

The logo for Brand USA, featuring the letters 'USA' in a stylized, dotted font.

VisitTheUSA.com

Brand USA

July 11, 2019

CSRA/National Restaurant Association Summer Membership and Marketing Conference

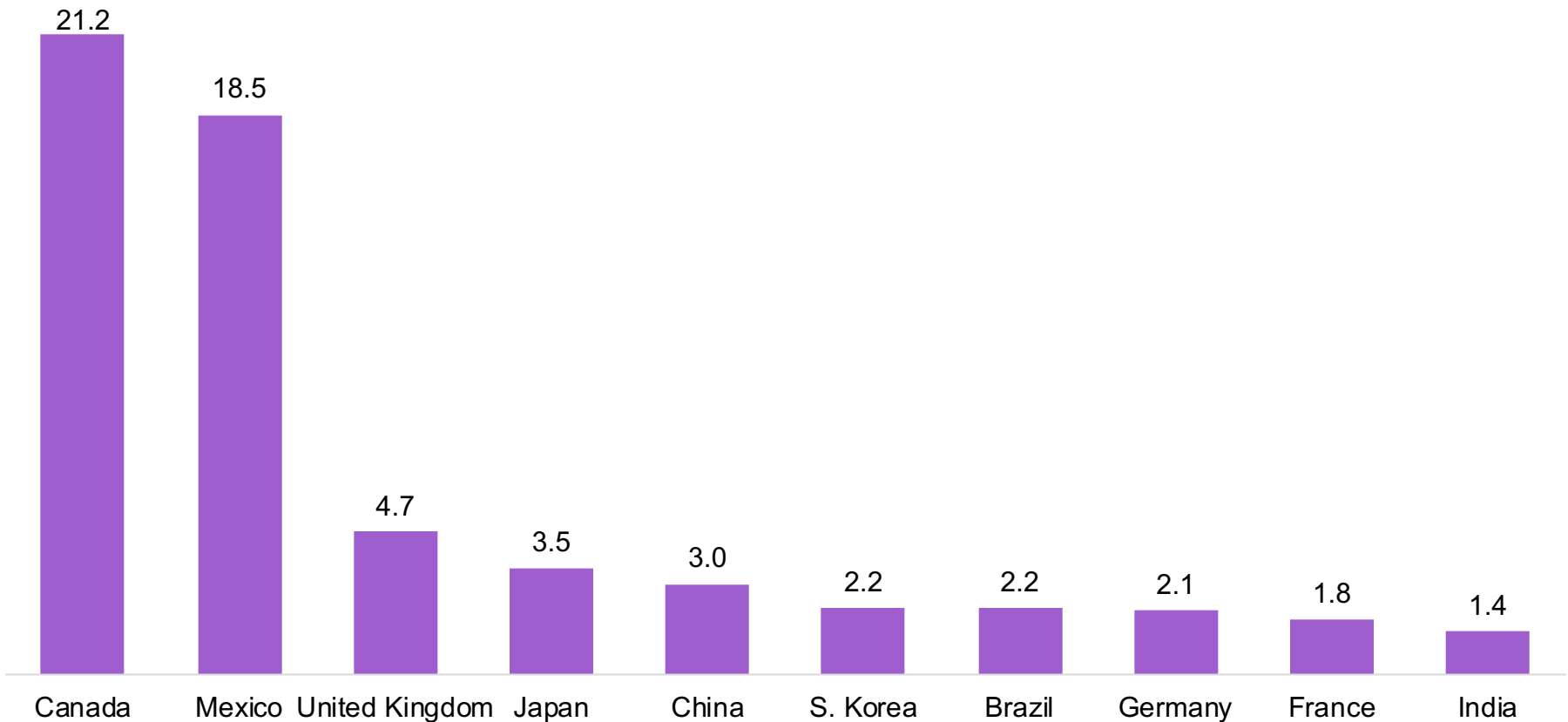
Travel Powers the Economy and Enhances the Image of the USA

- **#1 Services Export**
 - 79.6 million international visitors spent \$255.5 billion
 - \$69.3 billion trade surplus
 - 31% of U.S. service exports; 10% of all U.S. exports
- **2.8% of GDP**
 - \$1.62 trillion in economic output
 - \$141.5 billion in tax revenue
- **7.8 Million Jobs Supported by Travel**
 - 5.5 million direct; 2.3 million indirect
 - Top 10 employer in 49 states and DC
 - 1.2 million jobs supported by international travelers
- **International Visitation Enhances the Image of the USA***
 - 74% more likely to have a favorable view of the USA after they visit
 - 61% more likely to support U.S. policies after they visit
- **Market Share**
 - The USA welcomes 5.8% share of the world's travelers and leads the world in global tourism receipts, commanding 15.7% of world traveler spending



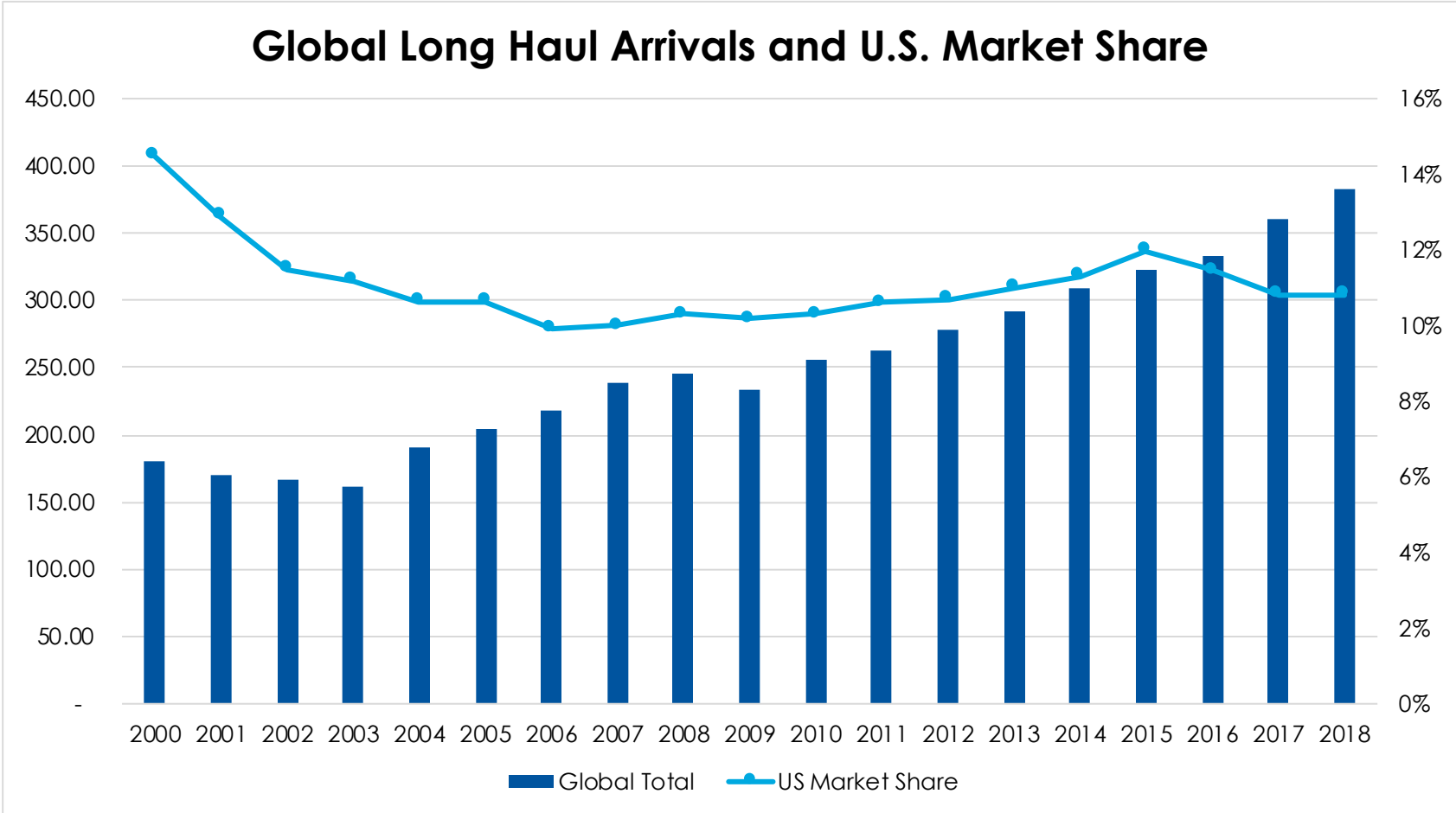
*Source: Pew Research Center

2018 Top 10 US Inbound Markets (visitation in millions)



Sources: U.S. Department of Commerce, ITA, I&A, National Travel and Tourism Office (NTTO) I-94 Program, Statistics Canada, and Instituto Nacional de Estadística y Geografía/INEGI in Mexico, May 2018

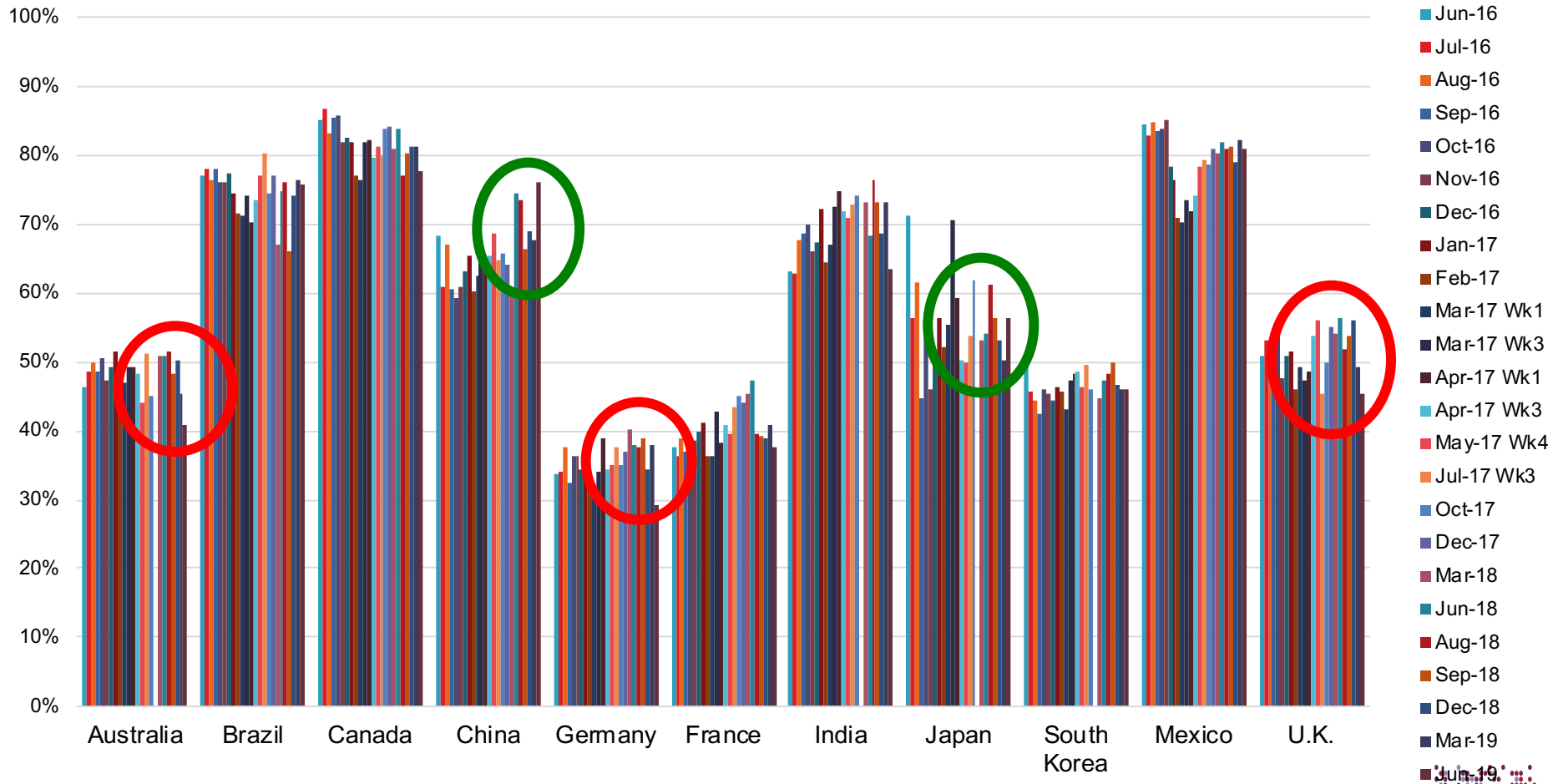
USA Market Share (long-haul)



Key Factors Driving Inbound Visitation



Likely to Visit the USA in the Next Two Years



Source: ORC, custom study



Brand USA



The USA's unique value proposition



Diversity

The diversity of the USA's destinations and people is exciting and unique.

Experiences

The USA offers nearly limitless authentic travel experiences.

Proximity

The proximity of the USA's diverse and authentic travel experiences (to, through, and beyond the gateways) provides travelers more value in a single visit than any other destination in the world.

Top Rated USA Destination Characteristics

1.



Leisure
(Dining, Shopping, Nightlife)

2.



Natural Features
(Features/Landscapes)

3.



**Landmarks and
sightseeing**
(Historical sites, museums,
etc.)

4.



Reputation/Popularity

5.



**Ease of Travel to the
destination**

6.



Activity Options

7.



Local Culture
(Food, music, etc.)

8.



Quality of Beaches

How We Market the USA

Brand USA's core strategies to increase international visitation, spend, and market share for the United States include our consumer-focused USA Campaigns, trade outreach, and cooperative marketing programs that, in total, promote the United States in its entirety while adding and creating value for our partners.



**Global Consumer
Campaigns**



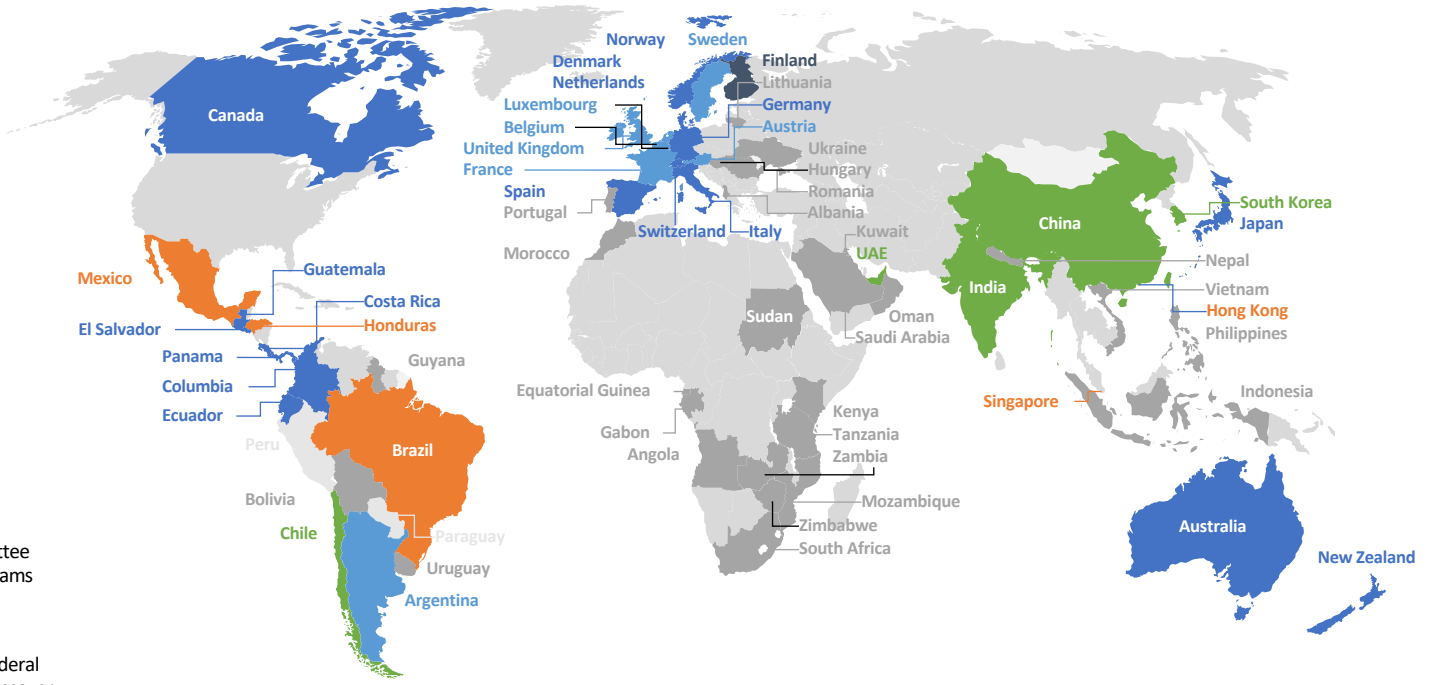
**Travel Trade
Outreach**



**Cooperative
Marketing Programs**

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 initiative 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



Return on Investment

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



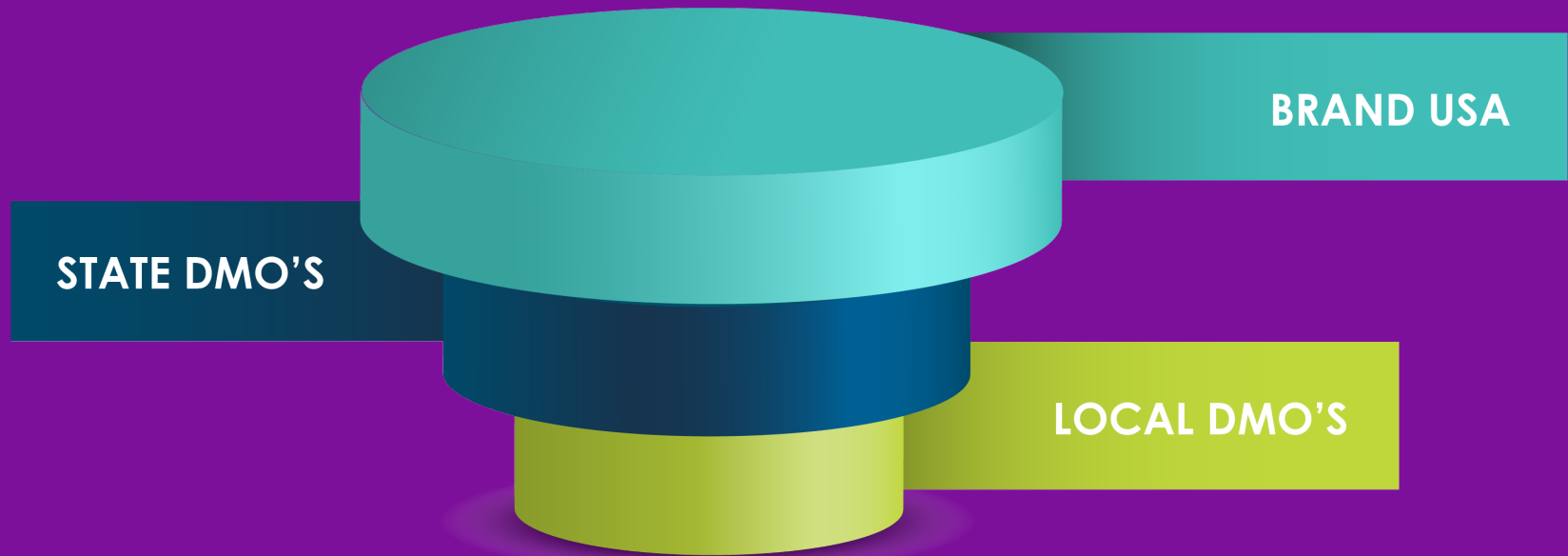
\$47.7 billion
total economic
impact



ROI Data Source: Oxford Economics



Brand USA's Role



Integrated marketing

We weave **engaging narratives** and **create powerful, authentic storytelling** across owned, paid, and earned media in order to entertain, engage, and inspire travelers to visit the USA.



Storytelling
approach



Device
strategy



Entertainment
platforms



Social
and digital



Consumer
and trade PR

Storytelling through many voices

Give a voice to real travel experiences within the USA

Create urgency and provoke “travel dreaming” by highlighting first person storytelling & perspectives

Lend authenticity to our communications, as well as creating a sense that there are many United States

Incorporate and build on our foundational **value proposition** (proximity), **competitive edge** (possibility) and **tone** (welcome)

Our content strategy will focus on curating individual voices that each express a particular point of view and place of interest.



Who are the Many Voices?

Locals

A place is defined by those who live there, who have explored its culture, roads and trails like no other and can welcome and inspire.

Category experts

Travelers look to category experts like journalists, hoteliers, cabbies and others to inspire their travel decisions. We will use them to guide our community.

Visitors

To travel is to know and the past visitor now becomes the storyteller and the evangelist for travel to the USA.

Creative class

We will amplify creative voices to show America as it hasn't been seen before via musicians, writers, photographers, artists and poets.



Screen strategy and storytelling platforms

Mobile



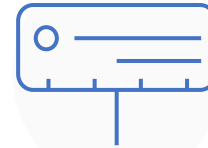
**Laptop/
desktop**



**Smart
TV**



**Digital
OOH**

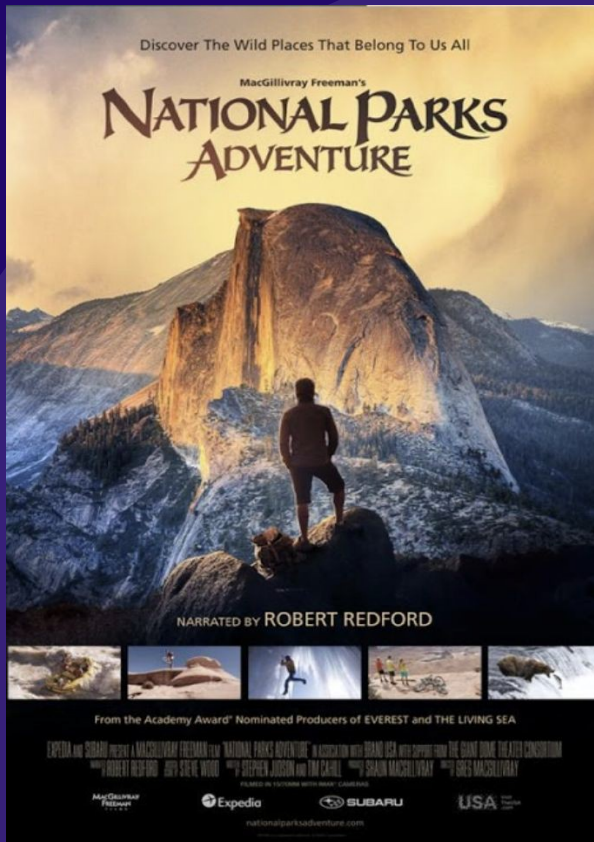


**Giant
screen**



“From mobile to giant screen and everything in between”

Giant screen films



3rd Giant-Screen Film

World Premiere
February 2020

expedia group™
media solutions

In the spirit of our hit film
*National Parks
Adventure* comes

Into America's Wild
(working title)

A cross-country journey to
scenic byways, ancient
homelands, little-known gems
and hidden trails that form the





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.

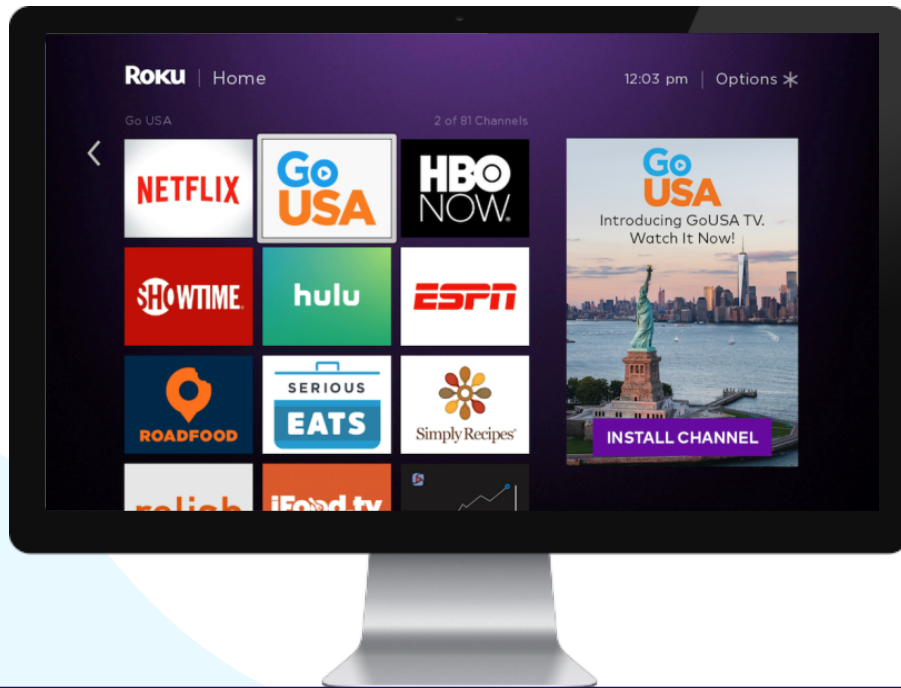
By 2025, half of all viewers under the age of 32 will not subscribe to a pay TV service.

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

Source: [Think With Google "Video Trends"](#)



GoUSA TV



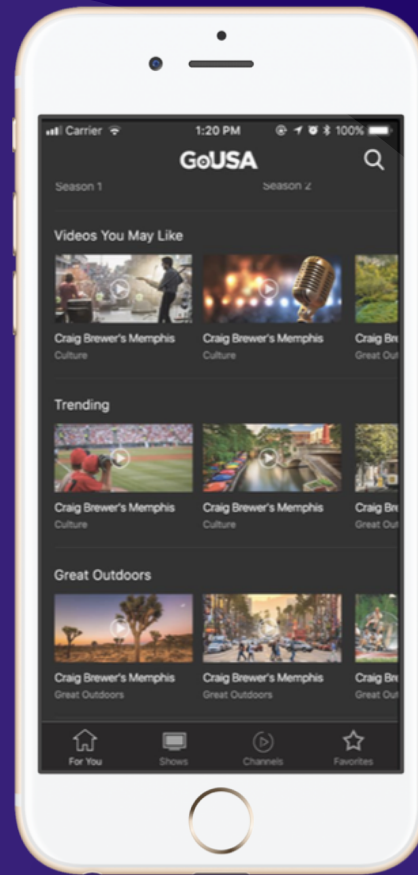
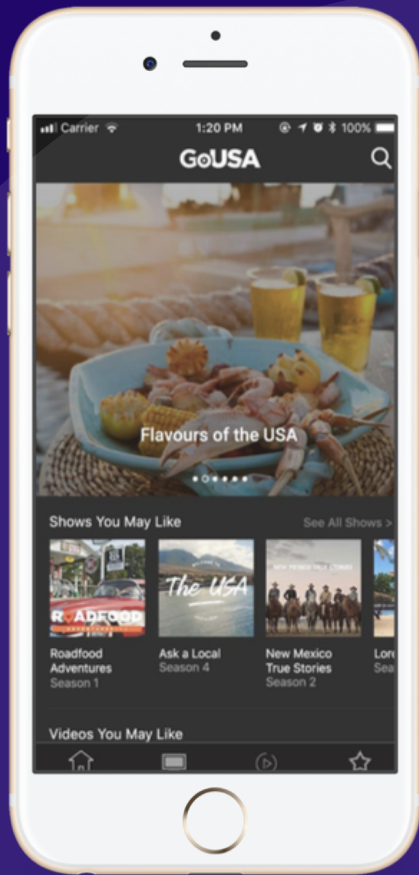
Inspire travel through
entertainment

Curate entertainment-driven
storytelling with a distinct
sense of place

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



GoUSA TV mobile app



On Now & Coming Soon



Brand USA Core Storytelling Campaigns

Ask A Local



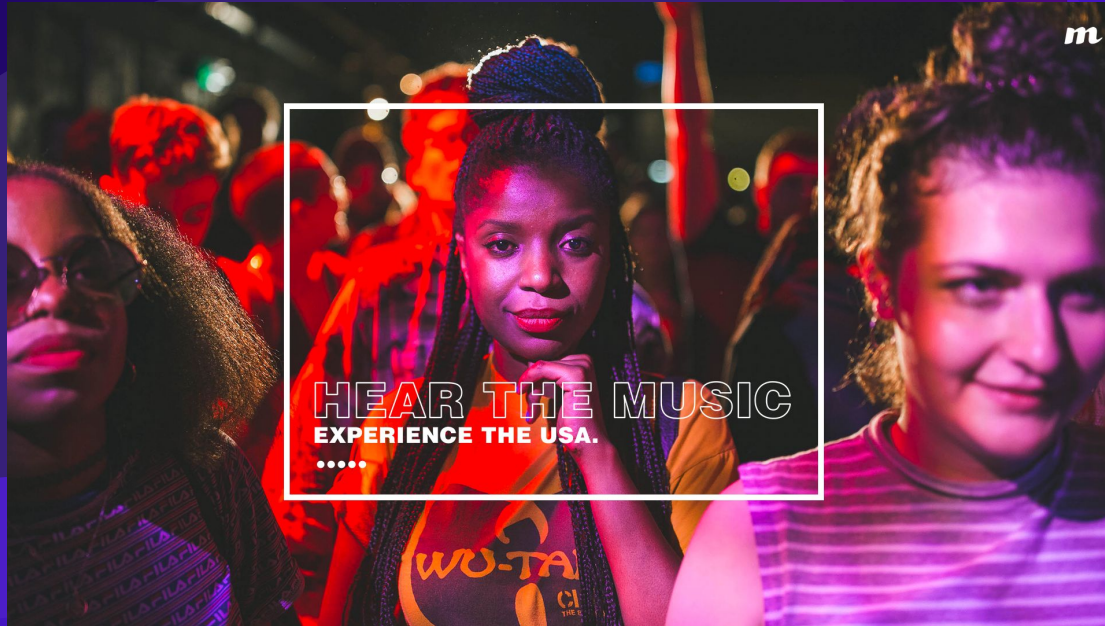
Hear The Music



United Stories



Hear The Music, Experience the USA



2 songs; 10 cities; 10 artists

What I like
about You
The Romantics

Boogie Shoes
KC and the
Sunshine Band

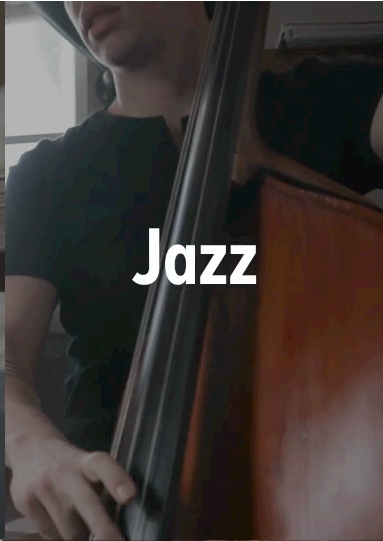




Motown



**Hillcountry
Blues**



Jazz



Rock



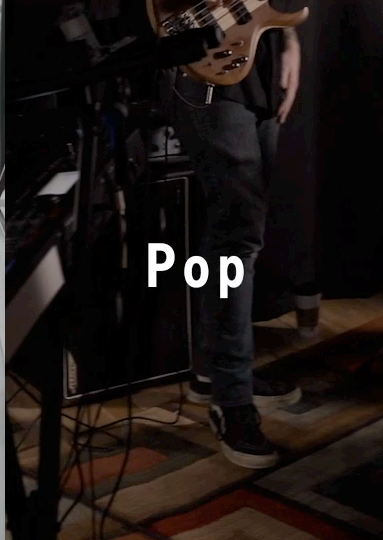
**Vintage
Rock**



**Latin
Fusion**



**Piano
Funk**



Pop



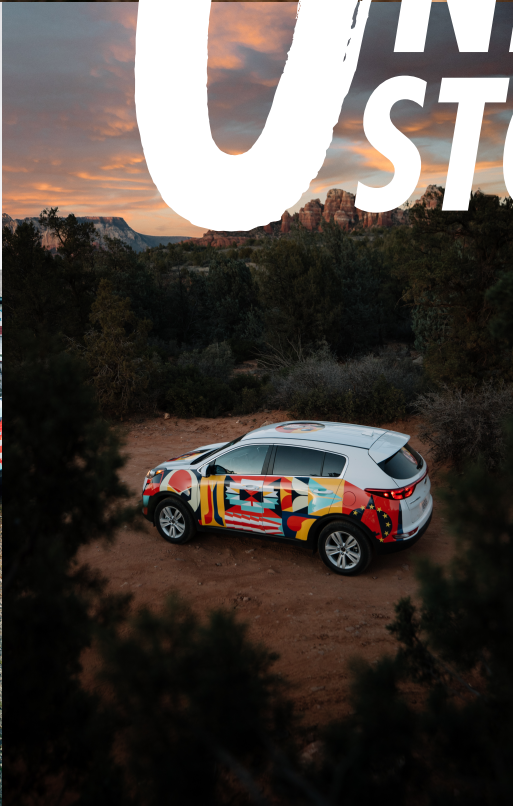
Blues



Bluegrass



UNITED STORIES







Thank you!

Like/follow/share



Consumer

VisitTheUSA



VisitTheUSA.com

Travel industry

TheBrandUSA.com



GoUSA