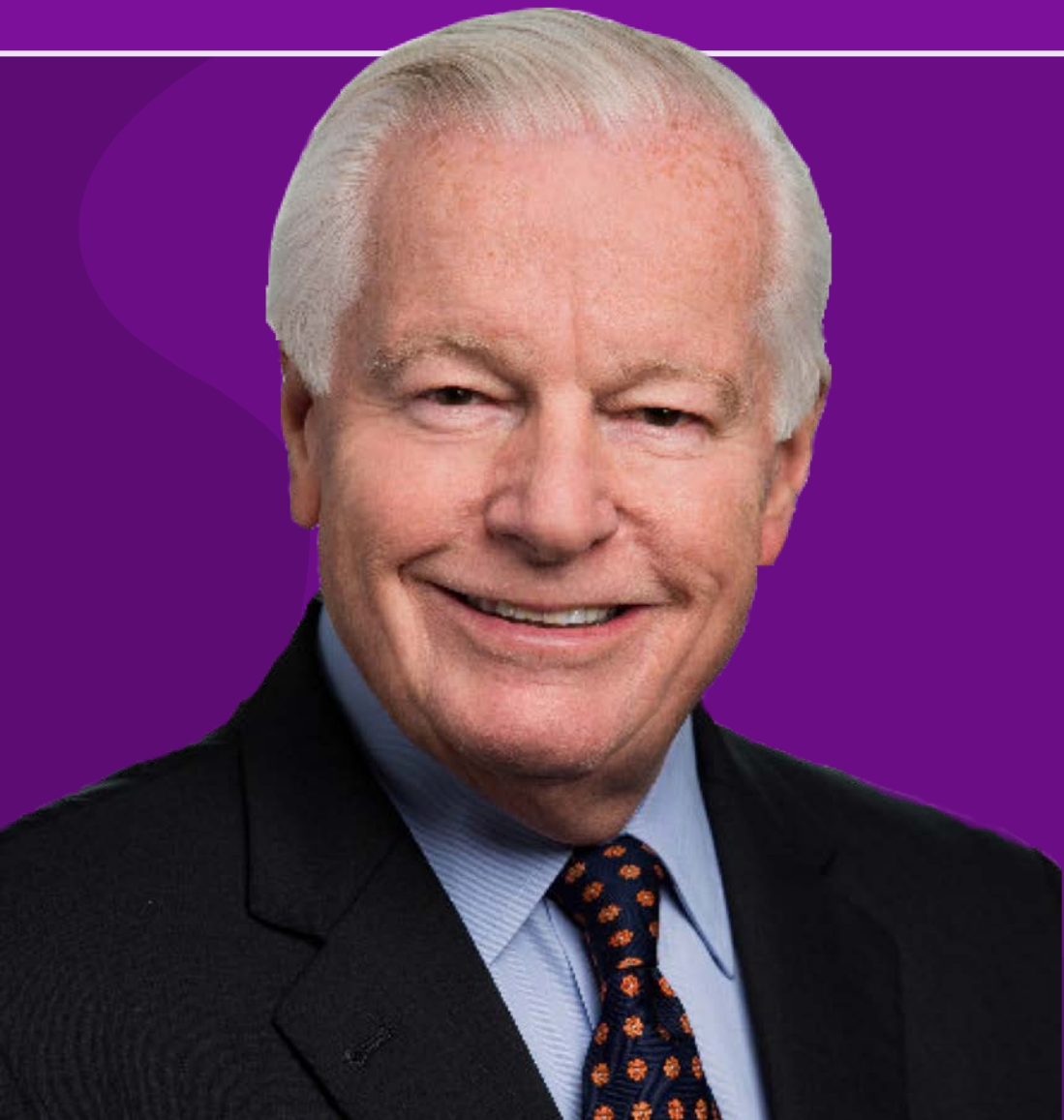




IPW 2019 Press Conference



U.S. Travel Association



Roger Dow

President & CEO

Brand USA



Chris Thompson

President & CEO

Brand USA Board of Directors



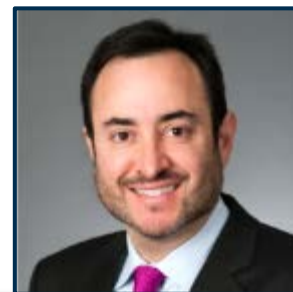
Barbara Richardson
Chair



John Edman
Vice Chair



Alice Norsworthy
Vice Chair



Andrew Greenfield
Secretary



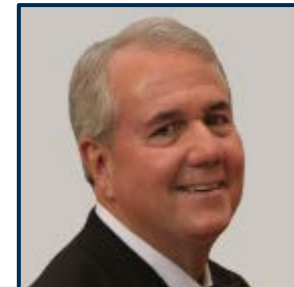
Kristen Branscum



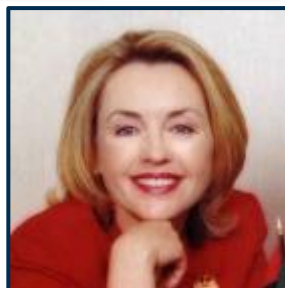
Paul Brown



Kyle Edmiston



Mike Gallagher



Noel Irwin Hentschel



Mark Hoplamazian

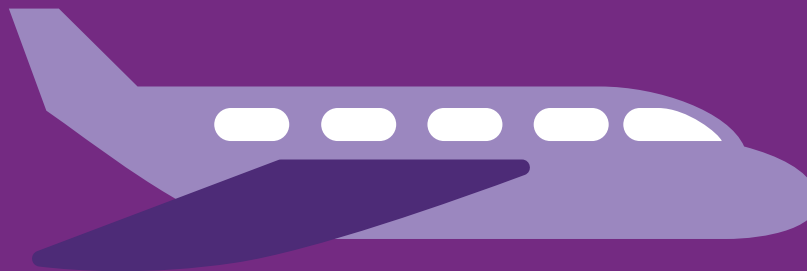


Thomas O'Toole

900+

partners

(with a 94%
retention rate)



More than
million+ viewers!

More platforms to

USA
VisitTheUSA.com

#VisitTheUSA

#VisitTheUSA

USA
VisitTheUSA.com

WELCOME

USA
VisitTheUSA.com

#VisitTheUSA

#VisitTheUSA

USA
VisitTheUSA.com

TO THE
USA

WELCOME
TO THE
USA

WELCOME
TO THE
USA



Travel Promotion Act becomes law

2010

Creating a world class organization – Brand USA

2011

Began to Evolve & Expand

2012

Founding
partners

International
Representation

International
Campaign

Building on success

2013

1st UK & Ireland
MegaFam

1st India
Sales Mission

USA Discovery
Program

ROI: **400**
partners

1.1 Million
visitors

\$3.4 Million
visitor spend

\$7.4 Million
Total economic impact

Proven Results Recongized

2014

20
countries

1st
Germany MegaFam

Reauthorized
Through 2020

Adding & creating value

2015

1st Brand USA-led
U.S.-China Tourism
Leadership Summit

Transitioned
Discover America to
VisitTheUSA.com

Partnerships with:
Expedia, Google, &
Travel Channel

Began production on
1st giant-screen film

1st Giant-screen film

2016

Global Release: National Parks Adventure

Connect audiences to American stories

2017

1st India
MegaFam

Launched
One Big Welcome

Relaunched
VisitTheUSA.com
in 8 languages

Production on
2nd giant-screen film

Together, we are generating results

2018

Global Trade

Partner Programs

Consumer Marketing

Global Trade Impact



16 Roadshows, **241** destinations, **4,073** travel agents

3 MegaFams, **190** travel agents, **90** U.S. destinations, **33** states
– from India, UK, Ireland, Australia, and New Zealand

17 trade shows, **720** U.S. destinations, **2,006** appointments

Global Trade Impact



4 sales missions, 140 U.S. destinations, 5,099 appointments

18 product fams, 1,084 international travel trade product managers, 54 U.S. destinations

USA Discovery Program: 26,043 new travel agents – total number of participating agents 29,661 active in 7 countries, Mexico, Australia, Brazil, China, India, New Zealand, UK, and Ireland

Partner Programs Results



Partners: up to **15%** to **982** through FY2018

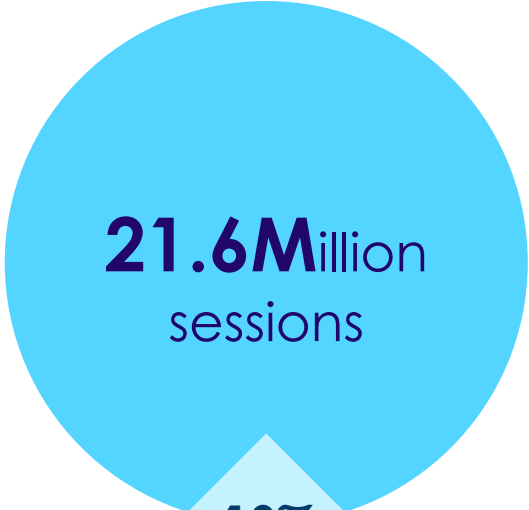
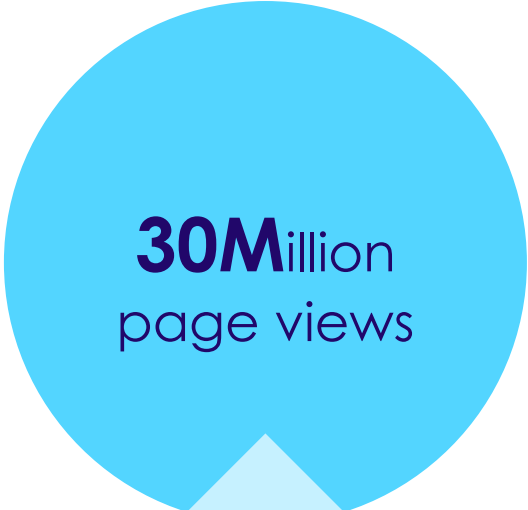
Inspiration Guides: nearly **550,000** printed, **13** languages, featuring **195** partners

142 in-language videos – **1/3** promoting rural America

13 multi-channel campaigns, **248** U.S. destinations & travel brands, **9** markets, total impressions **450+** million

Singles Day promotion, **5** U.S. destinations, **200+** million impressions

Original Programs Results



FY18 Results*

*Includes Non-U.S. traffic across Visit The USA languages with the exclusion of the China sites from January 1, 2018 – December 31, 2018.



Multi-Channel Program Performance

Australia	Brazil	Canada	China	Germany
India	Japan	Mexico	United Kingdom	



2.24 million
Total clicks



1.26 million
Total clicks, likes, & shares



8.6 million
Total bookings, post-view,
& post-click**

*Overview results include aggregate results for all Fiscal Year 2018 Multi-Channel programs with the exception of Mexico & China.

**Total gross revenue booked across Expedia Group brands after viewing or clicking on a Multi-Channel banner ad; 30-day look back window.

Hear The Music Success



1 SONG

Total Engagements:

20 Spotify destination playlists streamed **29,000+** times;
average **21** minutes per session

993 thousand paid & organic social engagements

1.8 million canvas opens

132 million paid & organic video views

\$5.8+ million in earned media value & **69** million earned
media impressions

After only one year

Go
USA

Content trends



11 videos

Average videos
views per user



32 Minutes

Average watch
duration

LOS ANGELES
NEW YORK

MEMPHIS
NEW ORLEANS

CHICAGO
MIAMI

NASHVILLE
AND MANY MORE



MacGillivray Freeman's
**AMERICA'S
MUSICAL
JOURNEY**

A story of culture, creativity and the music that shaped America

Narrated by **Morgan Freeman**

EXPEDIA PRESENTS A MACGILLIVRAY FREEMAN FILM "AMERICA'S MUSICAL JOURNEY" IN ASSOCIATION WITH BRAND USA
WRITTEN BY MORGAN FREEMAN, JEFF STEVE WOOD, PRODUCED BY SHAWN MACGILLIVRAY, DIRECTED BY GREG MACGILLIVRAY

FILED IN 15/70MM WITH IMAX® CAMERAS

MACGILLIVRAY
FREEMAN
FILMS

Expedia

GoUSA.tv

USA
Visit
The
USA

atamericasmusicaljourney.com

9

Countries

1.5

Media impressions

\$100

Million ad value

USA
VisitTheUSA.com

Brand USA's 2018 marketing efforts generated:

**1.13
Million**

**Incremental
Visitors**

**\$4.1
Billion**

**Incremental
Spend**

52,000+

**Incremental Jobs
Supported**

**\$1.17
Billion**

**Federal, State,
& Local Taxes
Generated**

**\$8.9
Billion**

**Total Economic
Impact**

RECORD

RECORD

RECORD

Over the past six years, Brand USA's marketing efforts have generated...

900+
partners

(with a 94%
retention rate)



6.6 million
incremental visitors



\$21.8 billion
incremental spending



nearly
52,000
incremental
jobs supported
each year

\$6.2 billion
federal, state &
local taxes



\$47.7 billion
total economic
impact



A nighttime photograph of a modern, multi-story building with a curved facade and a prominent glass tower. The building is illuminated from within, casting a warm glow. In the foreground, a wide, paved walkway is lined with tall palm trees, each with a small light fixture at its base. The walkway is decorated with blue lights and features a blue metal sculpture in the center. The sky is a deep twilight blue. The entire image is framed by a purple, textured border.

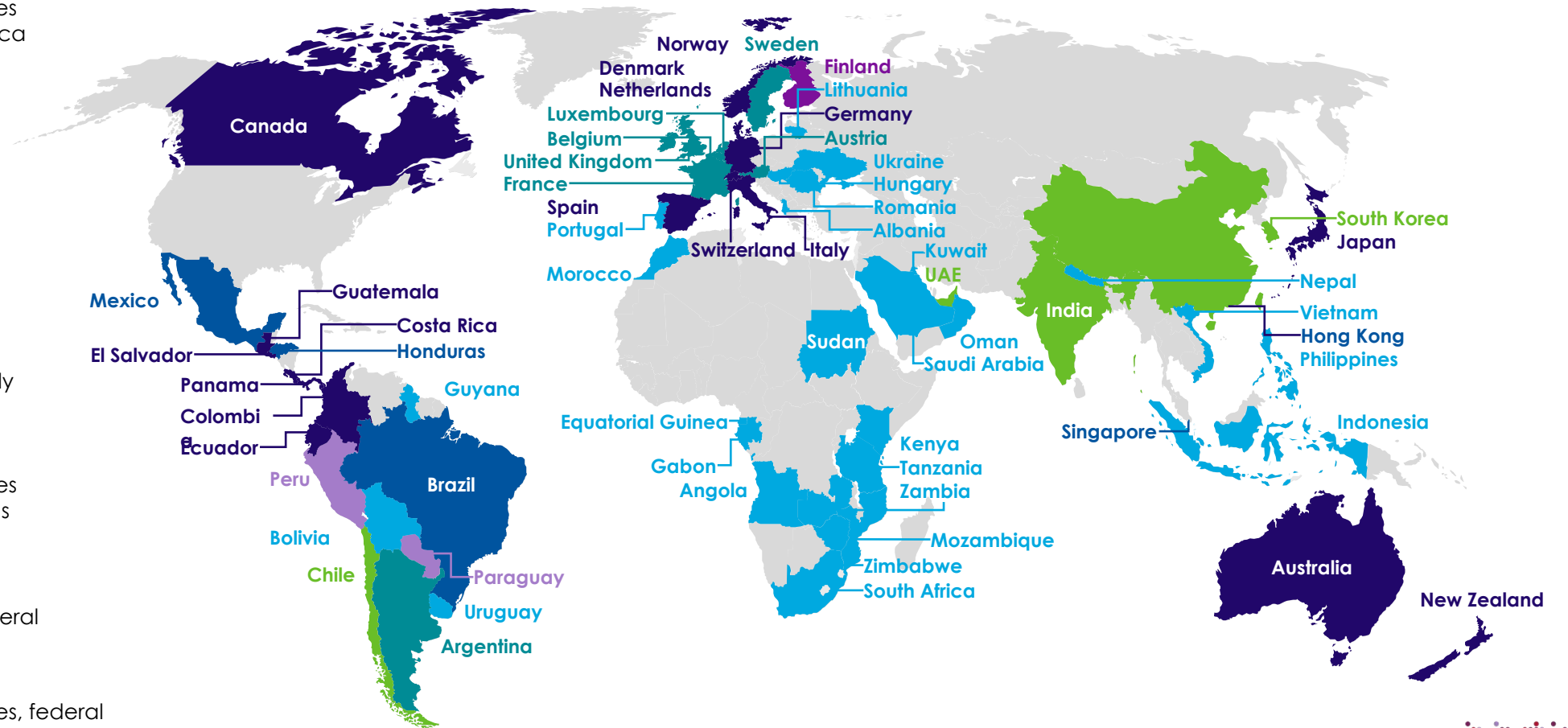
We are Brand USA,
the nation's destination
marketing organization.

Together we forecast global growth with the world

2019

Brand USA around the world

- Brand USA marketing initiatives and Visit USA/Discover America committee activities
- Brand USA marketing initiatives only
- Visit USA/Discover America committee activities only
- Federal partner programs only
- Brand USA marketing initiatives and federal partner programs
- Visit USA/Discover America committee activities and federal partner programs only
- Brand USA marketing initiatives, federal partner programs, and Visit USA/Discover America committee



International Representation Enhancements



CANADA



First international
Brand USA
employee
Colin Skerritt,
Regional Director,
Canada



SOUTH KOREA



Strategy shift
Two agencies
Travel Trade
Media Relations



Trade activities across all market

Tradeshows

Sales missions

Product fairs

MegaFairs

Product development

USA Discovery program

Travel trade website

Partner opportunities

Travel trade destinations training programs

Travel marketing co-ops

Collaboration with federal partners and visit USA

Associations in market



Travel Trade Resources



Toolkits



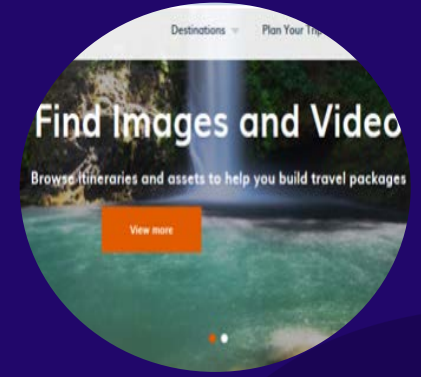
MegaFams & familiarization tours



USA Discovery program



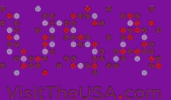
China readiness program



Travel trade website



Brand USA Travel Week, London: September 9-13, 2019



Partner programs: co-operative marketing



Brand USA originals

offered exclusively
through Brand USA



Affinity programs

Developed for Brand USA
with OTAs and publishers

U.S.-India travel and tourism engagement



India is an important market for the future

Brand USA uniquely situated to participate in public-private initiatives

Engagement between the U.S. & Indian governments on travel & tourism is an opportunity

U.S.-China tourism leadership summit



Marquee annual event to build and strengthen relationships between the U.S. and Chinese travel industries

Seattle, Washington (September 17-22, 2019)

VISIT
seattle


VisitTheUSA.com



VisitTheUSA.com

VisitTheUSA.com

Integrated Marketing
Brand USA



Integrated marketing



**Storytelling
approach**



**Device
strategy**



**Entertainment
platforms**



**Social
and digital**



**Consumer
and trade PR**

Many voices



Locals

Visitors

Category Experts

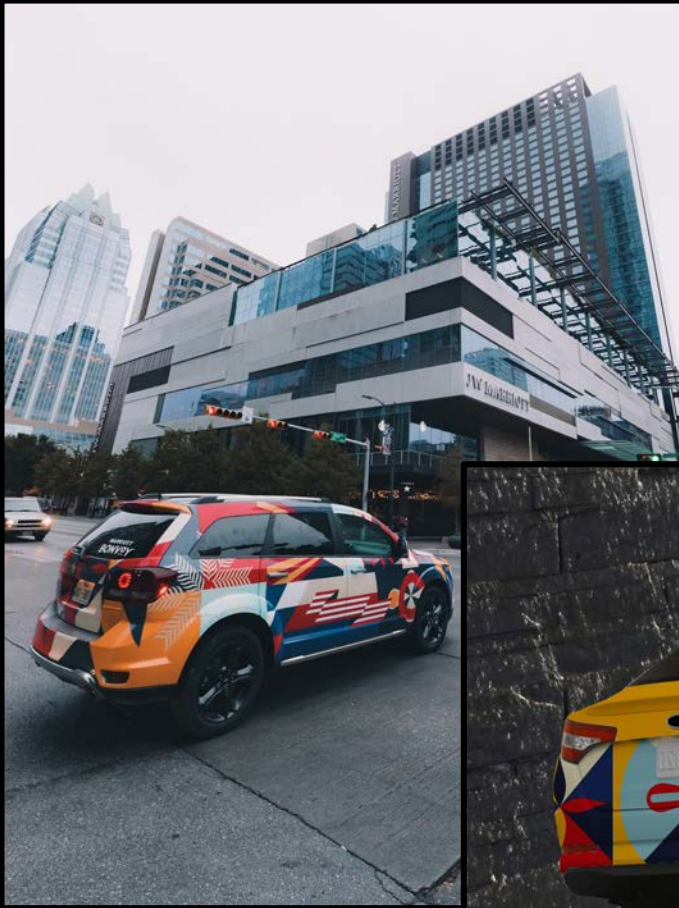
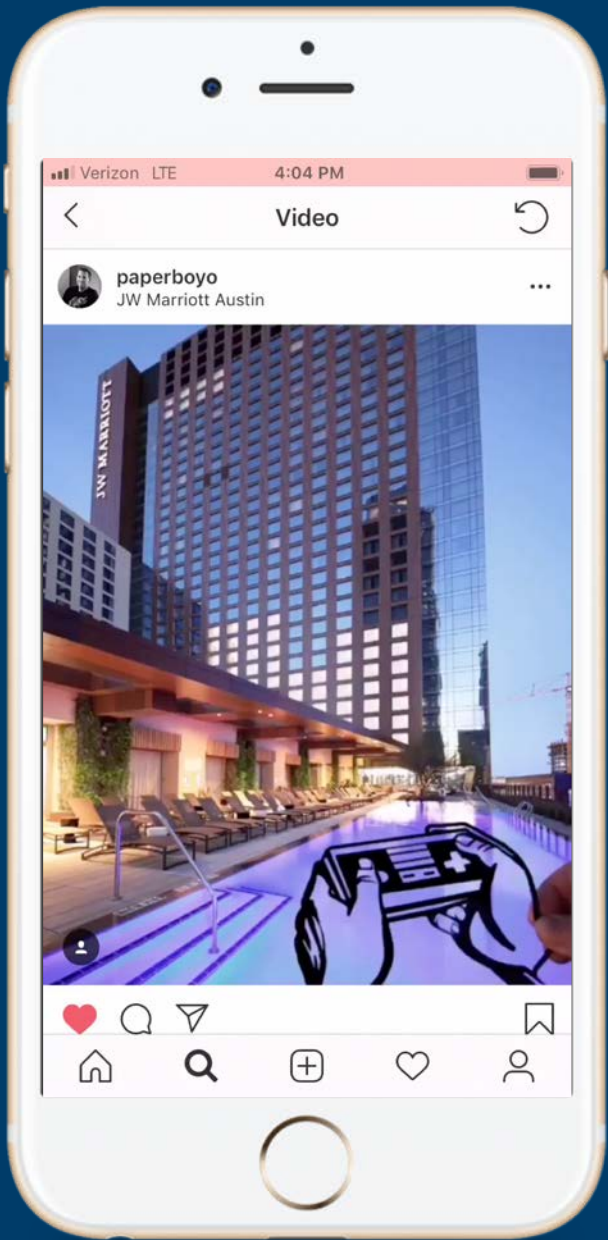
Content Creators



UNITED STORIES



Partnership with Marriott International



United Stories






Sacramento



ipw ANAHEIM
Powered by U.S. Travel
JUNE 1-5, 2019


Anaheim





#UnitedStories

Where we've been

November: **Alaska** and **Hawai'i**

December: **Vermont** and **Miami**

January: **South Dakota** and **Arizona**

February: **Nashville** and **Memphis**

March: **Puerto Rico** and **Austin** and **Marfa, Texas**

April: **Asheville, NC, Virginia,** and **Washington, DC**

May: **Louisville, Kentucky,** and **California**

230 Million*
impressions

12 Million*
minutes of video
content viewed
on social

7.9 Million*
minutes of video
contents viewed

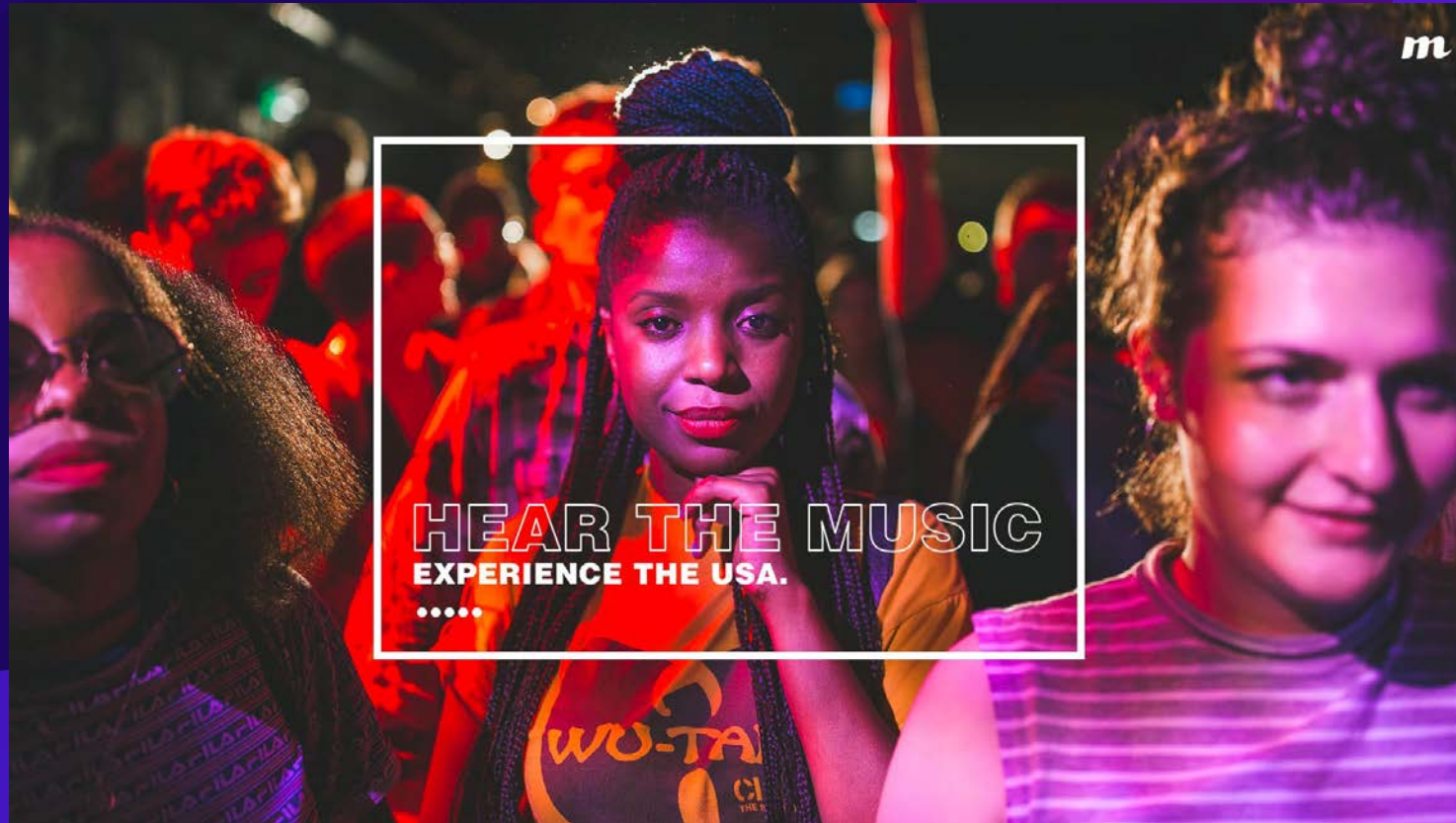


*All Numbers are Inclusive of VisitTheUSA.com, Beautiful Destinations, and 8 Influencer posts.

An aerial photograph of a winding asphalt road with yellow double lines, curving through a winter forest. The ground is covered in snow, and the trees are mostly bare, with some evergreens on the left. A small dark car is driving on the road. The text 'UNITED STORIES' is overlaid in the center in a white, stylized font.

**UNITED
STORIES**

Hear the Music, Experience the USA 2019



2 songs; 10 cities; 10 artists

**What I Like
about You**
The Romantics

**Boogie
Shoes**
KC and the
Sunshine Band





Multi-screen World Evolving

1 in 3 consumers say they no longer have cable TV or never did.

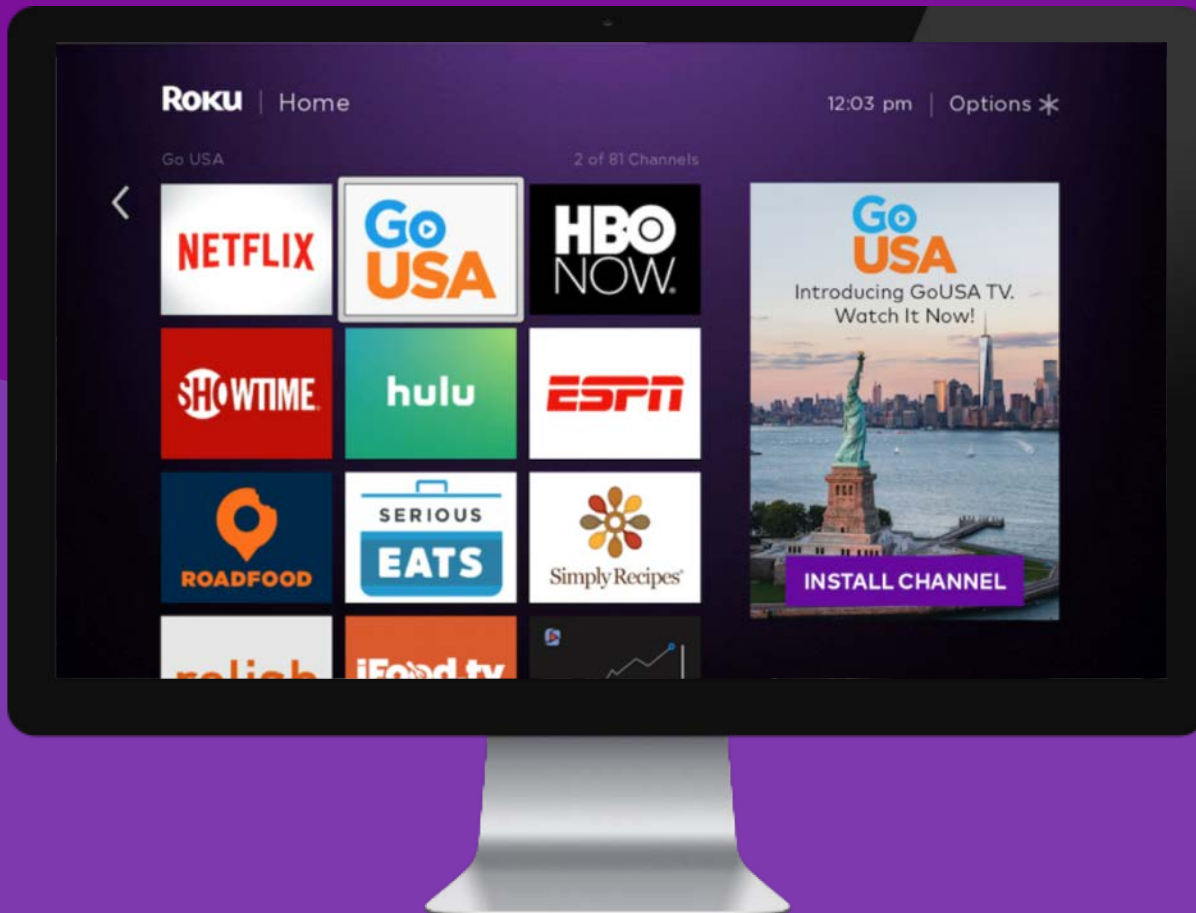
6 out of 10 people prefer video platforms to live TV.

2025 half of all viewers under the age of 32 will not subscribe to a pay TV service.

80% of TV sales are now for Internet-enabled, interactive TVs.



GoUSA TV



Inspire travel through
entertainment

Curate entertainment-
driven storytelling with a
distinct
sense of place

Be the go-to channel for
content featuring U.S.
destinations

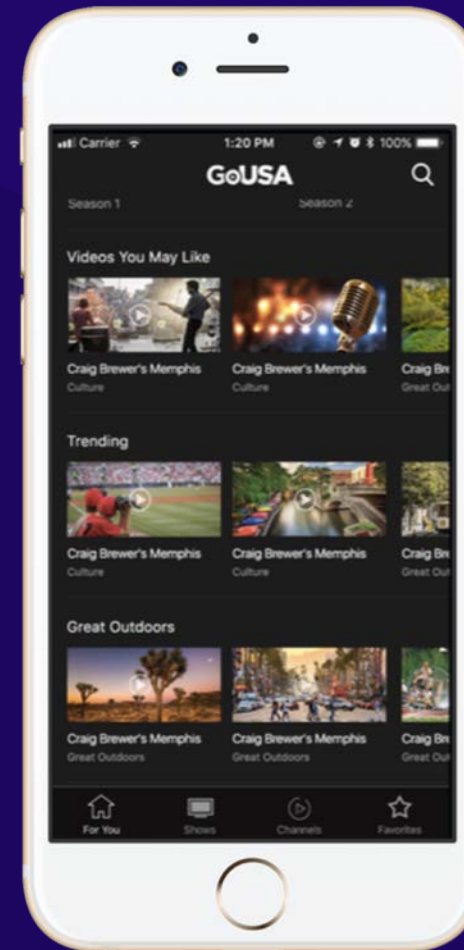
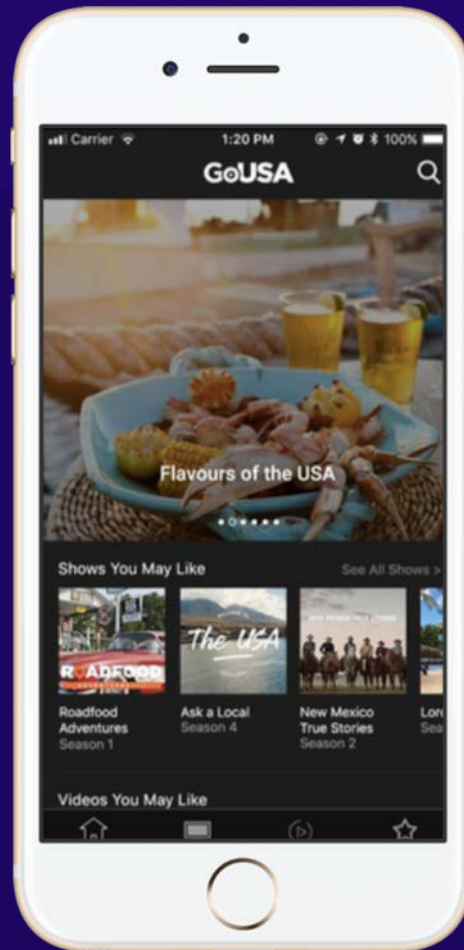


On Now & Coming Soon



GoUSA TV Mobile App Launches

Launched in
October at
NFL London
games



Together, we are inspiring the world to visit the USA

2020

Brand USA Travel Week 2020

Mark Your Calendar



September 2020

Europe

October 2020

India

3rd Giant-Screen Film

World Premiere
February 2020

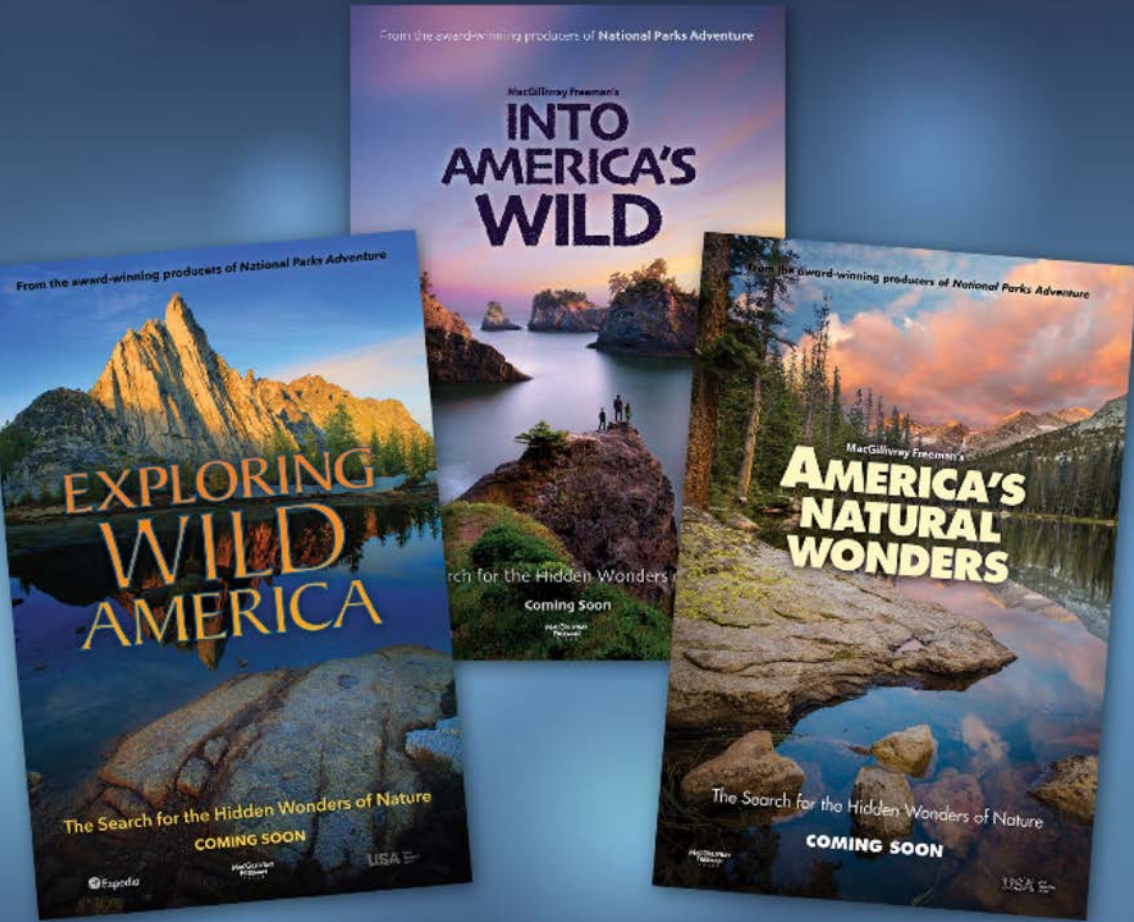
expedia group™
media solutions

In the spirit of the hit film *National Parks Adventure* comes *Into America's Wild* (working title), a new adventure into the hidden wonders of the natural world. The film follows John Herrington, the first Native American astronaut, and Alaskan pilot Ariel Tweto, who share a passion to inspire the next generation to connect with nature and seek new experiences in the great outdoors. Their cross-country journey leads them to the scenic byways, ancient homelands, little-known gems and hidden trails that form the natural tapestry of America. From kayaking Oregon's stunning coast to the ancient canyons of the Southwest, from the wilds of Alaska to the Appalachian Trail, *Into America's Wild* will connect audiences to the trailblazer in all of us and show that nature is the best classroom of all.



From the producers of *National Parks Adventure* and *America's Musical Journey*

Coming Soon...Our Next Adventure



Stop by the Brand USA booth #2442 to cast your vote and help us choose the title.

A Film for Giant Screen Theaters
AVAILABLE FEBRUARY 2020

www.intoamericaswild.com



Vote



QUESTIONS?

Thank you!

Like/follow/share



Consumer

VisitTheUSA



VisitTheUSA.com

Travel industry

TheBrandUSA.com



GoUSA