**  
 Eeshan.Cheng@brandstory.asia

## Taiwan

### BRANDSTORY INC

6F-3, No. 41, Nanjing W. Rd., Datong Dist.,  
 Taipei City 103, Taiwan (R.O.C)  
 +886 2 2550 8882

**Reene Ho-Phang, Managing Director**  
 Reene@brandstory.asia

**Sam Chen, Partnership Manager**  
 Sam.Chen@brandstory.asia

**Molly Jou, Executive – Content Marketing**  
 Molly.Jou@brandstory.asia

**Gerain Leow, Executive – PR & Social Media**  
 Gerain.Leow@brandstory.asia

## United Kingdom and Ireland

### Black Diamond

15 Bedford Street  
 London WC2E 9HE, UK  
 +44 20 7240 4071

**Guy Chambers, Managing Director**  
 guy@blackdiamond.co.uk

**Jonah Whitaker, Strategy Director**  
 jonah@blackdiamond.co.uk

**Gerry Boyle, Travel Trade Director**  
 gerry@blackdiamond.co.uk

**Sarah Barnett, Public Relations & Communications Director**  
 sbarnett@thebrandusa.co.uk

**Allie Williams, Communications Manager**  
 awilliams@thebrandusa.co.uk

## BOARD OF DIRECTORS

Brand USA is governed by an 11-member Board of Directors appointed for a maximum of two consecutive three-year terms by the U.S. Secretary of Commerce in consultation with the Secretary of State and the Secretary of Homeland Security. As required by the Travel Promotion, Enhancement, and Modernization Act of 2014, all members of the board are United States citizens and are either current or former chief executive officers, chief financial officers, or chief marketing officers, or have held equivalent management positions. Designated members have leadership expertise in specific sectors of the travel industry including: hotel accommodations; restaurants; retail or a related association; travel distribution; attractions or recreations; state-level tourism office; city-level convention and visitors bureau; passenger air; land or sea transportation; and immigration law and policy. At least two members of the board are audit committee financial experts. In addition, at least five members of the board have expertise in international travel promotion or marketing broadly representing various regions of the United States.

In accordance with the above, the following business leaders at the time of publication of this annual report serve on the board of directors of Brand USA:



**Arne M. Sorenson**  
**Chair of the Board**

President & CEO,  
Marriott International, Inc.

*Represents: Hotel accommodations sector*

*Member: Finance Committee*



**Barbara J. Richardson**  
**Vice Chair**

Chief of Staff,  
Washington Metropolitan Area Transit Authority (WMATA)

*Represents: Land transportation sector*

*Chair: Marketing Committee*

*Member: Finance Committee*



**Andrew Greenfield**  
**Secretary**

Managing Partner, Fragomen,  
Del Rey, Bernsen and Loewy, LLP

*Represents: Immigration law and policy sector*

*Chair: Governance & Nominating Committee*

*Member: Finance Committee and Conflict of Interest Committee*



**Tom Klein**  
**Vice Chair**

President & CEO,  
Sabre Corporation

*Represents: Travel distribution sector*

*Chair: Audit Committee*

*Member: Finance Committee*



**Daniel J. Halpern**  
**Treasurer**

President & CEO,  
Jackmont Hospitality, Inc.

*Represents: Retail sector*

*Chair Finance Committee and*

*Conflict of Interest Committee*

*Member: Governance & Nominating Committee*



**Caroline Beteta**

President and CEO,  
Visit California  
*Represents: Official of a state  
tourism office*  
*Member: Marketing Committee*



**John Edman**

State Tourism Director,  
Experience Minnesota Tourism  
*Represents: Official of a state  
tourism office*  
*Member: Audit Committee and  
Marketing Committee*



**George Fertitta**

CEO,  
Bloomberg Associates  
*Represents: Official of a  
city-level convention and  
visitors bureau*  
*Member: Marketing Committee*



**Randy A. Garfield**

Retired/Former Executive Vice  
President, Worldwide Sales  
& Travel Operations, Disney  
Destinations, & President, Walt  
Disney Travel Co.  
*Member: Audit Committee and  
Marketing Committee*



**Mark Schwab**

CEO, Star Alliance Services  
GmbH  
*Represents: Passenger air  
sector*  
*Member: Audit Committee  
and Governance &  
Nominating Committee*



**Chef Roy Yamaguchi**

Owner & Founder  
Roy's Restaurant  
*Represents: Restaurant sector*  
*Member: Governance &  
Nominating Committee  
and Conflict of Interest  
Committee*

The board of directors and its committees meet regularly throughout the year. Members of the public are encouraged to participate by webcast and/or conference call. For more information about members of the Brand USA board of directors, regularly scheduled meetings or records of past board meetings, please visit: [TheBrandUSA.com/About-Brand-USA/Board-Of-Directors](http://TheBrandUSA.com/About-Brand-USA/Board-Of-Directors).

Board-related questions or comments can be addressed to [boardmeetings@thebrandusa.com](mailto:boardmeetings@thebrandusa.com).



Connect With Us

**To follow our progress and announcements of new initiatives, please connect with us on these social media channels.**

For industry or partner information about Brand USA, please visit or connect with us on the following Brand USA corporate channels:

- Website: [www.thebrandusa.com](http://www.thebrandusa.com)
- Twitter: @BrandUSA
- YouTube: <http://www.youtube.com/user/BrandUSATV>
- LinkedIn: <http://www.linkedin.com/company/brandusa>

For information about exceptional and unexpected travel experiences in the United States, please visit or connect with us on these Discover America channels:

- Website: [www.discoveramerica.com](http://www.discoveramerica.com)
- Twitter: @DiscoverAmerica
- Facebook: [Facebook.com/DiscoverAmerica](https://www.facebook.com/DiscoverAmerica)
- YouTube: <http://www.youtube.com/user/YourDiscoverAmerica>
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To subscribe to our industry newsletter, please visit [TheBrandUSA.com/Media/Newsletters](http://TheBrandUSA.com/Media/Newsletters)



1725 EYE STREET NW SUITE 800 WASHINGTON, DC 20006 202-536-2060

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