



Data-Driven Decisions

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President & CEO

Mission

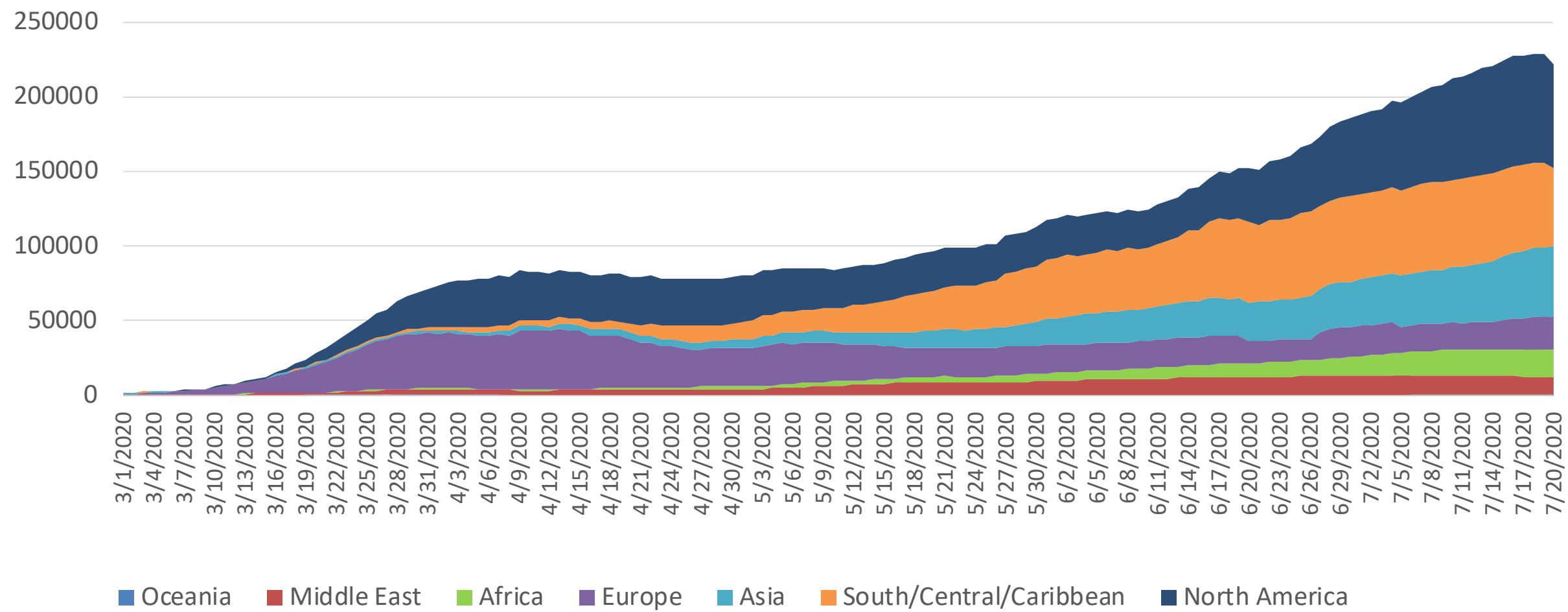
Increase incremental
international visitation, spend &
market share to fuel our nation's
economy and enhance the image
of the USA worldwide

What Our Research Shows Us



New Confirmed Cases by Region

(rolling average over 7 days)



Current Pace Relative to Initial Peak

Accelerating

- Australia
- Brazil
- India
- Japan
- Mexico

Flattened

- Canada
- France
- Germany
- UK

Decelerated

- China
- South Korea

Economic Picture

International Visitation Percent Change From 2019

2020	-63%
2021	-40%
2022	-20%
2023	-7%

International Spend Percent Change From 2019

2020	-75%
2021	-56%
2022	-34%
2023	-17%

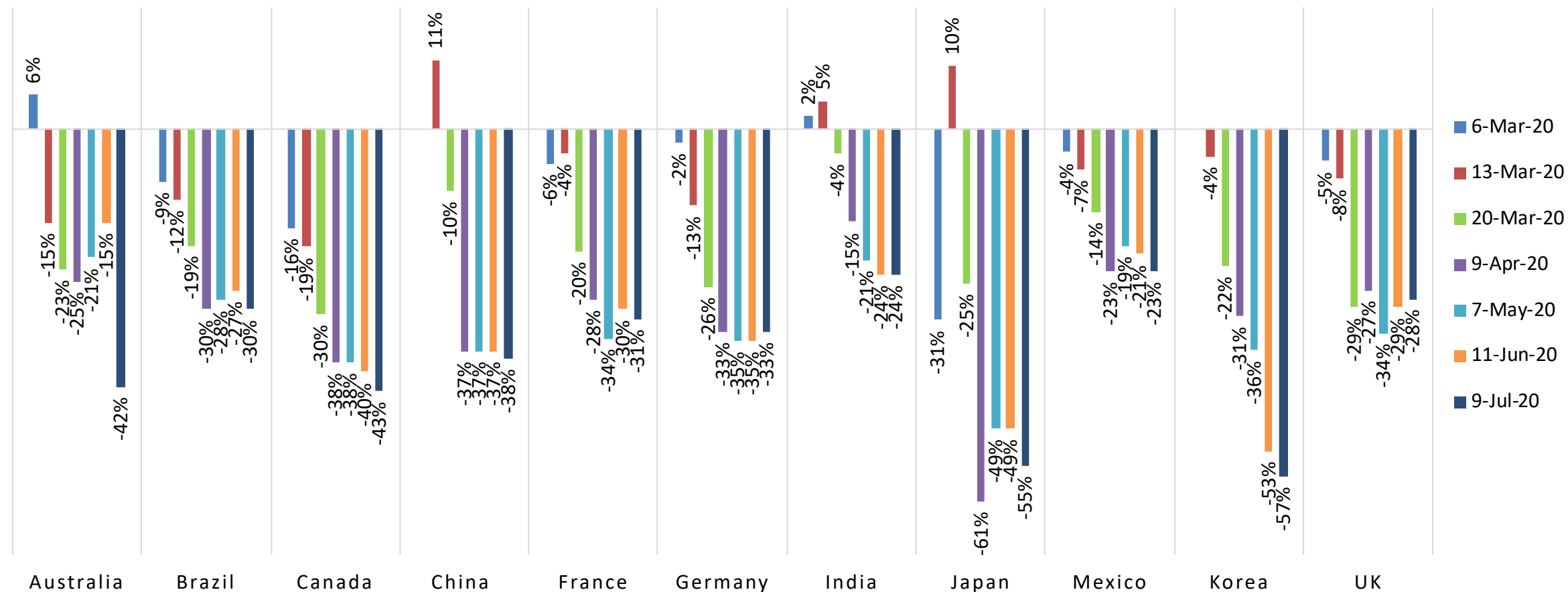
International Spend Total Losses Compared to 2019

-\$354 Billion



Likelihood to Travel Internationally in Next 12 Months

(% Change over 2019 average)



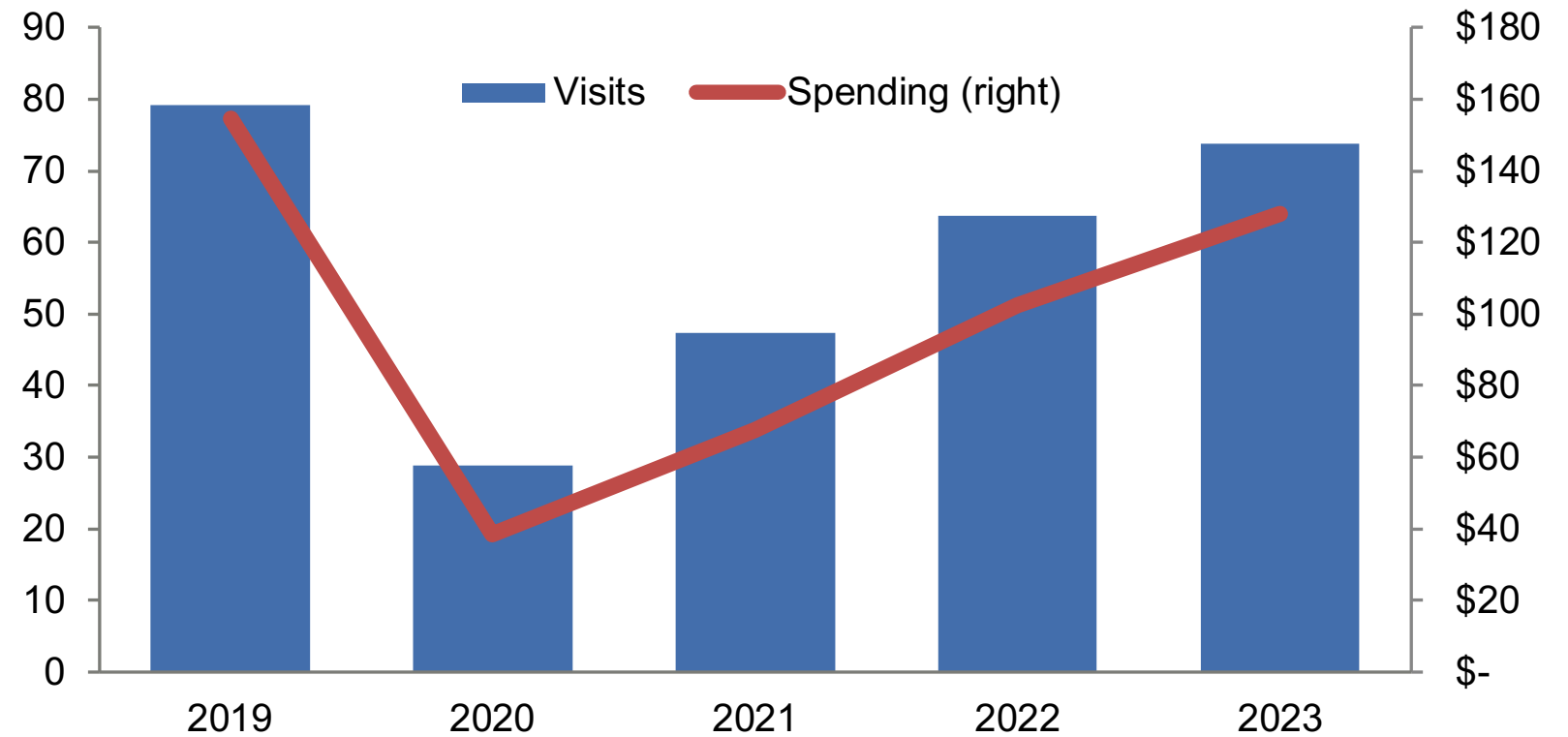
Base: All respondents
Source: Engine/ORC Custom Study

Recovery Timeline of International Markets

5 Year Outlook

- Visits to U.S.
drop by 50 million
- Spend forecast to
fall 75%

US international visits and spending
million visits (left), \$ billions (right)



Source: Oxford Economics



Where We Are Going

Brand USA's Business Planning Framework



**State of
readiness**



**Gating
criteria**



Recovery

State of
readiness



Maintaining a State of Readiness

1

Priority: Spend efficiently to affect relevant factors to travel during state of readiness and prepare for a robust recovery effort.
Objective: Prepare for a robust recovery with as many resources as possible.
Measure: Resources allocated to recovery campaign.

2

Priority: Maintain a state of readiness.
Objective: Recovery campaign ready to go, including partner opportunities.
Measures: Ready launch plan and assets by beginning of FY2021.

3

Priority: Maintain engagement with travel distribution networks.
Objective: Maintain travel trade presence in key source markets to keep the USA top of mind via training, webinars, and B2B engagements (e.g. new virtual global marketplace).
Measures: Number of travel trade engagements and number of partners engaged.

4

Priority: Keep the drumbeat of inspiration alive.
Objective: Deploy inspirational consumer messaging through organic digital and social channels, GoUSA TV, and earned media.
Measures: Engagement (comments, likes, share), video views, and impressions.



Brand USA

Maintaining a State of Readiness

5

Priority: Help the industry maintain a state of readiness.

Objective: Provide Brand USA partners and the U.S. travel and tourism industry with market intelligence and a global infrastructure to maintain a presence in the international marketplace.

Measures: Participation in research webinars and small roundtable groups; participation in Brand USA travel trade programs; partners returning to market when conditions are right.

6

Priority: Maintain a pulse on market and industry conditions.

Objective: Track market and industry conditions to monitor gating criteria, provide value to the industry, and inform marketing messaging.

Measures: Consumer sentiment; consumer behavioral indicators; market, travel trade, and media reports from international offices.

7

Priority: Communicate entry policy and opening status.

Objective: Maintain and disseminate a central repository of up-to-date entry policy and procedure information as well as critical state-, city-, and company-level opening information and health protocols.

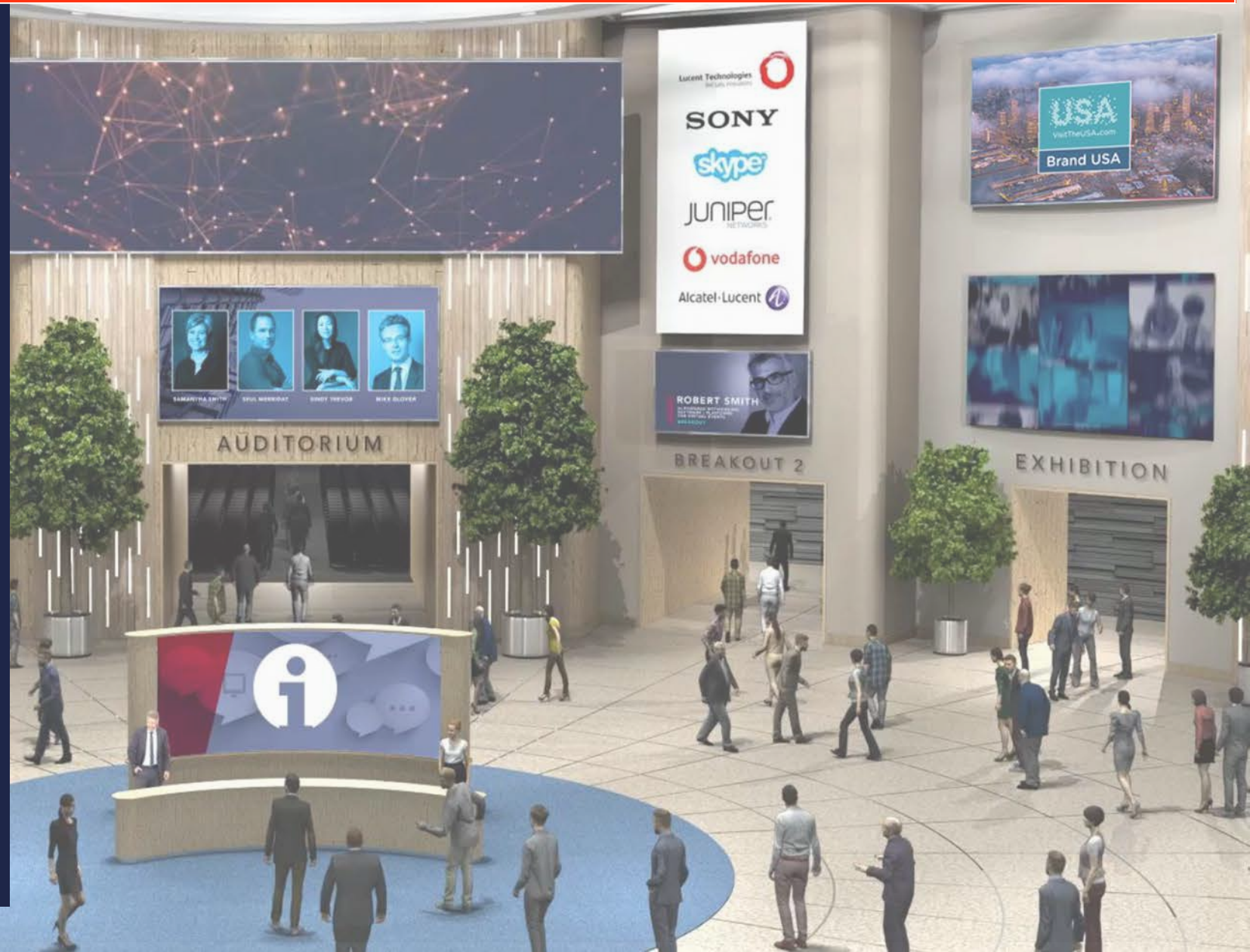
Measures: Information is regularly maintained and included in proactive trade engagement and external communication to stakeholders.

Working Two Challenges

- Our partners have left the international marketing space to focus on local recovery. We will develop a re-entry vehicle for our return which is:
 - Dynamic - scalable and global
 - Disruptive - an innovative solution which will replace inefficient, inertia driven methods
 - Efficient – lowering barriers to participate and requiring minimal resources
- Create a virtual version of Travel Week for 2020 and beyond
 - Even when we return to face-to-face meetings, virtual will remain a part of that experience

Brand USA Global Marketplace

- ✓ 24/7 -- 365 days
- ✓ Evergreen and refreshed
- ✓ Virtual rooms
- ✓ Partner Pavilions for
 - Exhibitors & Buyers
 - Programming/Enrichment
 - On-demand
 - Entertainment & Enrichment
- ✓ Launching late September



Gating criteria



Gating Criteria

Category	Criteria	Indicator
Source market conditions	Air service	Planned increases in seat capacity from source market
	Consumer sentiment	Increase in intent to visit the USA
	U.S. entry policy toward market and source-market policy toward travel to the USA	Entry to the USA is allowed No onerous requirements in home country (such as 14-day quarantine)
	Consumer behavioral indicators	Substantive increases in search and product queries for travel to the USA
Home market conditions	COVID-19 levels	Sustained decline/maintained low volume of cases
	Destinations are open and eager to accept visitors	A majority (~80%) of gateway destinations allow recreational attractions, retail stores and restaurants to operate at full capacity
Partner/fiscal conditions	Partner demand for international marketing	Partner surveys and roundtable group feedback
	Partner contributions	Partner dollars allocated for international and LOAs to Brand USA

Recovery



USA
VisitTheUSA.com

Brand USA

Recovery

1

Priority: Drive international arrivals, spending, and revenue for travel suppliers, as well as state and local DMOs in the United States.

Objective: Generate measurable bookings through an inspirational campaign that integrates selected tour operators, airlines, and OTAs through calls-to-action and use of Brand USA itinerary programs and other tools.

Measures: Attributable bookings; participation and engagement by tour operators, OTAs, airlines.

2

Priority: Deploy an effective and efficient campaign.

Objective: Make the USA the easy and obvious choice as a travel destination.

Measures: Engagements, video views, CPM; campaign-led bookings.

3

Priority: Represent the entirety of the United States, including rural and urban areas.

Objective: Include as many states, cities, regions, and territories as possible in the creative for the recovery campaign, ensuring a balance of rural and urban destinations.

Measures: Number of city and states included, and rural/urban ratio of included destinations.

4

Priority: Use recovery platform for cooperative marketing.

Objective: Implement cooperative marketing opportunities in conjunction with the campaign with focus on activation.

Measures: Number of partners participating; percentage of returning partners YOY; attributable bookings.

Over the past few weeks, we've been immersing ourselves in the plethora of secondary research available to the industry in the form of reports, data, webinars, seminars, predictions, and forecasts.

The learnings and insights we've gathered served as **key inputs** to our brand and communications strategy in the following sections.

Here's what we've found so far.



global**webindex**

YouGov[®]
What the world thinks



Skift

McKinsey
& Company



Phocuswright[®]



ARRIVALIST

CANVAS8

CASSANDRA

Forbes



1. Re-evaluating “Normal”

It’s important that we are optimistic in tone and play into our aspirational DNA that the U.S. is more than just a destination, it’s an idea that we can tap into to emotionally to connect with consumers.

2. Optimism for Future Travel

Travel willingness will recover, and when it does, it’s crucial that we’re in market with an ownable rallying cry that resonates just as well with partners as consumers.

3. Safety Will Be Non-Negotiable

Clearly communicate the U.S. is safe for international travelers and we are ready to welcome them with the appropriate protocols and procedures.

4. Freedom to Fully Experience

Make sure information about our destinations and the many experiences available to tourists comes through in our messaging.

5. The Great Outdoors

Lean into the abundance of open roads, vast lands, sprawling national parks, and off-the-beaten path destinations that are uniquely ownable to the U.S.

6. The Road Trip

The U.S. is home to the road trip, a uniquely American strength that we should prioritize via our recovery campaign.



Laddering up to a unified goal

Driving intent to Visit the USA and increasing engagement with/within Brand USA all working toward a single goal:

Leading the recovery of the U.S. travel and tourism Industry.

The strategy you'll see today will show how we'll accomplish this goal.

Lead the international recovery of the U.S. travel and tourism industry

Increase engagement with USA content

Drive intent & bookings to visit the USA



Brand Strategy

HUMAN INSIGHT

Our lives have been interrupted and put on hold,
giving us unprecedented time to reflect and re-
prioritize our values.

BRAND TRUTH

The U.S. is an aspirational destination that
truly reflects the spirit of reinvention.

Recovery Strategy

Reset & Go



Comms Tasks

Our Communications Tasks

Comms Tasks	1. Welcome the World Back	2. Bring to Life Post-COVID Possibilities	3. Prove We're Ready	4. Entice and Convert	5. Open our Toolbox
Comms Tactic	High impact creative execution that provides a clear sign that the USA is once again welcoming tourists to visit.	Communications tactics which bring to life the incredible possibilities of a U.S. trip even in a post-COVID reality. There are countless socially-distant experiences that our audience may not consider on their own.	Strategies which highlight the efforts being taken by our airports, DMOs, tourism operators, etc. to ensure safety for travelers who come back to visit us as this will be non-negotiable.	Deploy marketing strategies which ensure that the USA maintains its fair share of International travelers through lower-funnel tactics aimed at driving bookings.	Ensure the Reset and Go Platform provides our partners new tools they can use to be a part of the reentry effort and drive bottom line results.
Potential Channels Tactics	TV OLV PR	Social & Digital Influencer Program Articles/Itineraries	Influencer Program Website (Owned) Social Search	Social Digital Tour Operator/Airline/OTA Partnerships	Toolkits Influencers UGC

Our Engagement Framework

Business Goal	Lead the International Recovery of the U.S. Travel and Tourism Industry				
Marketing Objectives	Drive Intent to Visit the USA Drive Bookings			Increase Engagement with Brand USA	
Strategy	Reset and Go				
Comms Tasks	Welcome the World Back	Bring to Life Post-COVID Possibilities	Prove We're Ready	Entice and Convert	Open our Toolbox
Potential Channels / Tactics	TV OLV PR	Targeted Social & Digital Influencers Articles Itineraries	Website (Owned) Social Search	Social Digital	Toolkits Influencers UGC



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Thank you



Consumer

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Travel industry

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GoUSA