



Brand USA

PUBLIC SESSION

Brand USA Board of Directors Annual Meeting

November 18, 2024

Brand USA

Chair Opening





BRAND USA BOARD OF DIRECTORS



Todd Davidson

Brand USA Board Chair



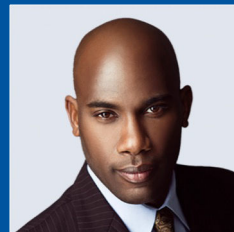
Donald Moore

Brand USA Board Vice Chair



Elliott Ferguson

Brand USA Board Treasurer



Allen Orr

Brand USA Board Secretary



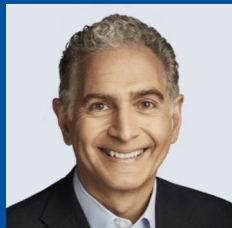
Lauren Bailey

Brand USA Board Member



Kristen Esposito

Brand USA Board Member



Mark Hoplamazian

Brand USA Board Member



Mike Mangeot

Brand USA Board Member



Tim Mapes

Brand USA Board Member



Hari Nair

Brand USA Board Member



Stephanie Young

Brand USA Board Member

CHAIR OPENING

➔ **Call Meeting to Order**

➔ **Call for Vote**

Brand USA

CEO Remarks



CEO REPORT

Reflections

- ➔ **New Leadership**
- ➔ **Priority Areas**
- ➔ **Recent Success**



BRAND USA LEADERSHIP TEAM



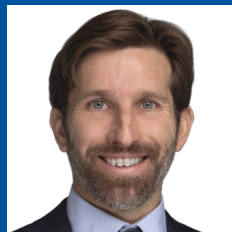
Fred Dixon

President & CEO



Angie Briggs

Senior Vice President,
Industry Partnerships
and Engagement &
Chief Development Officer



Jake Conte

Senior Vice President,
General Counsel



Chris Heywood

Senior Vice President,
Public Relations & Chief
Communications Officer



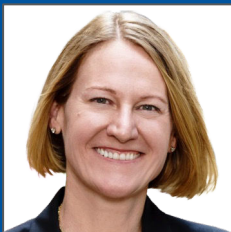
Monica Lopez

Chief of Staff & Culture



Don Richardson

Chief Financial, Diversity &
Inclusion Officer



Janette Roush

Senior Vice President,
Innovation & Chief AI Officer



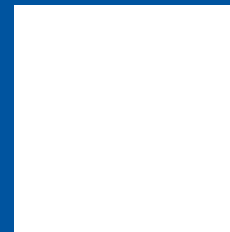
Malcolm Smith

Senior Vice President,
Global Markets & Chief Trade
and Product Development
Officer



**Aaron Wodin-
Schwartz**

Chief Corporate Affairs Officer



**Chief Marketing
Officer**

PRIORITY AREAS

01

Global Communications

02

Innovation & AI

03

Partner Engagement

04

Trade & Product Development

05

Meetings & Incentive Travel

06

Global Events

Brand USA



U.S. Inbound Travel Landscape



OUTLINE

1. **2024 YTD Visitation and Spending:** Double-digit growth
2. **2024 Air Capacity and Accessibility:** Above pre-pandemic
3. **Visitation Forecast:** Strong growth, moderate pace

Total International Travel to the U.S. 2024 YTD (Jan-Aug)

10%

YTD YoY %
Change

48M

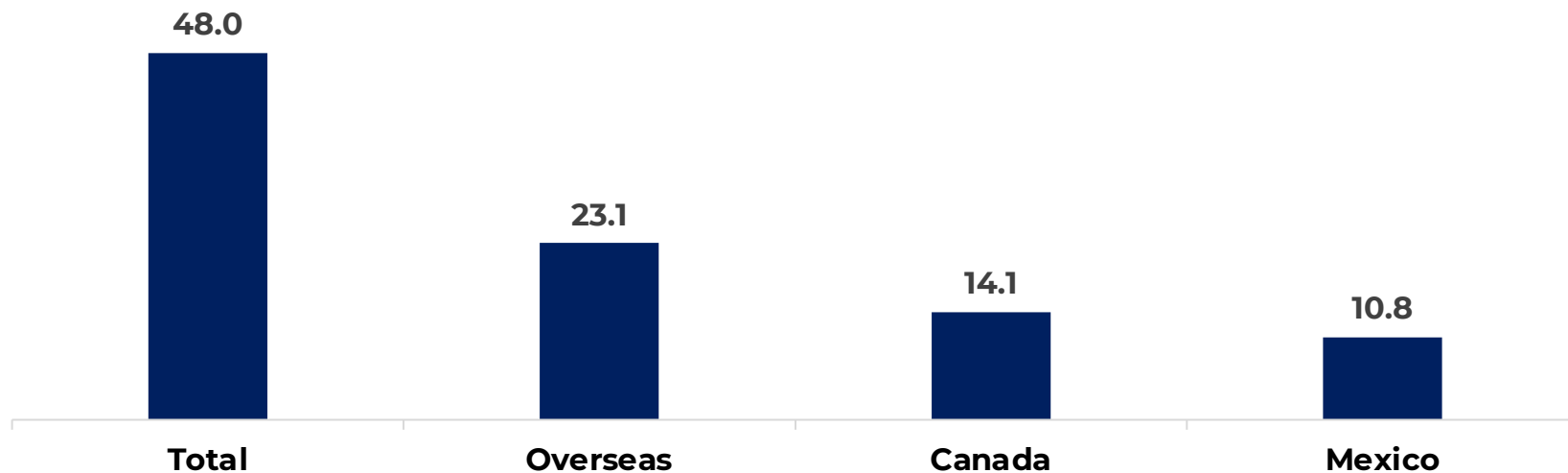
YTD (Jan – Aug)

90%

of 2019 levels

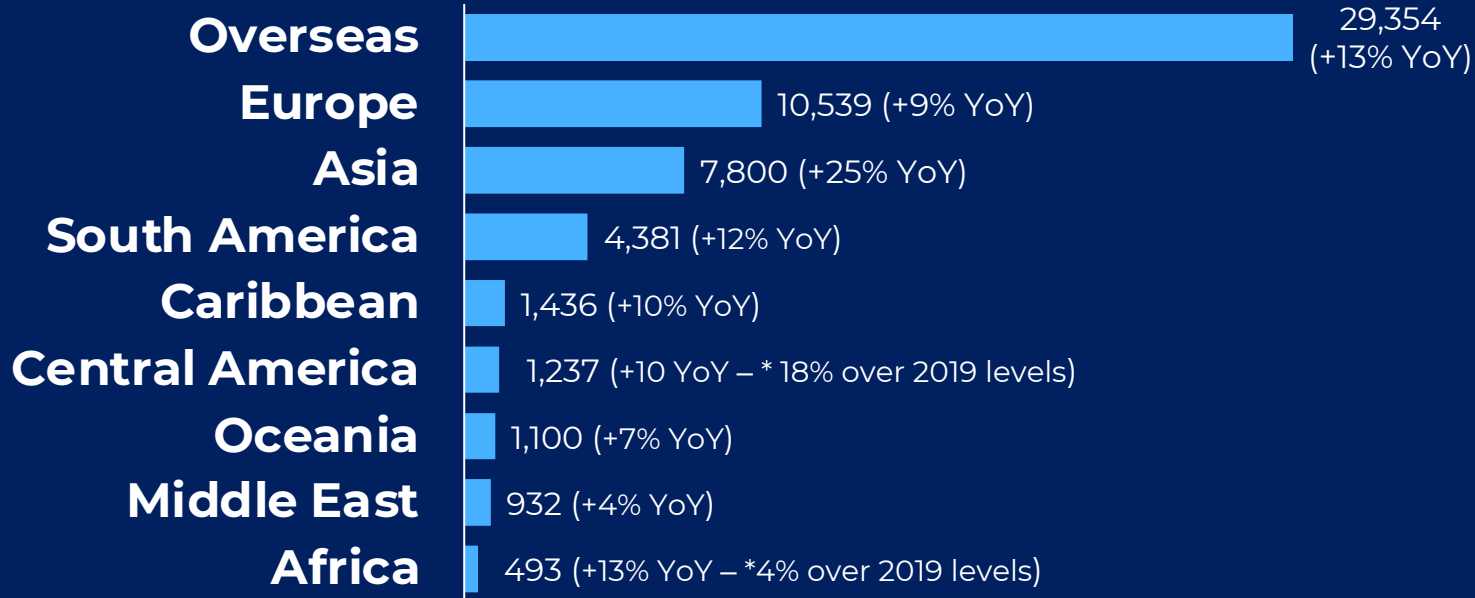
2024 YTD (JAN-AUG): TOTAL INTERNATIONAL TRAVEL TO THE U.S.

(Visitation in millions)



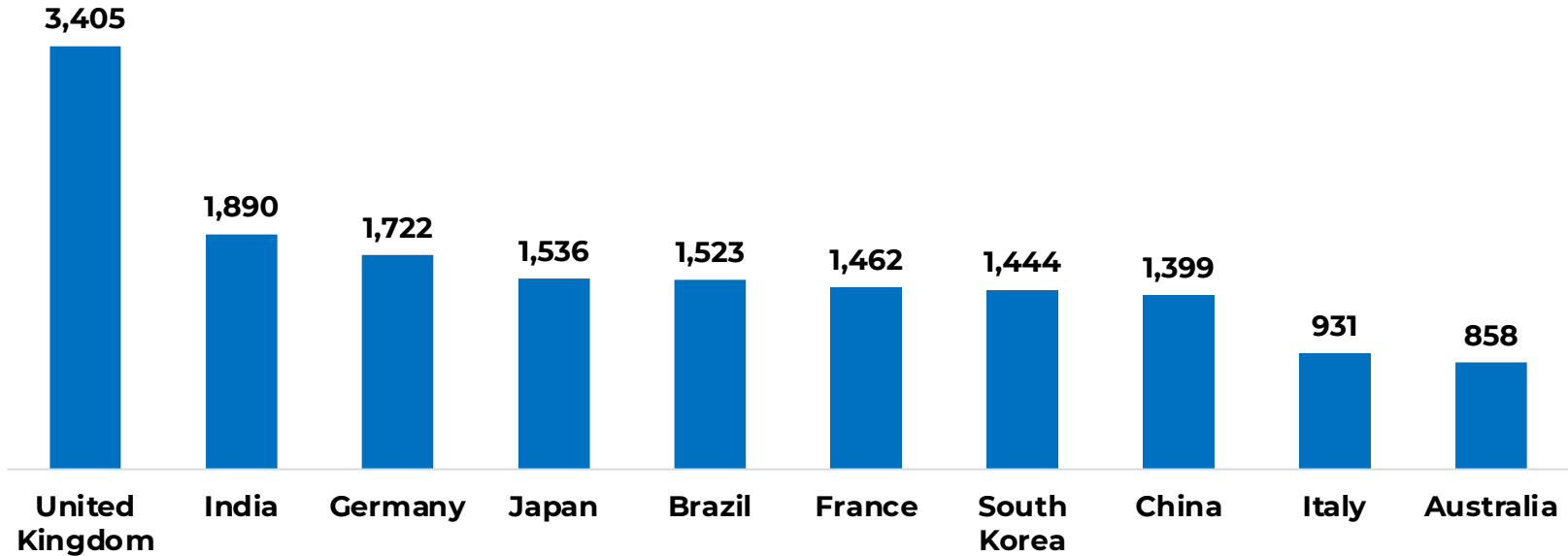
2024 YTD (JAN-OCT): OVERSEAS TRAVEL TO THE U.S.

(Visitation in thousands)



2024 YTD (JAN-OCT): TOP 10 OVERSEAS INBOUND MARKETS TO THE U.S.

(Visitation in thousands)



Total International Travel Spending to the U.S. 2024 YTD (Jan-Sep)

14%

YTD YoY %
Change

\$189.3B

YTD (Jan – Sep)

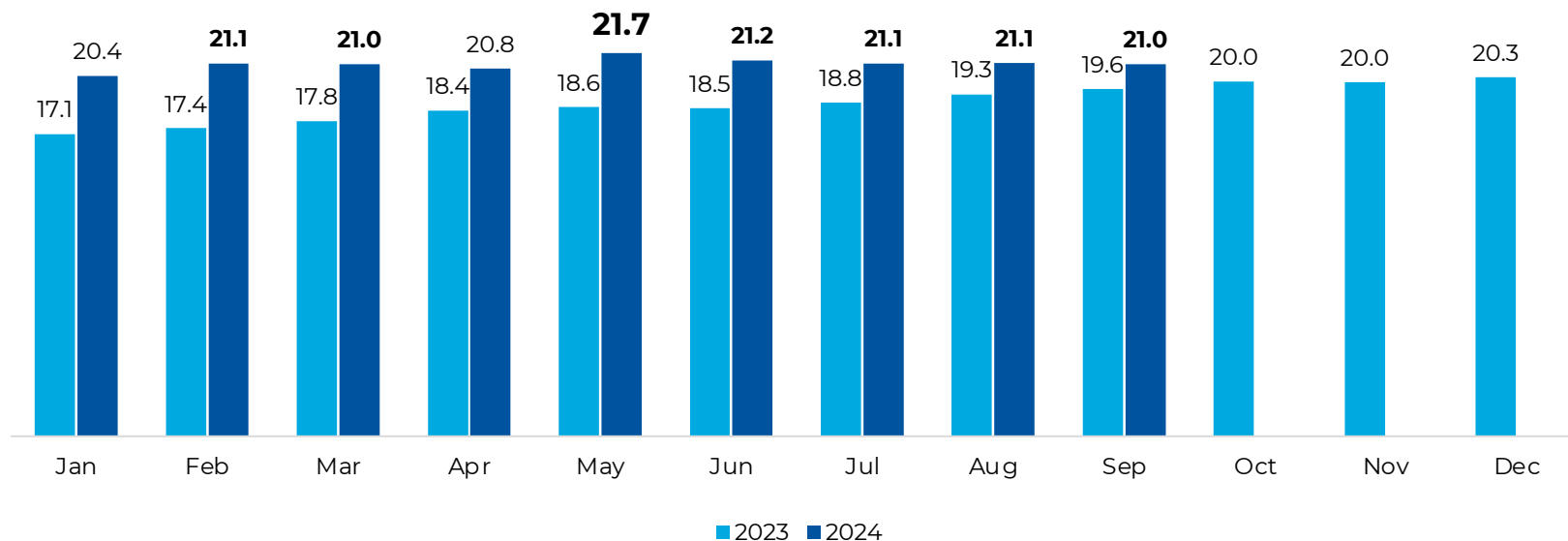
+6%

Over 2019 levels



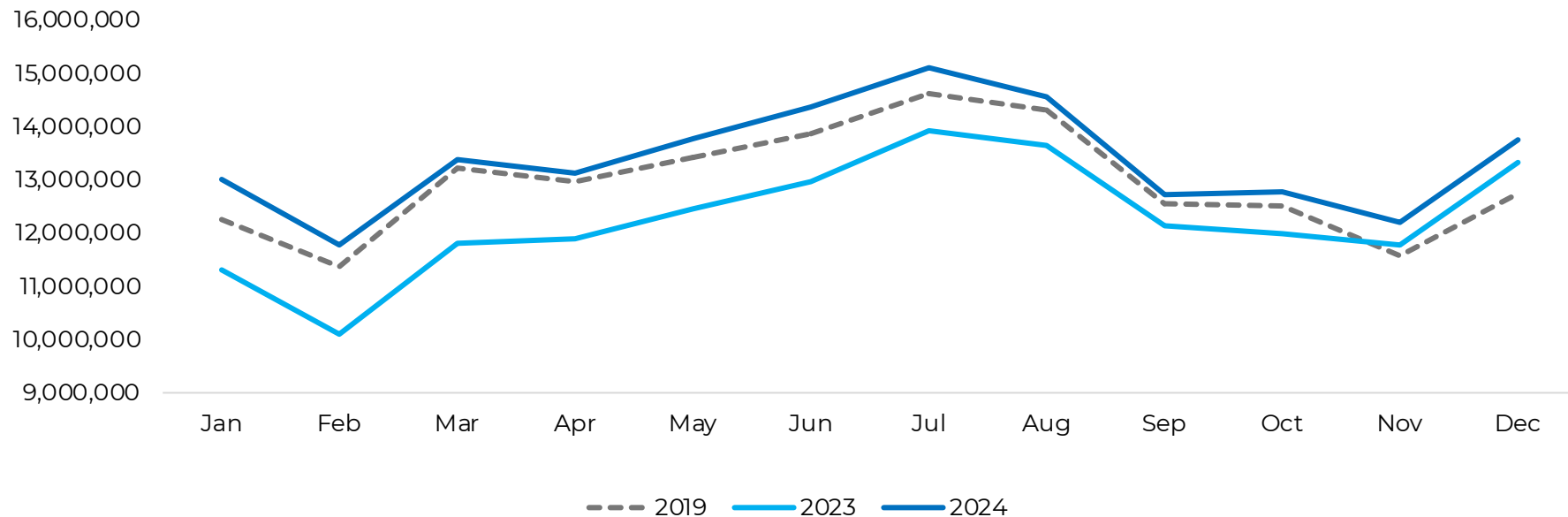
7 MONTHS OF SPENDING ABOVE \$21B THIS YEAR

(spending in billions)



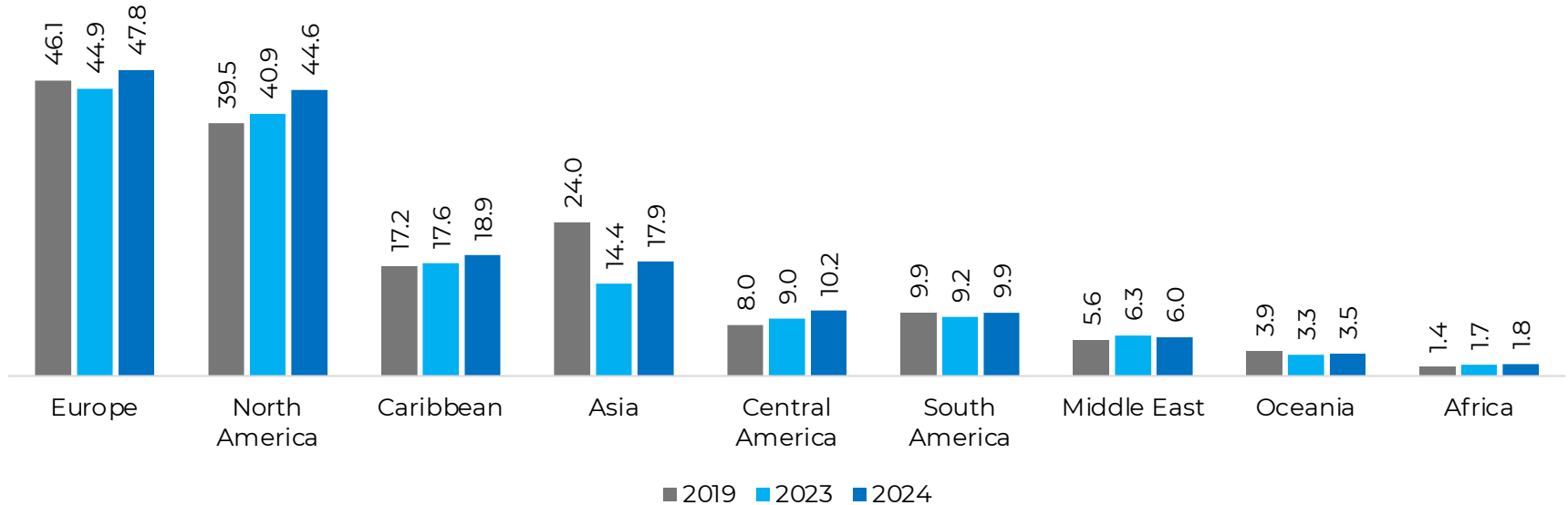
■ 2023 ■ 2024

U.S. INBOUND SCHEDULED AIR CAPACITY



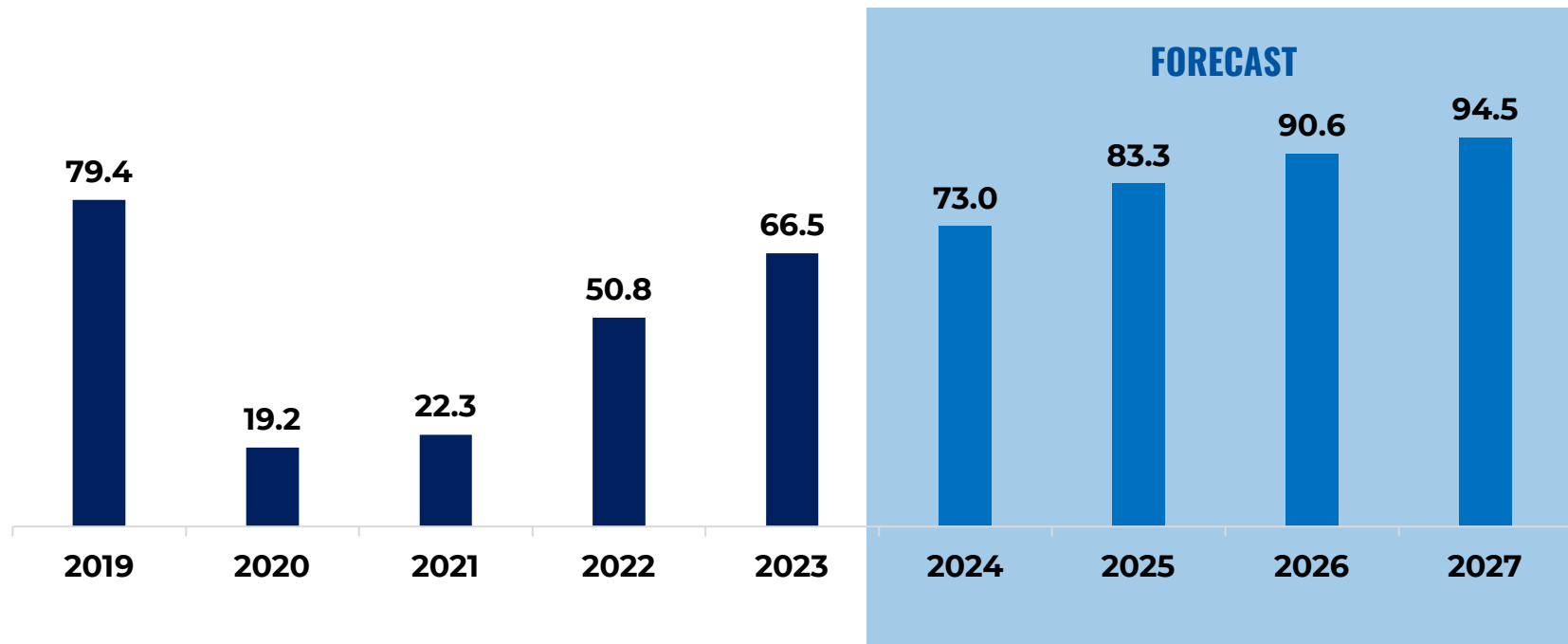
2024 U.S. INBOUND SCHEDULED AIR CAPACITY BY REGION

(Seats in millions)



TOTAL INTERNATIONAL TRAVEL TO THE U.S.

(Visitation in millions)



KEY TAKEAWAYS

Strong recovery:

1. 13% increase in overseas arrivals
2. Visitor spending up 14% YoY
3. Air capacity exceeding pre-pandemic levels

Brand USA

FY24 PRELIM CLOSE



FY24 PRELIMINARY YEAR-END FINANCIAL HIGHLIGHTS

(As of September 30, 2024)

- **Revenue**

Total revenue YTD: \$132.58M

Cash Contributions: \$68.49M

In-Kind Contributions: \$62.82M

Sponsorships and Other: \$1.27M

- **Expenses**

Total Program Expenses: \$253.11M

- **Cash**

Cash Reserves are strong

- **Travel Promotion Fund**

Met the match requirements for FY24

Brand USA

FY25 Highlights



FY25 OBJECTIVES

1

Establish and maintain the USA as the preferred global travel destination

2

Contribute to community prosperity by driving international visits and spend

3

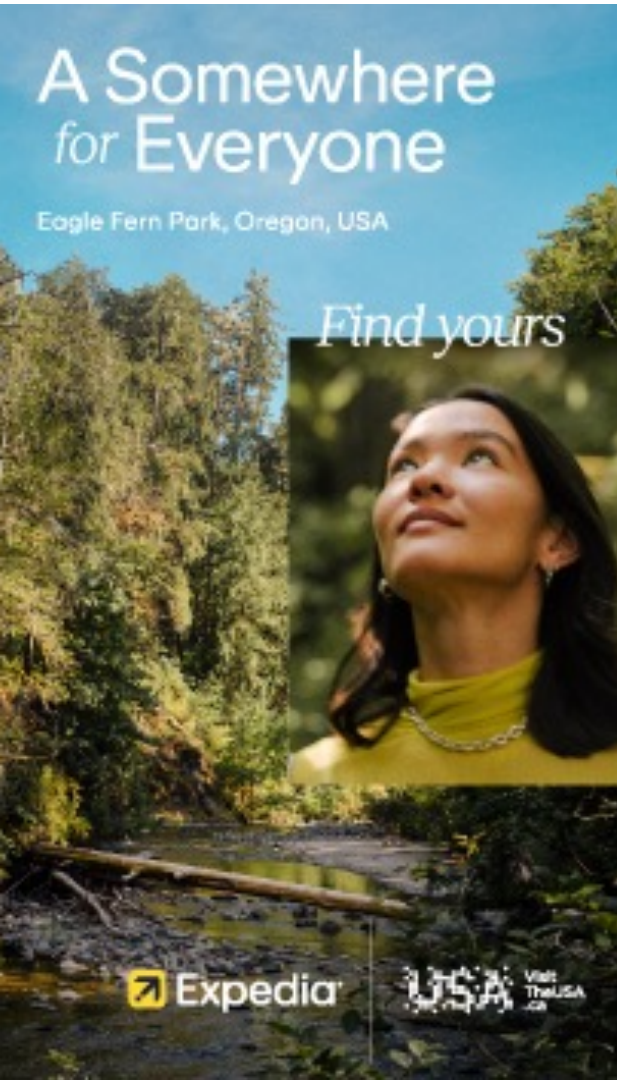
Lead & engage stakeholders of the U.S. travel industry

4

Maintain excellent organizational integrity and reputation, setting the standard for the global travel industry



EXPEDIA X BRAND USA



A 360° partnership with Expedia

Together, we've created a comprehensive full-funnel co-op campaign:

- Objective: encourage multi-city dispersal while negating the perception that planning a vacation to the US needs to be complex.
- Target Markets: Canada and Japan
- Timing: November 12th 2024 through February 2025
- KPIs:
 - Awareness: Brand Perception, Search Uplift
 - Engagement: Site visitation, VTR, CTR, VCR, Time spent with Content
 - Conversion: Increase in # of visitors, Visitor Frequency, ROAS, Room Nights

In addition, this partnership has unlocked new B2C and B2B opportunities with Expedia.

A woman's silhouette is shown from the side, looking out over a body of water at sunset. The sky is a gradient of blue, orange, and yellow, with the sun low on the horizon. The water reflects the warm colors of the sky. The woman's hair is blowing in the wind.

Platform

A Somewhere *for* Everyone

A full funnel ecosystem to inspire and cue conversions

GRAB ATTENTION

High impact inspiration showcasing the breadth of what the USA has to offer

KPI: Awareness



Hero Film: 30
OLV, CTV, YouTube (Paid & Organic)

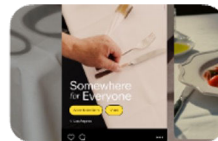
STAY RELEVANT

Deep dive into USA **road trip destinations** through passions in contextual placements

KPI: Consideration



Vignettes :15
OLV, CTV, Paid Social, YouTube
(Paid & Organic)



Social Extension
Paid & Organic Social



OOH
Dynamic Digital

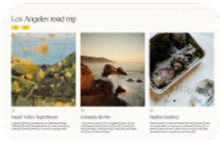


Sponsored Editorial
Expedia Magazine & Social

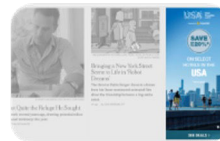
DRIVE ACTION

Empower the decision to book a trip to the USA, with Expedia

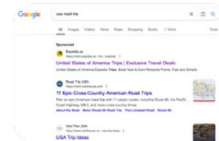
KPI: Bookings



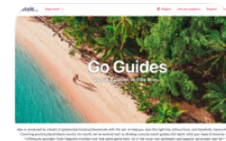
Editorial Tritineraries
Microsite



Banners
Onsite & Offsite MeSo Display

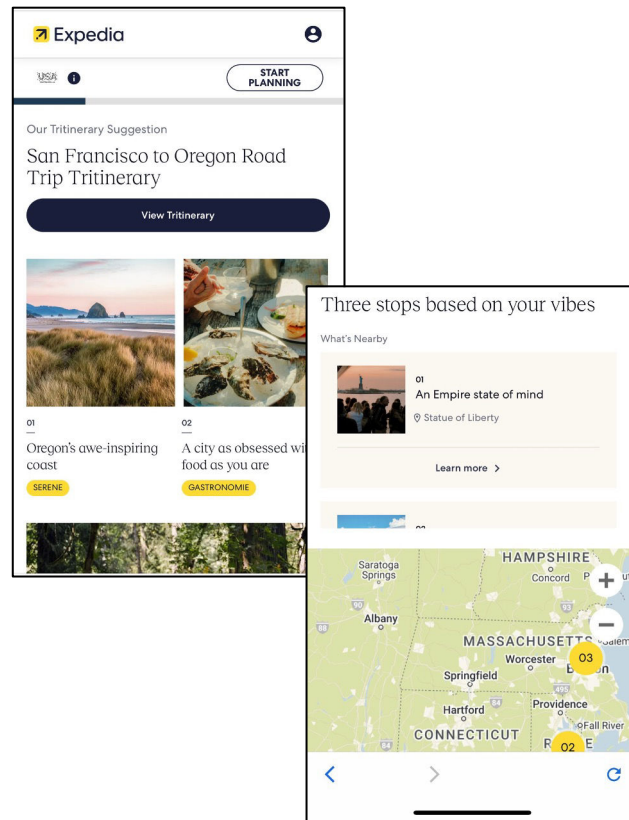
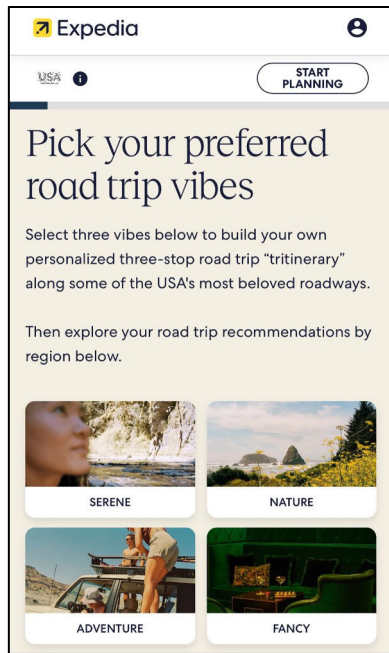


SEM
Keyword & Sitelinks



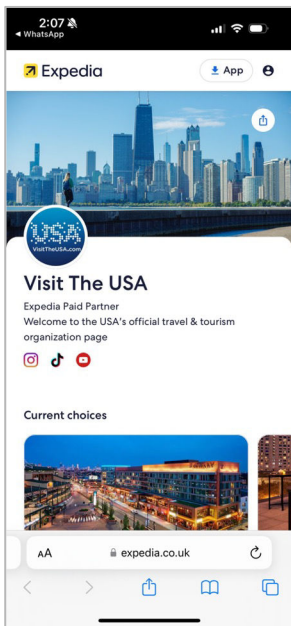
Go Guides
hotels.com

From *Vibes* to bookable Tri-Tineraries



New Opportunities Unlocked

Expedia Travel Shops



Expedia B2B Network





Join our webinar with Brand USA

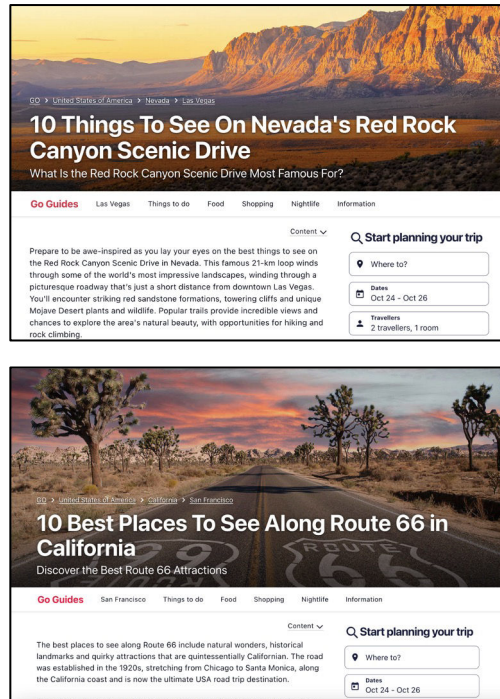
Date: October 8, 2024
Time: 3:00pm ET
Host: Beata Kaminski, Account Manager, Expedia TAAP
Guest Speaker: Casey Canevari, Global Trade Development (Canada), Brand USA

We're excited to invite you to an exclusive webinar hosted by Expedia TAAP, featuring insights from **Brand USA** on their latest initiatives designed to empower travel advisors like you.

About Our Guest Speaker: Casey Canevari is responsible for building and maintaining relationships with Canadian travel trade partners at Brand USA. With a focus on market activations, co-op marketing programs, and budget oversight, Casey's role is instrumental in promoting U.S. destinations to Canadian travellers.

What You'll Learn:

SEM to Hotels.com

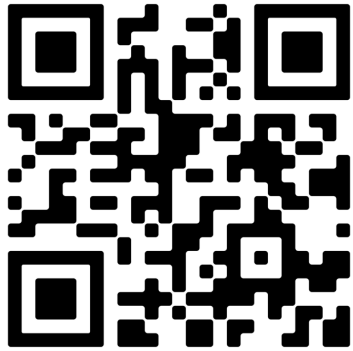




GLOBAL TRADE

Brand USA

FY25 MISSIONS



Jan. 13-17, 2025

Mexico Sales Mission

Jan. 19-24, 2025

India Sales & Media Mission

Feb. 13, 2025

Australia B2B

March 17-21, 2025

South America Mission

April 28-May 2, 2025

Canada Connect East

May 20-23, 2025

Canada Connect West

July 21 – 25, 2025

Japan & South Korea Sales Mission

INDIA SALES MISSION

Hyderabad January 19 - 24, 2025

Sold Out:

- 44 companies
 - 58 attendees
-



Brand USA

INDIA MEDIA MISSION

Hyderabad January 19 - 24, 2025

- 10 organizations
 - 10 delegates
-





INDIA CEO IMMERSION

Hyderabad January 18 - 24, 2025

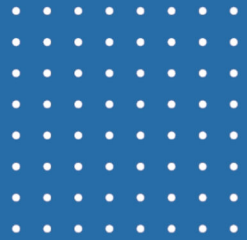
- Showcase India's opportunity, possibility, and potential
- Gain a greater understanding of the travel, media, consumer, economic landscapes of the market.





Objectives 2 & 3

TRAVEL WEEK U.K. & EUROPE



BRAND USA TRAVEL WEEK



U.K. & EUROPE 2024



BRAND USA MEDIA FORUM



BRAND USA CEO SUMMIT

OCTOBER 21-24, 2024

LONDON - etc VENUES COUNTY HALL

ALL TRACKS IN NUMBERS



917

ATTENDEES

179

EXHIBITOR
ORGANIZATIONS

183

BUYER
ORGANIZATIONS

83

MEDIA
ORGANIZATIONS

20

MARKETS

4

VENUES

5

EVENING EVENTS

9

SPONSORS

6,861

PRE-SCHEDULED
APPOINTMENTS

11

MARKET
UPDATES

19

ENRICHMENT
SESSIONS

60

ENRICHMENT SESSION
SPEAKERS

MEDIA COVERAGE HIGHLIGHTS

Interview: Brand USA chief executive Fred Dixon



By Robin Searle | October 21, 2024, 07:00



The new boss of America's destination marketing organisation tells Robin Searle why he is optimistic for future growth

Travel Weekly U.K.

La Brand Usa Travel Week UK & Europe apre i battenti di un'edizione record

21 ottobre 2024 15:01



Ha aperto i battenti oggi a Londra la Brand Usa Travel Week UK & Europe.

La Travel Week, lanciata nel 2019, si è affermata come un evento chiave per mettere in contatto buyer ed espositori di Regno Unito ed Europa con un focus specifico sugli Stati Uniti. Con l'edizione del 2023.

L'evento ha raggiunto numeri straordinari con 794 partecipanti, tuttavia, la Travel Week 2024 promette di superare tali risultati, con una crescita significativa del 26% nel numero di espositori presenti rispetto allo scorso anno.

L'edizione 2024 vede la partecipazione di 183 buyer britannici ed europei con oltre 179 espositori statunitensi, che si incontreranno per un totale di 5.443 incontri programmati, segnando una cifra da record.

Quotidiano Travel Italy



FVW Germany

Nearly 17 million Europeans expected to visit the United States in 2025

Brand USA Travel Week UK & Europe in London

On the occasion of Brand USA Travel Week UK & Europe, Fred Dixon, CEO of Brand USA, who was participating for the first time, announced that in 2025, nearly 17 million European travelers would go to the United States, a record.

Nearly 17 million Europeans expected to visit the United States in 2025
Reviewed by Peter
00:00 00:00

Written by Celine Eymerly on Tuesday October 22, 2024



Tourmag France

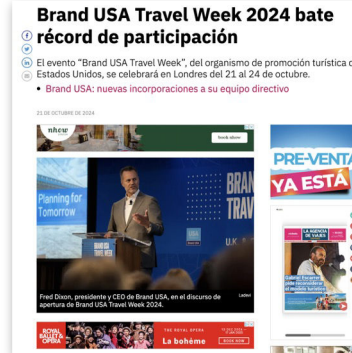
Brand USA Travel Week 2024 vuelve a Londres batiendo récords de participación

Brand USA cierra su Brand USA Travel Week 2024 con cifras récord de asistentes y reuniones, consolidándose como una plataforma clave para el crecimiento del turismo estadounidense.

20 DE OCTUBRE DE 2024



Hosteltur Spain



Ladevi.info Spain

Other Board Business



LEADERSHIP ELECTIONS

- **Chair**
 - Elliott Ferguson, President & CEO Destination DC
 - **Vice Chair**
 - Lauren Bailey, CEO and Co-Founder, Upward Projects
 - **Treasurer**
 - Kristen Esposito, Principal, Esposito Global Partners
 - **Secretary**
 - Allen Orr, Founder, Orr Immigration Law Firm
-



LOOKING AHEAD



Thank you.

CONSUMER

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INDUSTRY

 TheBrandUSA.com

    @BrandUSA