



## BRAND USA AND TRAVEL SOUTH USA – THE POWER OF PARTNERSHIPS

USA

VisitTheUSA.com

Brand USA



# Together, We're Marketing The USA!

## **HIGHLIGHTS**

International Travel Landscape

Brand USA Update: Keeping The USA Top of Mind For International Visitation

Our Partnership: A Successful Collaborative Year with Travel South USA (2022-2023)

How Are We Growing: FY24 Evolution of Our Regional Efforts



## INTERNATIONAL TRAVEL LANDSCAPE



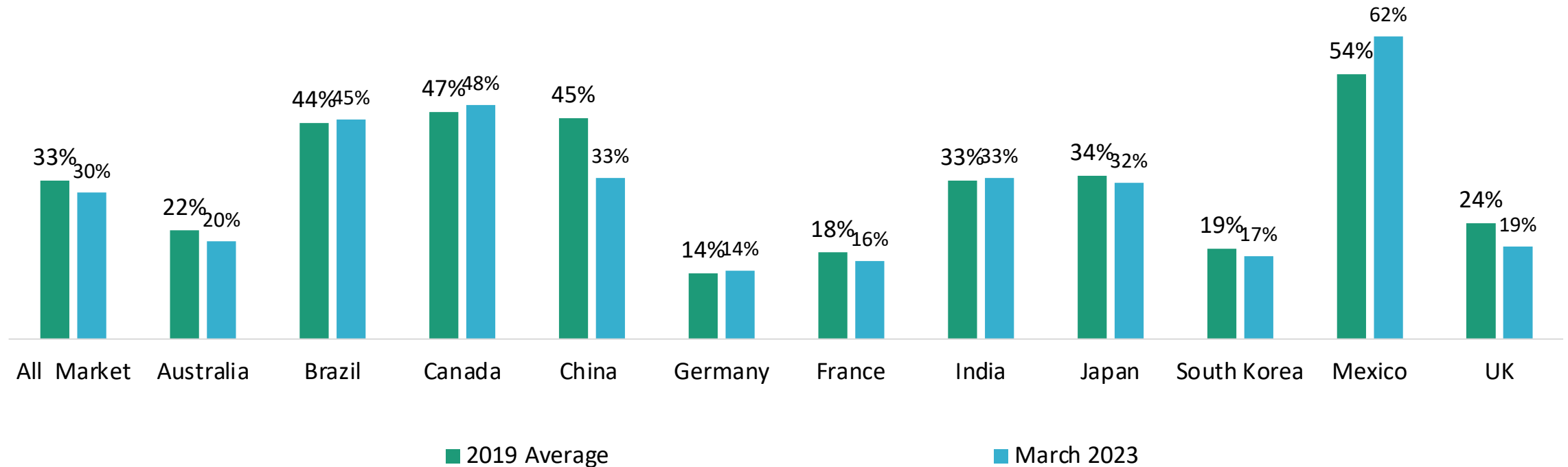
VisitTheUSA.com

Brand USA

# Likelihood to travel to USA in next 12 months

30% are likely or very likely to travel to visit the USA in the next 12 months

% “Likely” or “Very likely”



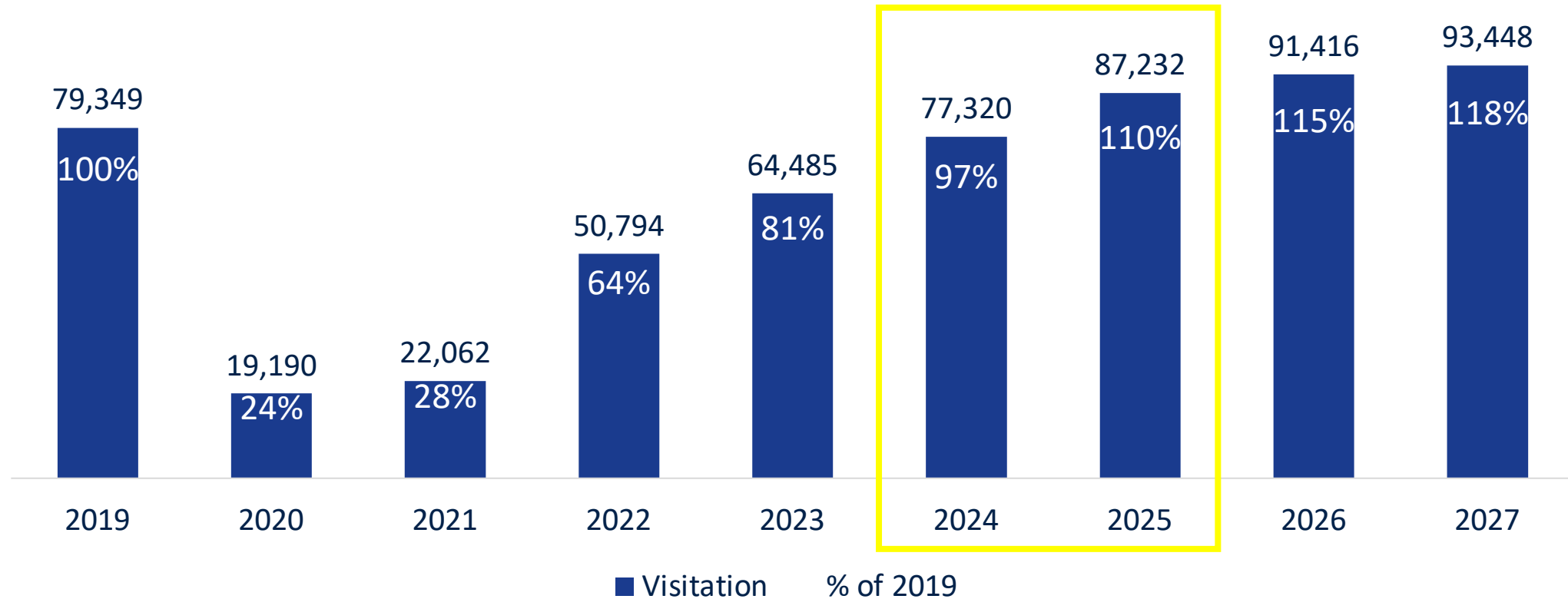
Source: Brand USA/Big Village, custom study



# USA Inbound Travel

Total USA inbound travel is expected to surpass pre-pandemic levels by 2025

Total Visitation to the USA and % of 2019

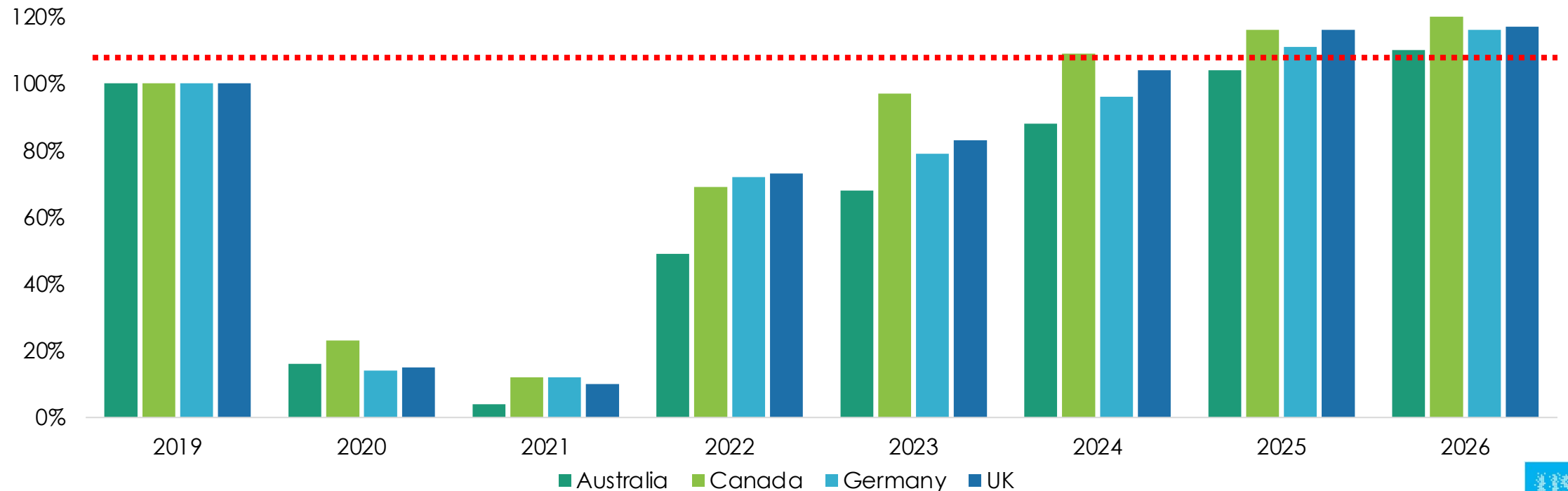


Source: NTTO (January 2023); Tourism Economics (March 2023)

# USA Inbound Travel by Country

Canada and the UK expected to surpass pre-pandemic visitation levels in 2024  
Followed by Australia and Germany in 2025

## USA International Arrivals Forecast % of 2019



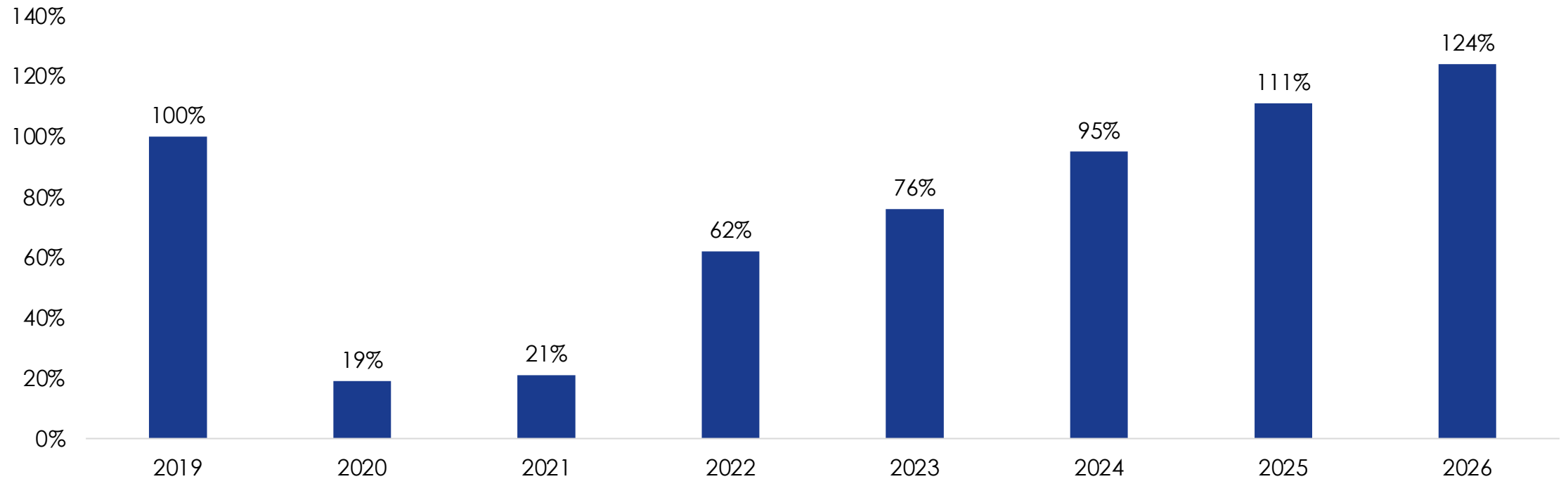
Source: NTO (January 2023); Tourism Economics (March 2023)



# USA Inbound Travel Spend

Total USA inbound travel spend is expected to surpass pre-pandemic levels by 2025

## USA International Spend Forecast % of 2019

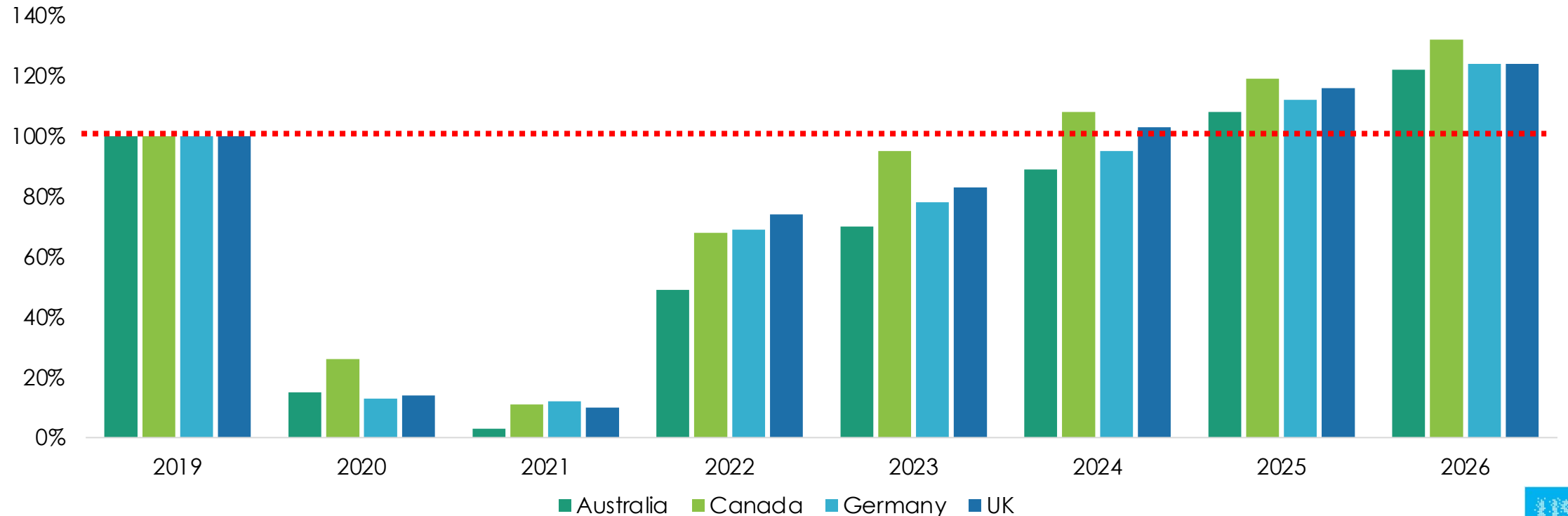


Source: Tourism Economics (March 2023)

# USA Inbound Travel Spend by Country

Total USA inbound travel spend is expected to surpass pre-pandemic levels from Canada and the UK in 2024 and Australia and Germany in 2025

## USA International Spend Forecast % of 2019



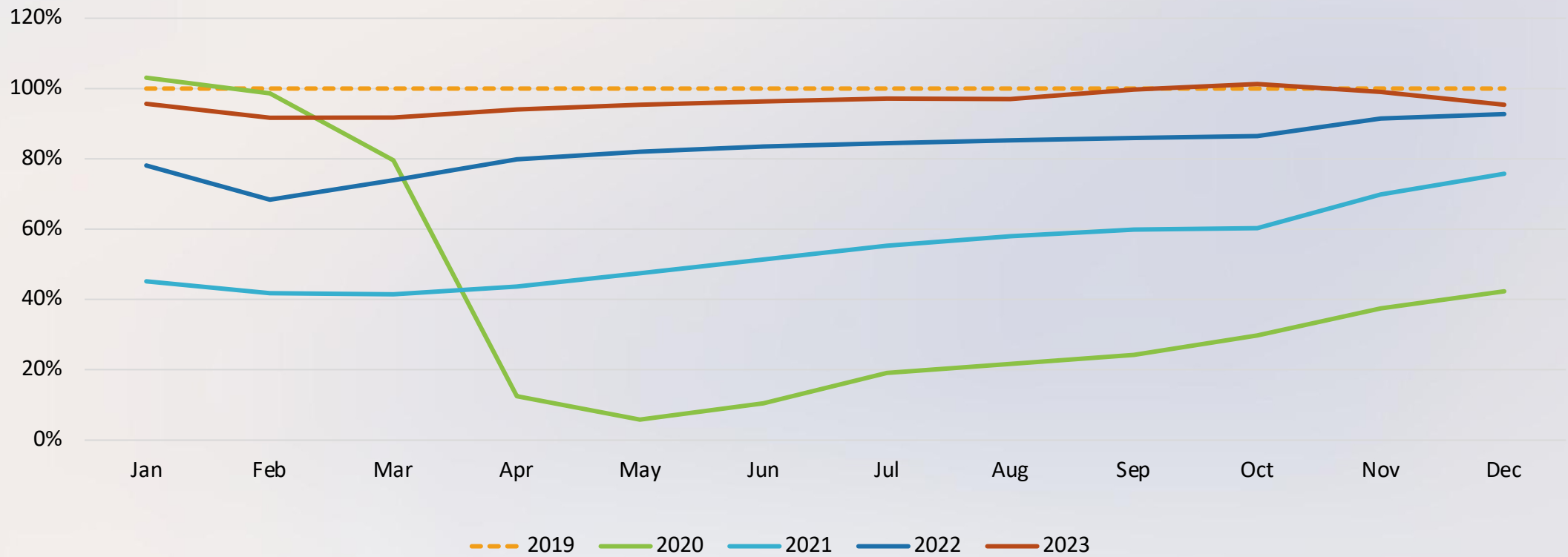
Source: NTO (January 2023); Tourism Economics (March 2023)



# Operating Air Capacity to the USA

Seat capacity is projected to reach 96% of 2019 in late 2023

USA Total Inbound Operating Air Capacity  
% of 2019





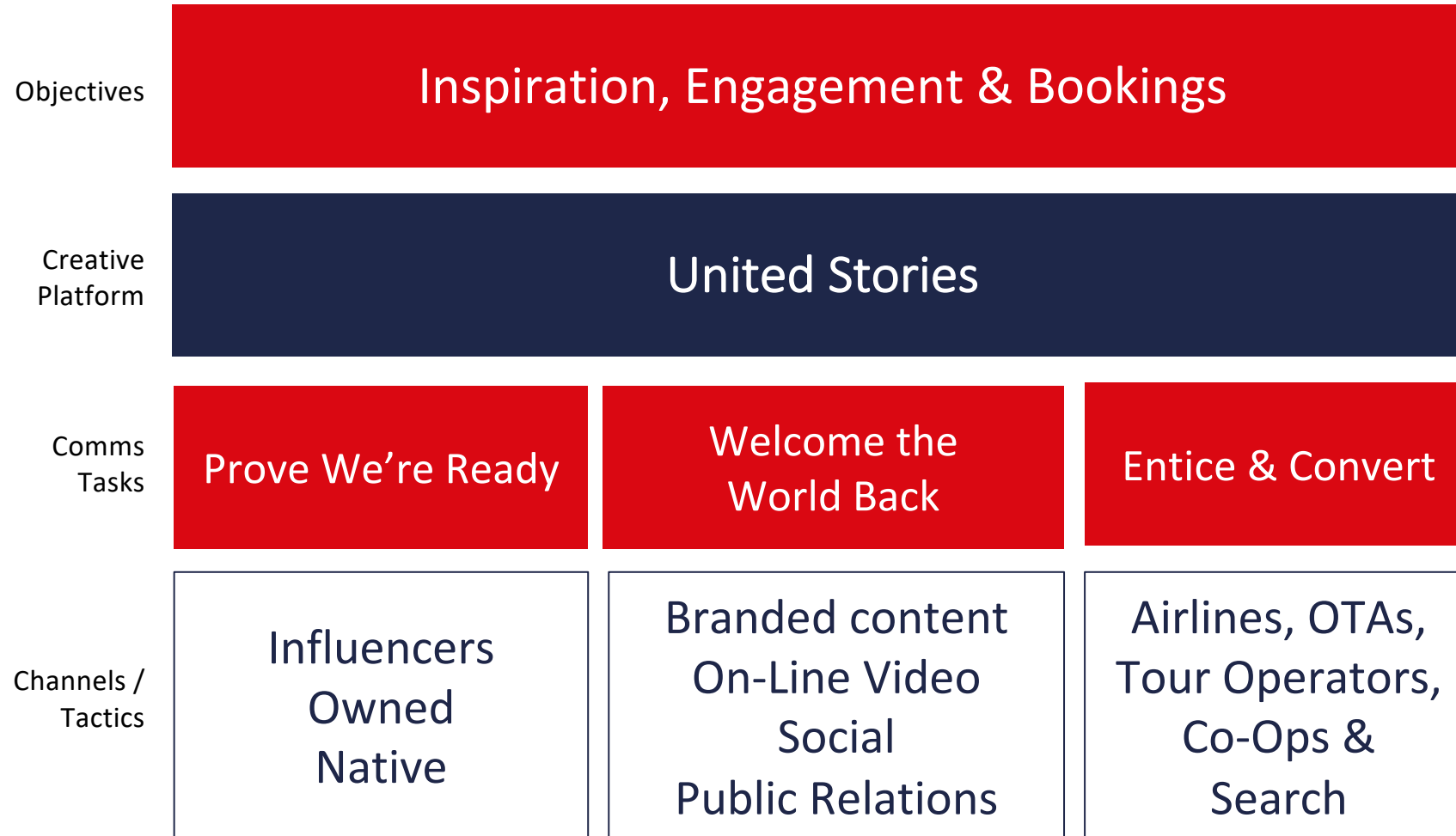
## Keeping The USA Top of Mind for International Visitors

USA

VisitTheUSA.com

Brand USA

# Brand USA Recovery Framework

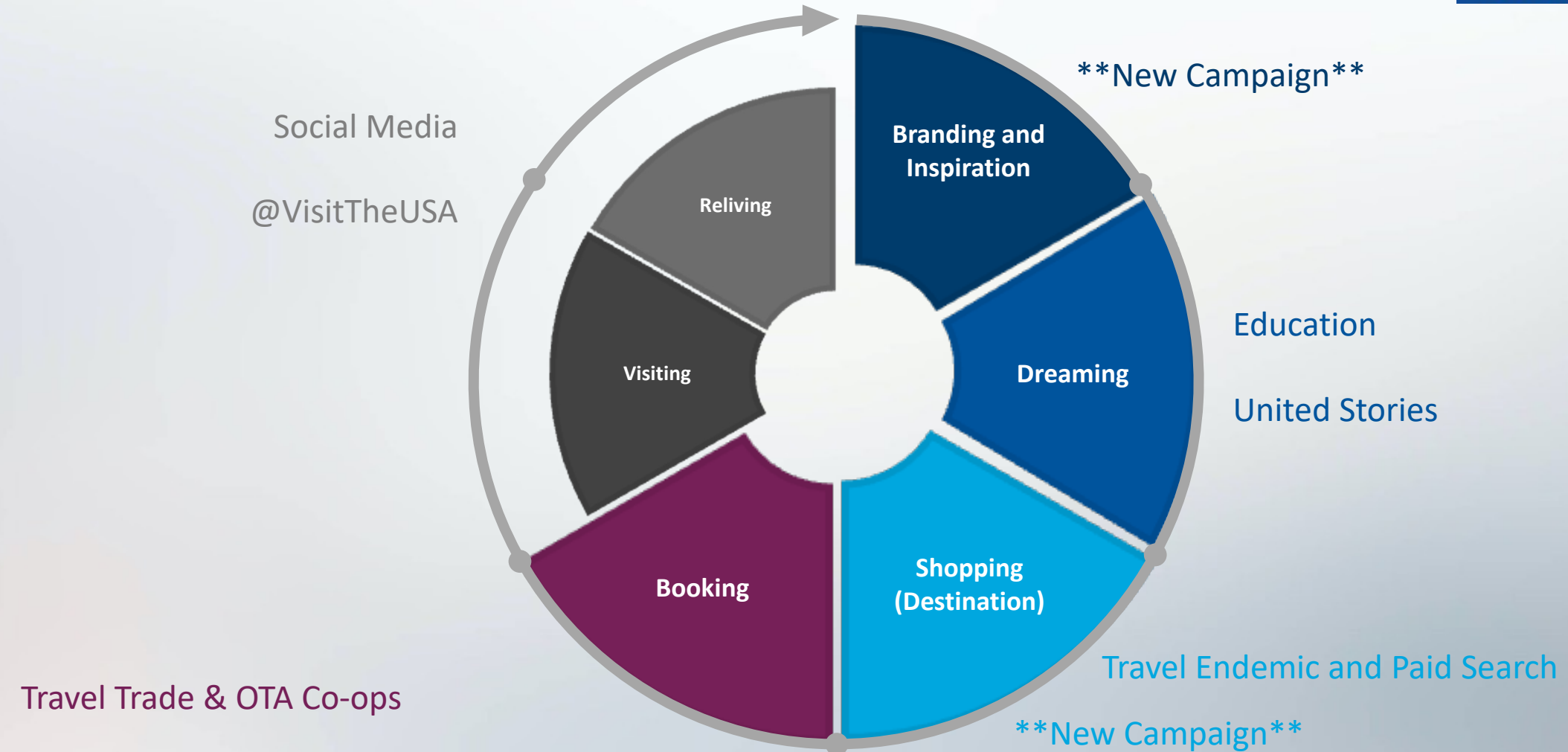


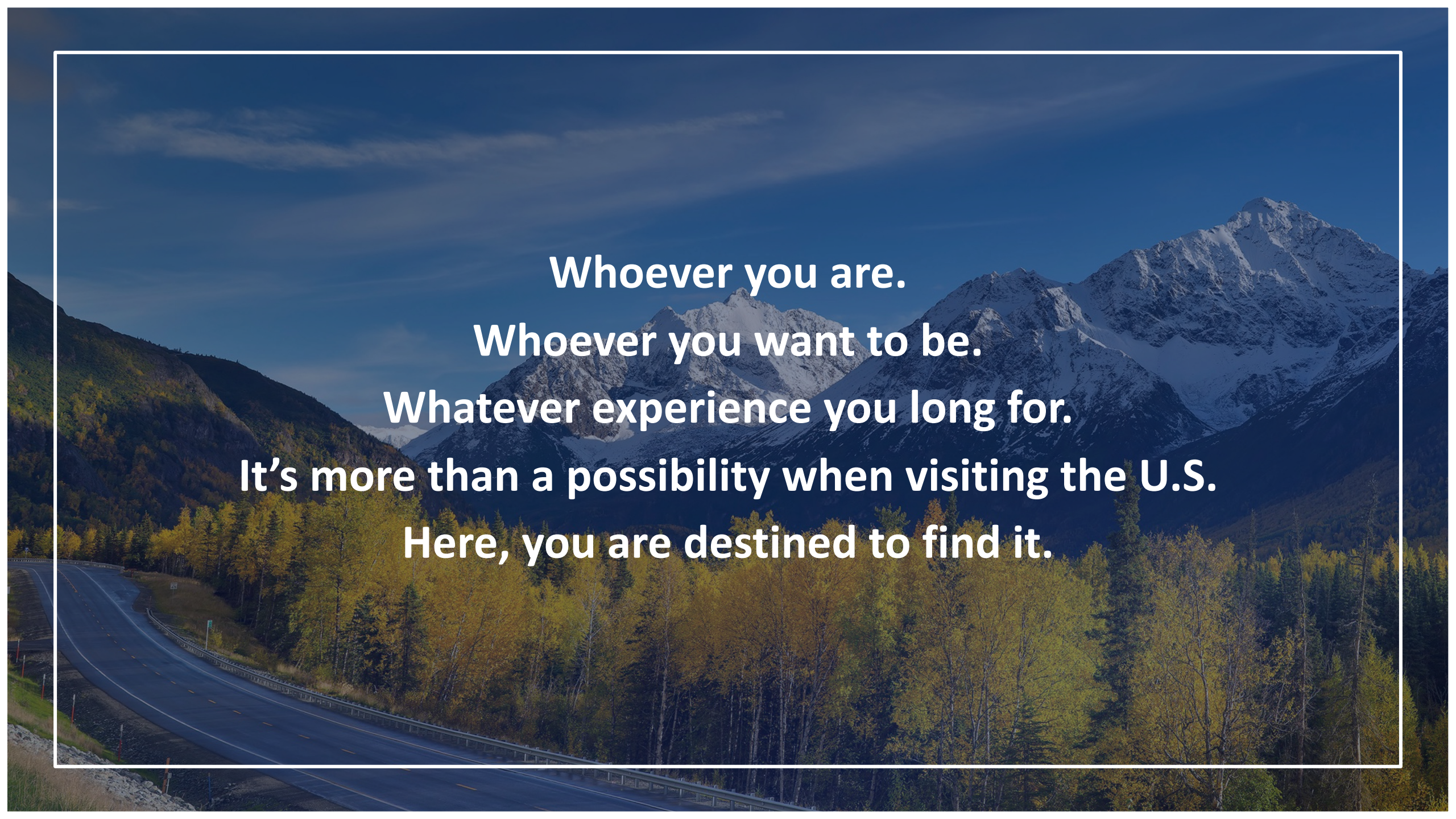
A woman wearing a white hat and blue jeans is walking away from the camera on a dirt path that runs through a lush green field. The path is flanked by dark wooden fences. In the background, there is a large white barn with two blue-roofed towers. The sky is blue with scattered white clouds.

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

Integrated Marketing Priorities

# Media Campaigns Aligned to Traveler Consumer Journey





**Whoever you are.  
Whoever you want to be.  
Whatever experience you long for.  
It's more than a possibility when visiting the U.S.  
Here, you are destined to find it.**



At any moment, there's a perfect vacation out there, waiting for you.

One that's just what you need, and just what you want.

Where you reconnect with your partner under the stars of Yosemite, or find your wild side at mile 346 of Route 66.

The one when you finally taste Mary Mac's mouth-watering chicken in Atlanta, or discover (and obliterate) a perfectly powdered slope in Salt Lake. The one where you play your best hand and win big in Vegas, or the one where the whole family goes, and you all stay in one tent.

Because whether you're seeking a vacation full of - love, friendship, or just some fun - adventure, tranquility or exquisite hospitality - the USA doesn't just have it all. It has nothing less than exactly what you're looking for.

That's why, when it comes to considering your next vacation,

Only the U.S. has the right to say...

A wide-angle landscape photograph of Monument Valley, Arizona. The scene is dominated by large, flat-topped buttes and mesas made of red sandstone. In the foreground, a person wearing a cowboy hat and riding a light-colored horse stands on the edge of a cliff, looking out over the valley. A dirt road winds through the middle ground. The sky is filled with dramatic, layered clouds, with some light breaking through. The overall color palette is warm, with various shades of red, orange, and brown in the rock formations, and blues and greys in the sky.

This Is Where It's At.



A person and a child are standing on a snowy mountain slope, looking out over a valley. The person is wearing an orange jacket, a blue backpack, and a black helmet. The child is wearing a blue and orange jacket, orange pants, and a white helmet. The background shows a vast valley with mountains and trees under a cloudy sky.

Discover your best in the USA



## A Successful Collaborative Year With Travel South USA

## *Our Partnership*

# Current Programs, Featured Destinations, & Market Impact

## TRAVEL SOUTH & BRAND USA REGIONAL PROGRAMS

### HIGHLIGHTS

2022-23 Explore the South Programs  
Travel South Subsite

## CUSTOM PARTNER STRATEGIES

### HIGHLIGHTS

Soul Of The South Campaign  
Custom TSUSA State Strategies

## FEATURED U.S. PARTNER INCLUSIONS

### HIGHLIGHTS

Regional Video Storytelling  
Global Travel Trade Initiatives

# Our Regional Programming Successes

## QUICK LOOK BACK...

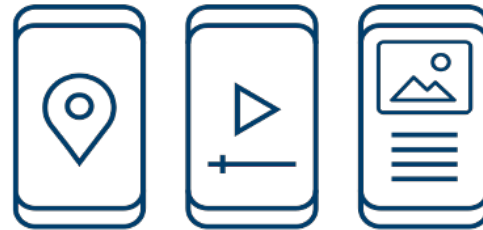
In 2022, across regional programs targeting Canada, Germany, and Australia



**\$13M**

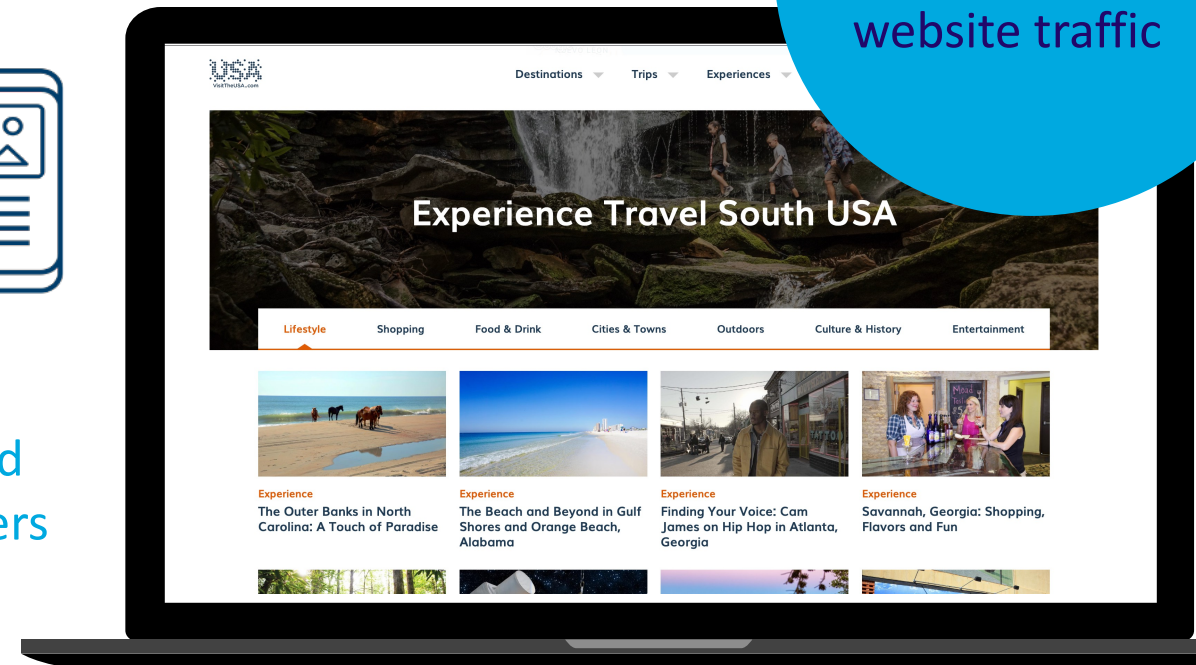
Generated in hotel revenue

## ...AND WHERE WE ARE NOW



**24M**

impressions generated targeting U.K. consumers



**+47%**  
YOY growth in website traffic

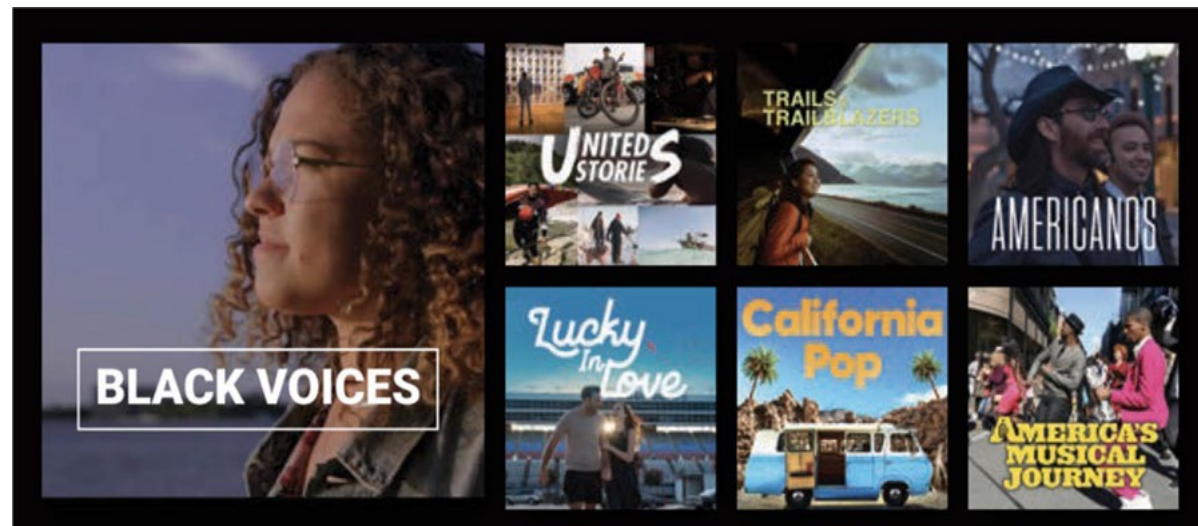
**Platforms Added in FY2023:**

MX Player &amp; Rlaxx

Samsung TV Plus Nordics - LG Nordics

**Total Reach:**

804M+ across all platforms





**+10%**

MoM Avg Growth  
*(March '22 – Feb '23)*

**+200%**

January '23 YoY

**+181%**

February '23 YoY

# Euronews: Soul of the South



## APPROACH:

Create a road trip video series showcasing the U.S. Civil Rights Trail sites and the influence within the communities today.



## PARTICIPATING PARTNERS:

- Sweet Home Alabama
- Visit Mississippi
- Tennessee Tourism
- Visit Music City
- Memphis Tourism



## RESULTS:

562M

TV impacts across U.K. & Europe

2:1

Program Value





# TSUSA State Partners – Our Collaborative Work Together



## APPROACH:

Develop customized marketing campaigns that fit TSUSA partners specific needs and objectives with the goal to increase international marketshare to the southeast region of the USA.



## COLLABORATING PARTNERS:

Kentucky Department of Tourism  
Louisiana Office of Tourism  
Sweet Home Alabama  
West Virginia Office of Tourism



## RESULTS:

**148%**

increase exposure with  
in-state stakeholders

**300M**

secured reach through  
Brand USA  
earned media

UNITED STORIES

# Discovering the soul of THE SOUTH

## Regional Inspirational Storytelling

Showcasing regional multi-state road trips and unique experiences across the southeast has been instrumental to bringing value to our Travel South partners.

### Small Town

RESULTS: Big Story

52

videos featuring TSUSA states

464

RESULTS:

39M+

Video views across  
Brand USA YouTube  
channels

Southern  
ROAD TRIP

And leveraging our multi-screen approach:







sorted

# Global Trade Initiatives

Continued engagement with the global travel trade allows us to broaden and deepen the USA product that's being sold internationally.

Our initiatives include:

- Brand USA Travel Week U.K. & Europe
- U.K. & Europe MegaFams 2022
- Strategic tour operator partnerships





TOURISM  
EXCHANGE  
USA



# How Are We Growing: FY2024 Evolution of our Regional Efforts

with Skylar Clark, Director of Partner Marketing



## How Are We Growing: FY2024 Evolution of Our Regional Efforts





Introducing

## 2023-2024 Explore the South: Optimized Audience Campaign

Brand USA's contributions to the regional program:


- Extends program reach and effectiveness
- Leverages Brand USA first-party audience and builds new audiences for Travel South
- Offers new impact reporting that has not been previously available

**Audience**



Audience

Brand USA's  
1<sup>st</sup> party data



Brand USA's  
1<sup>st</sup> party data

Enhance data with  
additional  
behavioral  
insights

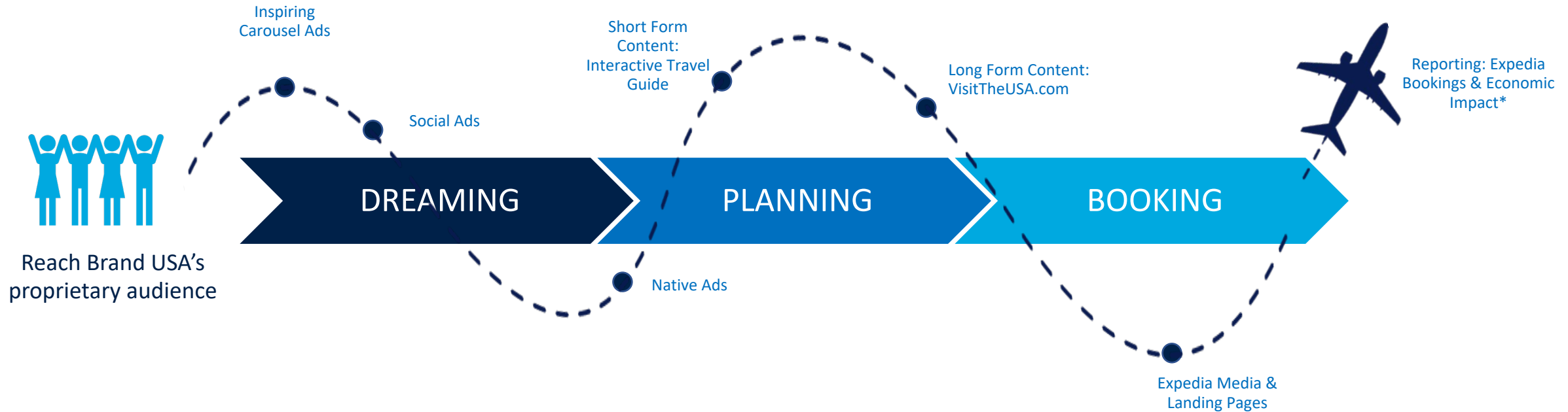
Brand USA's  
1<sup>st</sup> party data

Enhance data with  
additional  
behavioral  
insights

Monitor and  
measure  
performance

Optimized Audience Campaign

# Cohesive Consumer Journey



## Optimized Audience Campaign


Leveraging Brand USA's proprietary audiences to drive engagement and activation during key planning periods

\*Varies by level of inclusion

Optimized Audience Campaign

# Target Key Markets During Seasonal Planning Periods\*

Fall 2023:  
October – November



Canada

Deadline: July 2023



Winter 2024:  
January – February



U.K.

Deadline: August 2023

Spring 2024:  
March - April



Australia      Germany

Deadline: October 2023

\*Tentative dates; subject to change



Bringing Value to the Travel South USA region

# The Partner Engagement and Marketing Team

LEADERSHIP  
&  
STRATEGY



**Cassidy Bailey**



**Skylar Clark**



**Chris Ellis**

PARTNER  
REPRESENTATION



**Maya Hua**



**Dani Campana**



**Chelsea Sullivan Kaiser**

PARTNER SUPPORT



**Rianna Airitam**



**Tre Wilson**



THANK YOU!

## Consumer

VisitTheUSA



VisitTheUSA.com

## Travel industry

TheBrandUSA.com

