

Brand USA: International Tourism Outlook



Chris Thompson
President/CEO, Brand USA



Hernando Desoto Bridge, Memphis
Jeff Adkins



BRAND USA: INTERNATIONAL TOURISM OUTLOOK
Chris Thompson, Brand USA President & CEO

USA
VisitTheUSA.com

Brand USA

BRAND USA TRAVEL WEEK U.K. & EUROPE 2022

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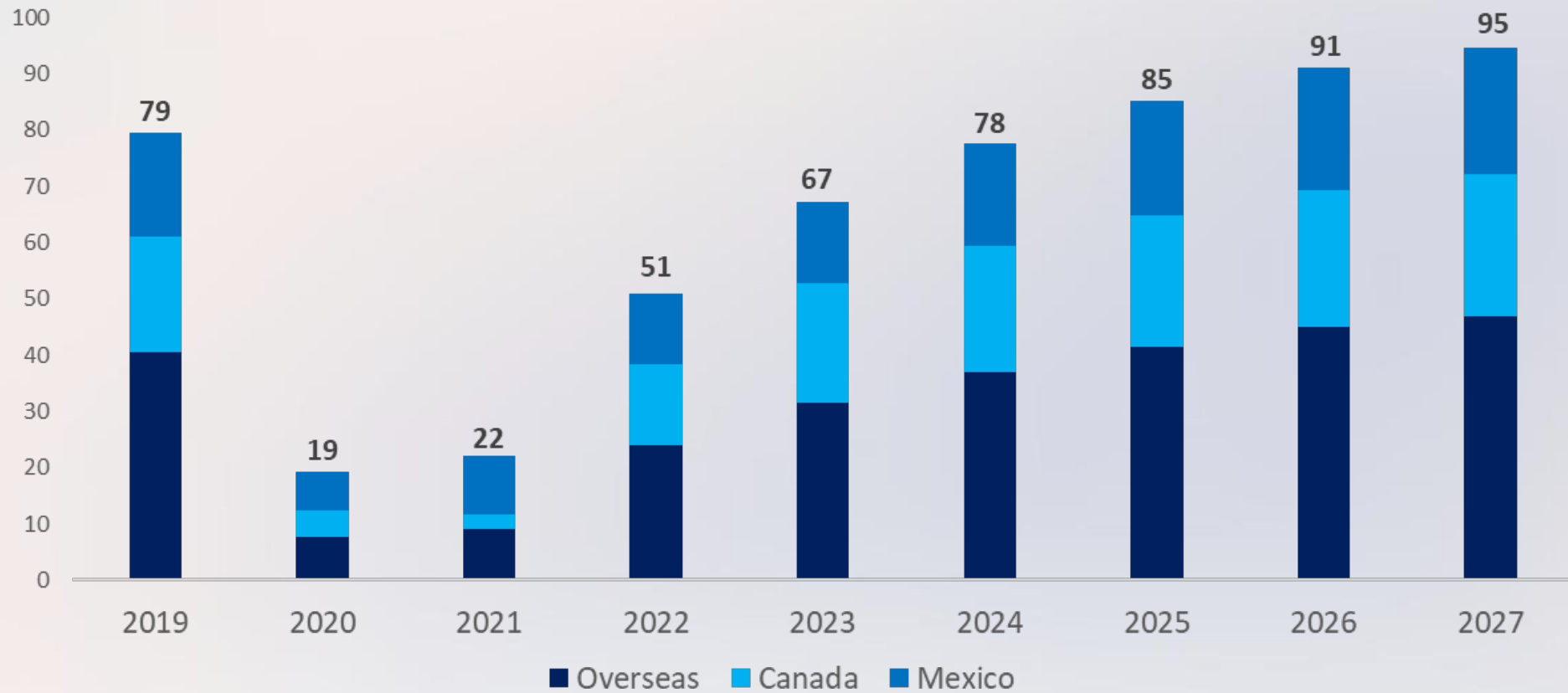
INTERNATIONAL VISITATION MORE IMPORTANT THAN EVER BEFORE



Brand USA Travel Week 2022
Frankfurt, Germany

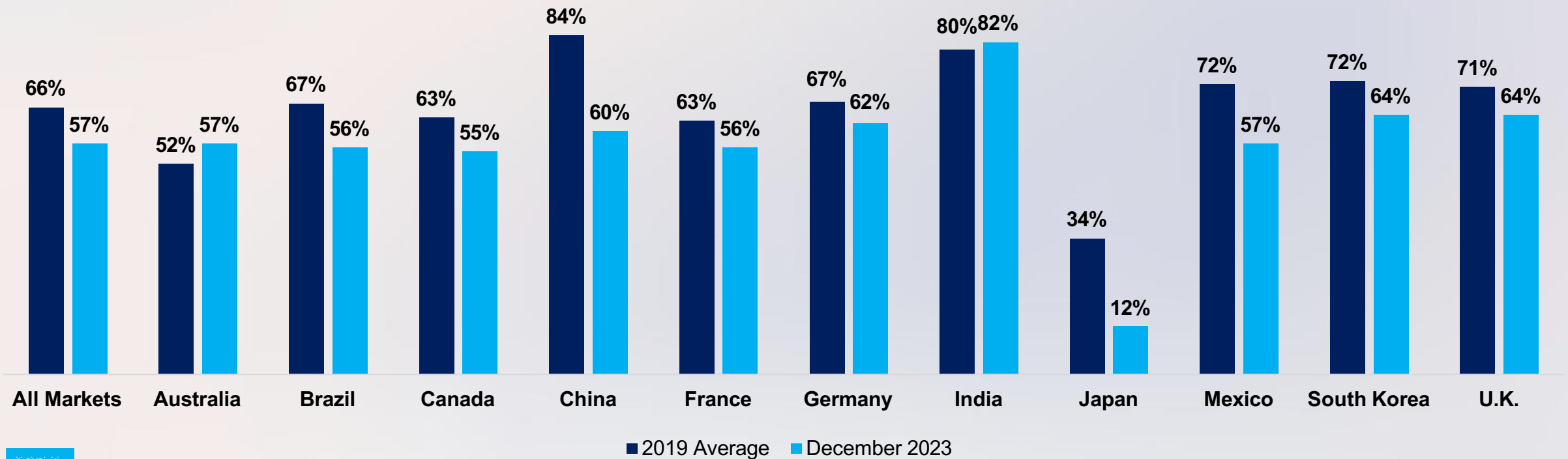
USA Inbound Travel

The USA will surpass pre-pandemic visitation in 2025



Likelihood to Travel Internationally

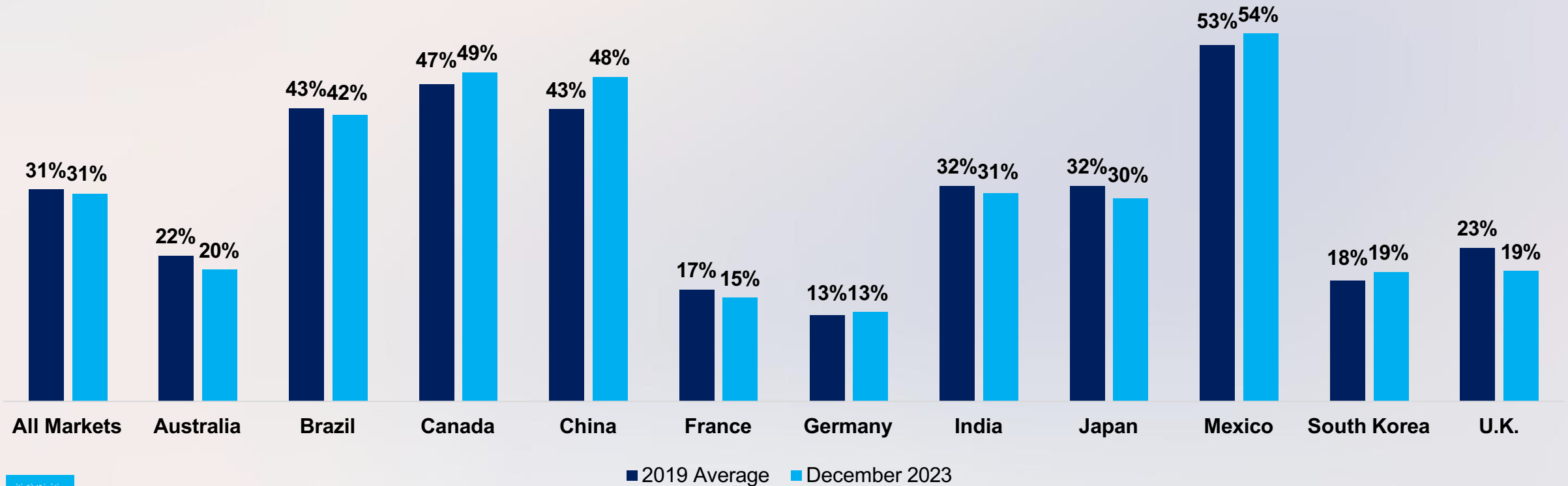
% Very or Somewhat Likely to Travel Internationally in the Next 12 Months



Source: Brand USA/Big Village's Caravan Omnibus Study, December 2023

Likelihood to Travel to the USA

% Very or Somewhat Likely to Visit the USA in the Next 12 Months



Source: Brand USA/Big Village's Caravan Omnibus Study, December 2023

International
Inbound
Spending
—
2023

\$193B

SPENT ON TRAVEL TO & WITHIN THE USA

+29%

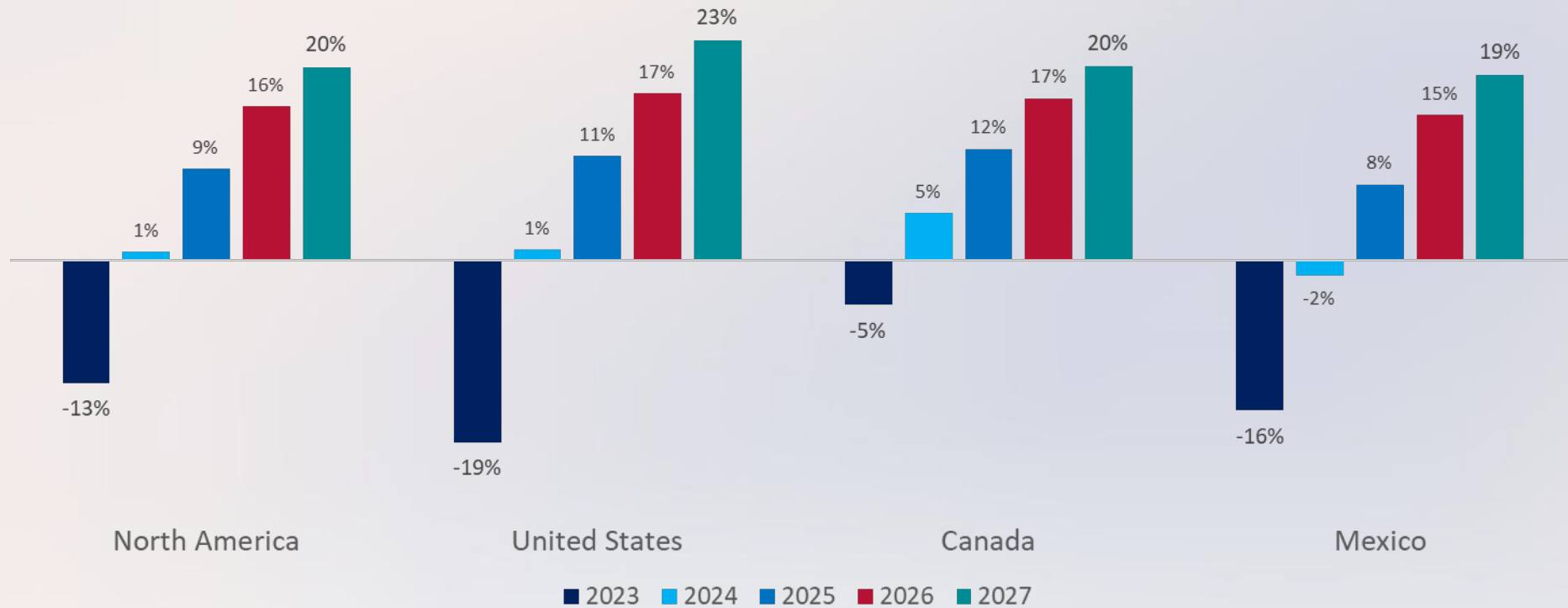
OVER NOV. 2022

\$557M

DAILY SPENDING

North America Inbound Travel

North America: International Arrivals (% change over 2019 levels)





USA

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Brand USA

MARKETING THE USA

Brand USA Mega Fam
Pontiac, Illinois

Post-COVID International Travel Trends



- **Travel is integral to our wellbeing**



- **Maximize experiences in one trip**



- **Localization with intention**

MARKETING THE USA

CONSUMER MARKETING

We develop strategic marketing initiatives to reach potential travelers across owned, paid, and earned media channels that inspire them to visit the USA.

TRAVEL TRADE OUTREACH

We deliver best-in-class programs, training, and campaigns to the global travel trade.

COOPERATIVE MARKETING PROGRAMS

We create 100+ programs in more than 20 markets that provide our US partners the opportunity to reach international travelers in ways they would be challenged or unable to do on their own.

FY2024 Target Markets

North America

Canada
Mexico

Latin America

Argentina
Ecuador
Peru
Chile
Colombia
Brazil

Europe

United Kingdom

Ireland

Germany

France

Spain

Italy

The Nordics

*(Denmark, Norway, Sweden,
Finland, Iceland)*

Benelux

*(Belgium, Netherlands,
Luxembourg)*

Asia & Oceania

Australia & New
Zealand

South Korea

Japan

India

China

Southeast Asia

FY2024 Global Marketing Activity Timeline

	FY 2024											
	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
AUSTRALIA	Consumer Marketing			Coop Marketing	Consumer Marketing	Consumer Marketing	Consumer Marketing	Consumer Marketing	Consumer Marketing			Consumer Marketing
BRAZIL	Consumer Marketing					Coop Marketing	Consumer Marketing	Consumer Marketing	Consumer Marketing			
CANADA	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		Coop Marketing		Coop Marketing		Coop Marketing	Coop Marketing
COLOMBIA				Coop Marketing	Coop Marketing	Coop Marketing				Coop Marketing	Coop Marketing	Coop Marketing
FRANCE	Coop Marketing	Coop Marketing			Coop Marketing	Coop Marketing		Coop Marketing	Coop Marketing			
GERMANY		Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		Coop Marketing	Coop Marketing	Coop Marketing			
INDIA			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing				
JAPAN	Coop Marketing	Coop Marketing	Coop Marketing				Coop Marketing	Coop Marketing	Coop Marketing		Coop Marketing	
MEXICO	Coop Marketing				Coop Marketing	Coop Marketing					Coop Marketing	Coop Marketing
S. KOREA			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing		Coop Marketing	Coop Marketing	Coop Marketing
U.K.			Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing	Coop Marketing

Coop Marketing


Consumer Marketing

Missions & MegaFams*



Authentic, Compelling Storytelling



A woman wearing a hat and jeans is walking away from the camera on a dirt path that leads towards a large, white, two-towered barn in the distance. The path is flanked by dark wooden fences. The surrounding area is a lush green field with scattered trees. The sky is overcast with grey clouds.

It's more important than ever to be **top of mind** for consumers and to **raise the USA** within their **travel consideration set**.

Brand USA Marketing Initiatives



- Brand Marketing and Global Advertising

- Social Media & Content Creator Marketing
- United Stories
- Content Marketing
- Digital & Print Magazine
- Earned Media
- Cooperative Marketing

- Brand USA Sales Missions and B2B Events
- Brand USA Global Marketplace & International Pavilion
- Brand USA Travel Week
- Travel Trade Partnerships
- M.I.C.E. Travel
- Tourism Exchange USA
- Cooperative Marketing Activation Programs
- Online Travel Agency (OTA) Campaigns



Experience it all.

In our previous campaign, we declared, "This is where it's at." Now, with "Experience it all," we aim to empower people to imagine and immerse themselves in the diverse and enriching experiences U.S. has to offer.

Our campaign emphasizes that a trip to the U.S. isn't just about reaching your destination. It's about discovering a travel experience that's tailored to your desires and consistently exceeds your expectations. It's not just about the places you visit; it's about the emotions, stories, and lasting moments you create.

An aerial photograph of a tropical beach. The top half of the image shows clear, turquoise water with some darker patches of coral or rocks. The middle section is a wide, golden sand beach. The bottom half shows the silhouettes of palm trees against the sand. The text "More than beaches," is overlaid in white, sans-serif font across the middle of the image.

More than beaches,

BRAND REFRESH

Overview

The USA is a leader in the travel and tourism industry due to our diversity of people, places and experiences. We are an aspirational destination to many, and a lesser known idea to others. As the global traveler changes, it's important to evaluate our position, and adjust it if necessary to ensure our long-term success can be sustained well into the future.

Core Objective

To assess and refine the positioning of the USA travel to create a differentiated position in the global travel market, and ensure a shared brand landscape that will serve the US travel industry.

INDUSTRY RESEARCH

CONSUMER RESEARCH

GLOBAL TRAVEL INSIGHTS

POSITIONING DEVELOPMENT

PUBLIC-PRIVATE COLLABORATION

- Collaboration with the National Travel and Tourism Office and a wide variety of other agencies
- Multi-year National Travel and Tourism Strategy is a key organizing principle
- Engagement with the Travel and Tourism Advisory Board and Tourism Policy Council
- Public-private special initiatives to boost travel and engage counterparts
- Promotion of public lands and waters and other treasures and attractions
- Frequent joint presence at major events
- Partnership with U.S. embassies, consulates, and Commercial Service in countries large and small throughout the globe



GLOBAL REPRESENTATION IN 20 MARKETS

THE AMERICAS

Mexico
Mexico City

Brazil
Sao Paulo

EUROPE

**Germany, Austria,
& Switzerland**
Munich

France
Paris

Benelux
Brussels

Italy
Milan

Spain
Madrid

United Kingdom/Ireland
London

ASIA

China
Shanghai

India
New Delhi

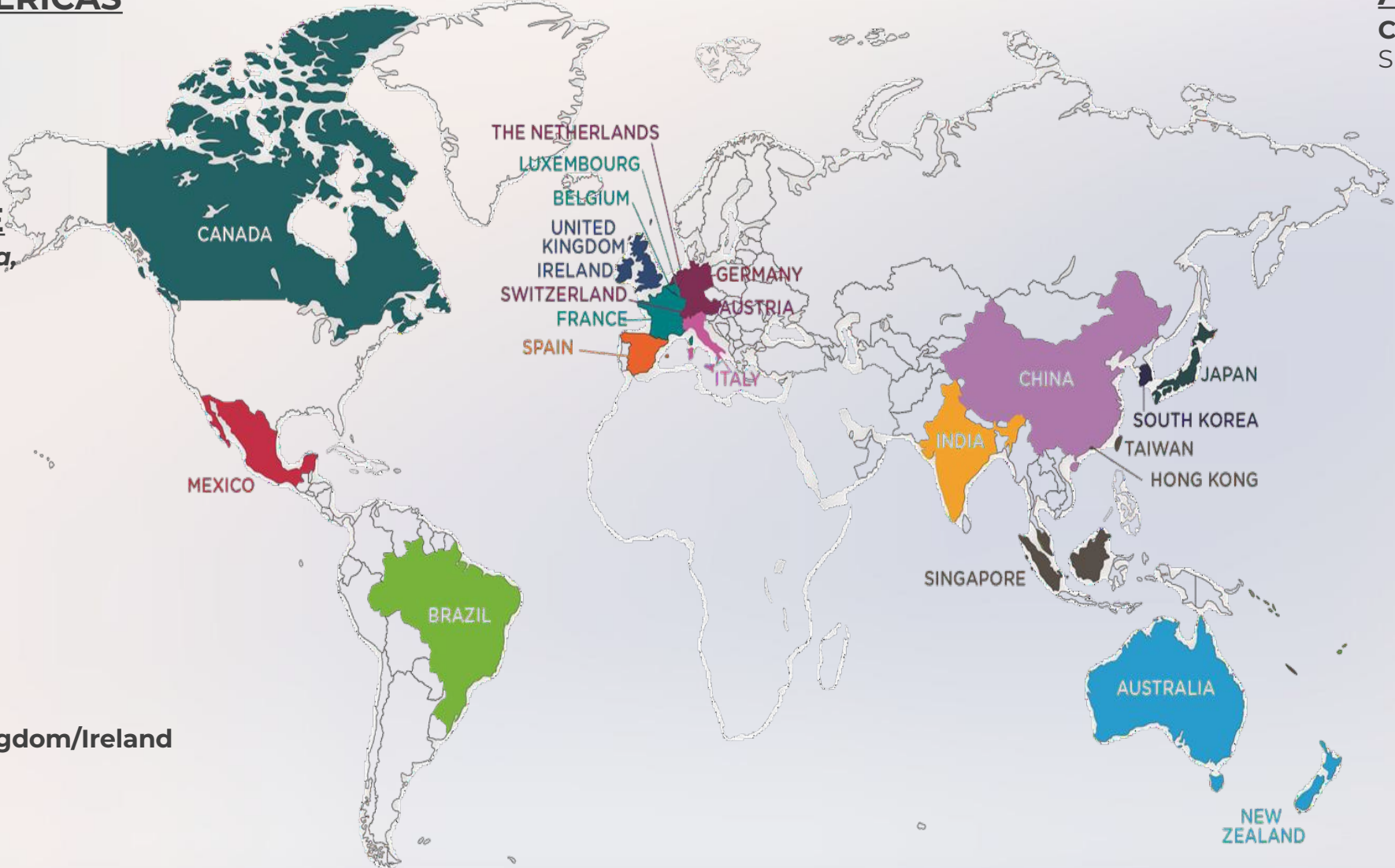
Japan
Tokyo

South Korea
Seoul

Southeast Asia
Taipei

OCEANIA

**Australia
& New Zealand**
Sydney



Brand USA

TRADE ACTIVITY

—
MegaFams

Roadshows

Sales Missions

Tradeshows

Webinars





BRAND USA TRAVEL WEEK



Brand USA

U.K. & EUROPE 2024



OCTOBER 21-24, 2024
etc.venues County Hall | London

A logo for 'USA' where the letters are formed by a grid of small white dots on a blue background.

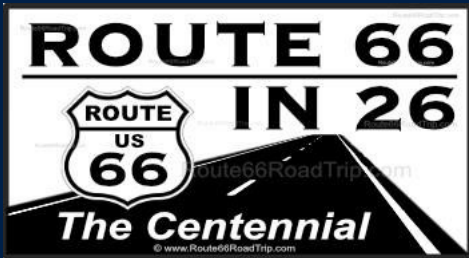
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LEADING WITH OPPORTUNITY

A photograph of four people interacting with a large, stylized 'USA' sign. The sign is a large white outline of the letters 'USA' on a dark blue background. A man in a red sweater is walking on the left, a woman in a plaid shirt is sitting on the 'S', and a man in a red sweater is walking on the right. A woman in a brown jacket is sitting on the 'A'. In the background, there is a sign for 'HAMEL ILLINOIS' and a building.

Hamel, IL
Great Rivers & Roads Tourism Bureau of Southwest Illinois



LA 2028



FIFA WORLD CUP™ 2026 HOST CITIES



USA

ATLANTA

BOSTON ✓

DALLAS

HOUSTON

KANSAS CITY

LOS ANGELES

MIAMI

NEW YORK/NEW JERSEY ✓

PHILADELPHIA

SAN FRANCISCO

BAY AREA

SEATTLE

CANADA

TORONTO ✓

VANCOUVER

MEXICO

GUADALAJARA

MEXICO CITY

MONTERREY



Soul of the South / EuroNews
Memphis, TN



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TRAVEL INDUSTRY

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