

The logo for Visit The USA, featuring the letters 'USA' in a white, pixelated font on a blue square background.

USA

VisitTheUSA.com

A vibrant tropical beach scene with palm trees on the left, turquoise water, and green hills in the background under a cloudy sky. The title text is overlaid in the center.

Shaping the Future of U.S. Inbound Tourism

October 2024

Brand USA



Aloha

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About Brand USA



**BRAND USA WORKS TO INCREASE
INTERNATIONAL VISITATION TO THE
UNITED STATES IN ORDER TO FUEL THE
U.S. ECONOMY AND ENHANCE THE IMAGE
OF THE UNITED STATES WORLDWIDE.**



BRAND USA FUNDING MODEL

and the Electronic System For Travel Authorization (ESTA)



Traveler applies for a travel authorization (ESTA) on the Department of Homeland Security website at:

esta.cbp.dhs.gov/esta

The **\$21** Fee is paid to the Department of Homeland Security.

The ESTA is valid for multiple trips to the USA for two years.



\$4 covers administrative cost for the U.S. Department of Homeland Security



\$17 is held in the Travel Promotion Fund in the U.S. Treasury

For every \$1 Brand USA raises in cash and in-kind contributions, Brand USA is eligible to receive \$1 from the Travel Promotion Fund (up to a max. of \$100M annually).

100M Contributors + **100M** Travel Promotion Fund



PROMOTION

U.S.
Travel &
Tourism

U.S. TRAVEL
ASSOCIATION®

ADVOCACY



POLICY

U.S.-JAPAN TOURISM YEAR



Brand USA Economic Impact



Over the past 11 years (FY13 – FY23), Brand USA's marketing efforts have generated:

8.7 MILLION incremental visitors



\$28.8 BILLION incremental spending



Over 36,800 incremental jobs
on average supported each year



\$8.3 BILLION in federal, state, and local taxes



Nearly \$63 BILLION in total economic impact

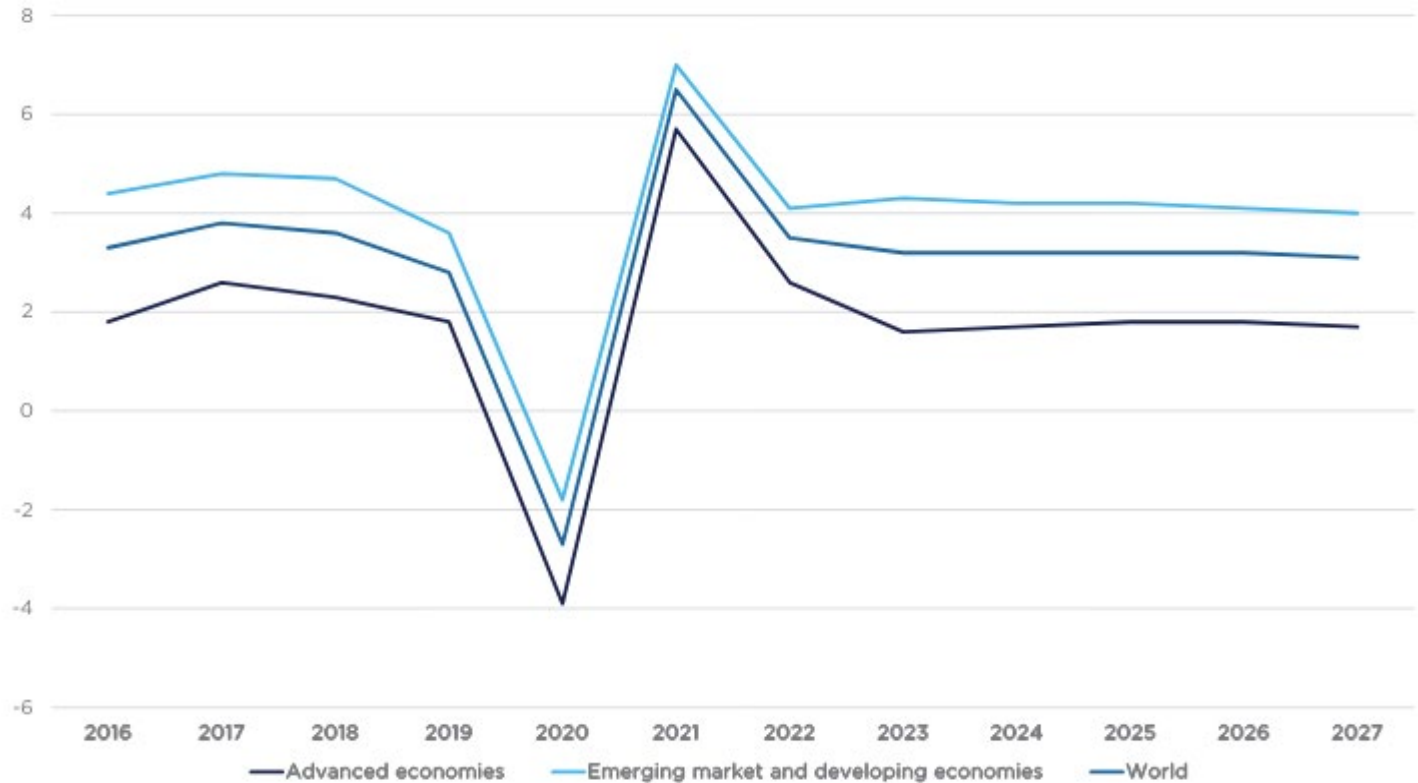
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Global Outlook



Global Economic Outlook

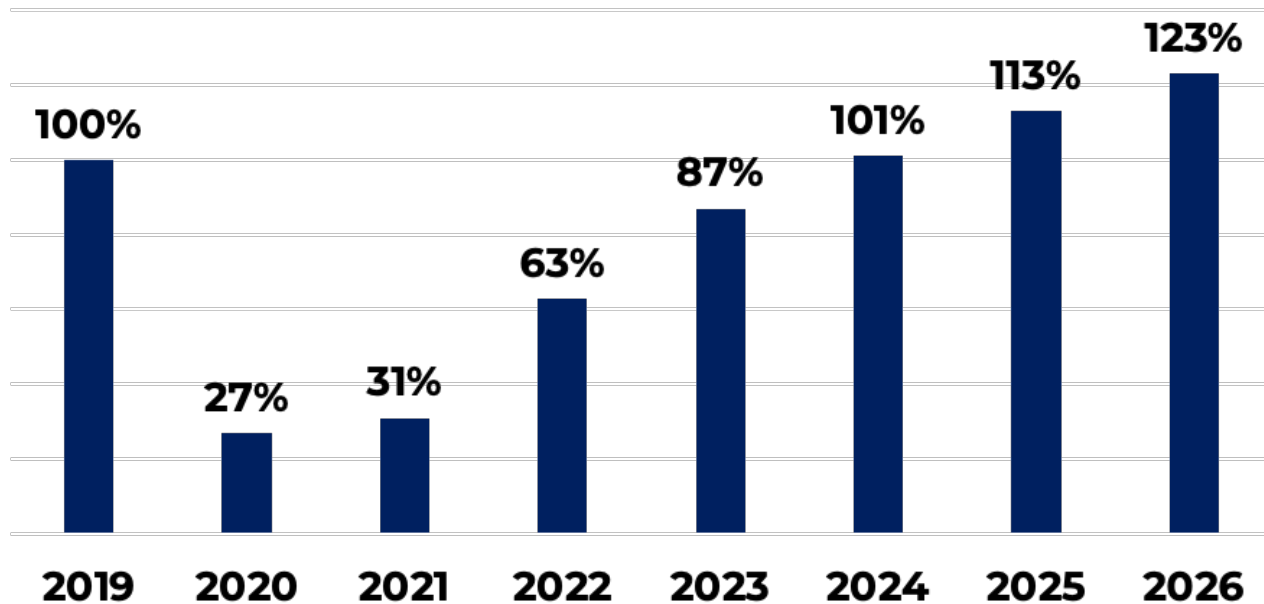
REAL GDP GROWTH (Annual % change)



Global International Travel

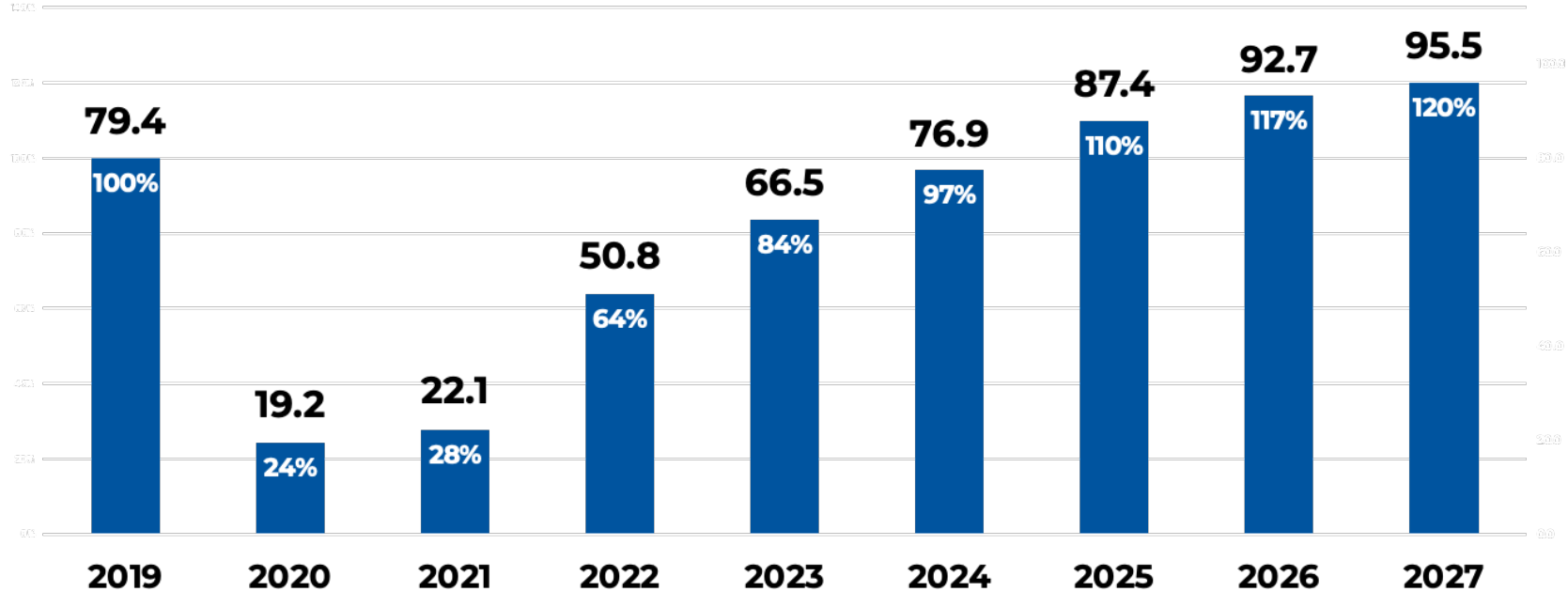
% relative to 2019 levels

Global Tourism Landscape



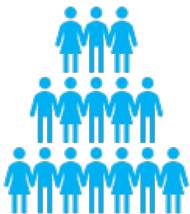
U.S. Inbound Travel Forecast: Visitation to surpass pre-pandemic levels in 2025

Visitation in millions % relative to 2019 levels



2023 Hawai'i International

Visitation and Spend



7th in U.S.



4th in U.S.



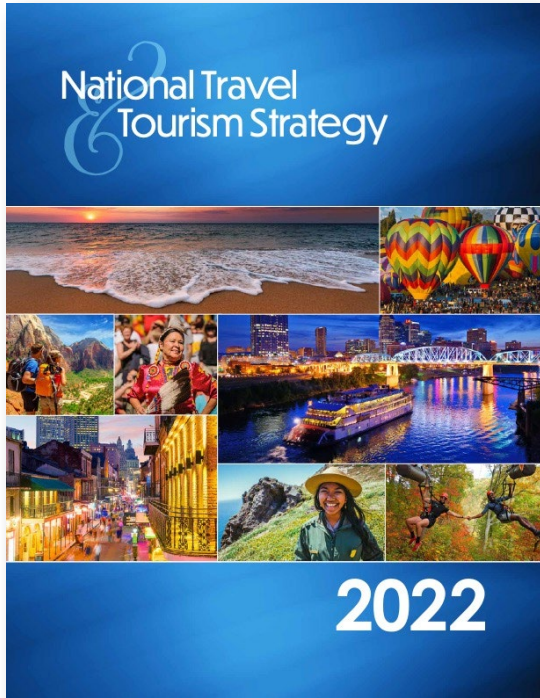
Impact of Top 12 Markets

80% of visitation comes from:

- Canada
- Mexico
- United Kingdom
- Germany
- India
- Brazil
- South Korea
- France
- Japan
- China
- Italy
- Australia



NATIONAL TRAVEL & TOURISM STRATEGY



Focuses federal efforts to support travel and tourism in the U.S.

Establishes a five-year goal of attracting

90 million visitors, who will spend **\$279 billion** annually

Envisions private and public sectors working together to increase the value and volume of tourism

U.S. REMAINS THE WORLD'S MOST POWERFUL TRAVEL & TOURISM MARKET



2024 Economic Impact Trends Report,
World Travel & Tourism Council

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Industry Economic Impact



2024 Year-to-Date U.S. Travel and Tourism Spending

\$147B

YTD (JAN-JULY)

+16%

YTD (JAN-JULY)

\$649M

SPENT PER DAY



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Consumer Trends



HAWAI'I INTERNATIONAL VISITATION TRENDS



SIGHTSEEING | 92%



SHOPPING | 86%



NATIONAL PARKS | 34%



GUIDED TOURS | 31%



WATER SPORTS | 26%



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Marketing Strategies



FY25 TARGET MARKETS

North America

Canada
Mexico

Latin America

Brazil
Colombia

Europe

Benelux
(Belgium, Netherlands, Luxembourg)
German-speaking region
(Germany, Switzerland, Austria)
France
Ireland
Italy
The Nordics
(Denmark, Norway, Sweden, Finland, Iceland)
Spain
United Kingdom

Asia & Oceania

Australia & New Zealand
China
India
Japan
Southeast Asia
South Korea

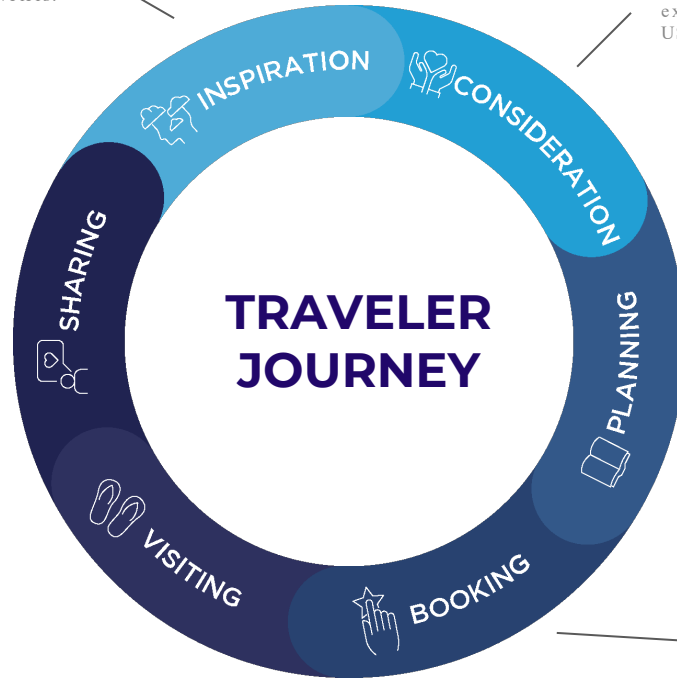
STRATEGIC MARKETING FRAMEWORK

Inspire with a Variety of Distinctive Possibilities

Showcase the freedom and transformative, distinctive experiences only the USA can offer travelers.

Educate with Targeted & Individualized Experiences

Create confidence by connecting travelers with destinations and experiences so they can personalize their USA trip based on what they love.



Simplify Planning

Help travelers make the most of their visit by sharing valuable resources to aid in their active decision-making process.

Convert Travelers with Urgency & Seamless Integrations

Drive urgency to book now through our partners.

A man and a woman are smiling and looking at each other in a field. In the background, several hot air balloons are visible against a clear sky. The man is wearing a dark shirt, and the woman is wearing a light-colored, ribbed sweater. They appear to be in a joyful and romantic moment.

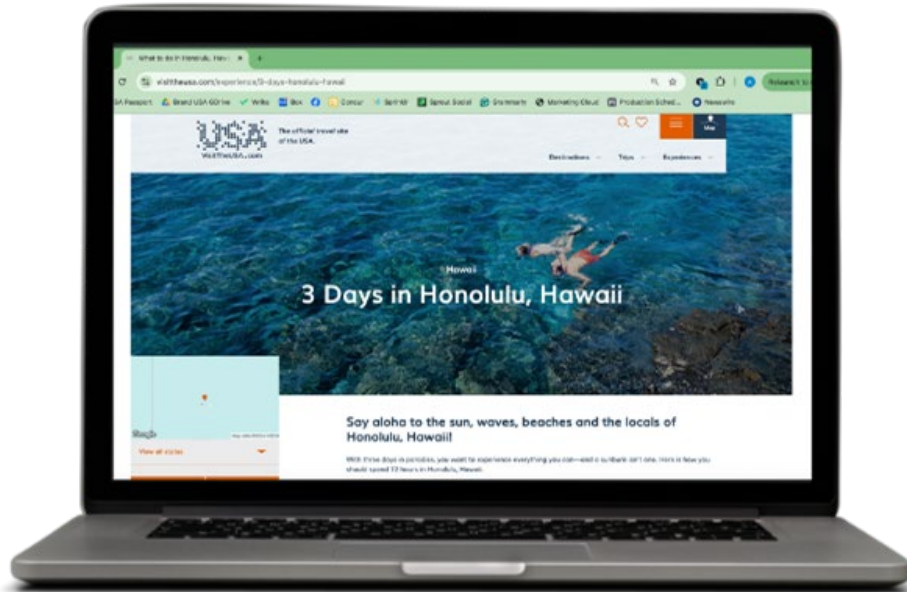
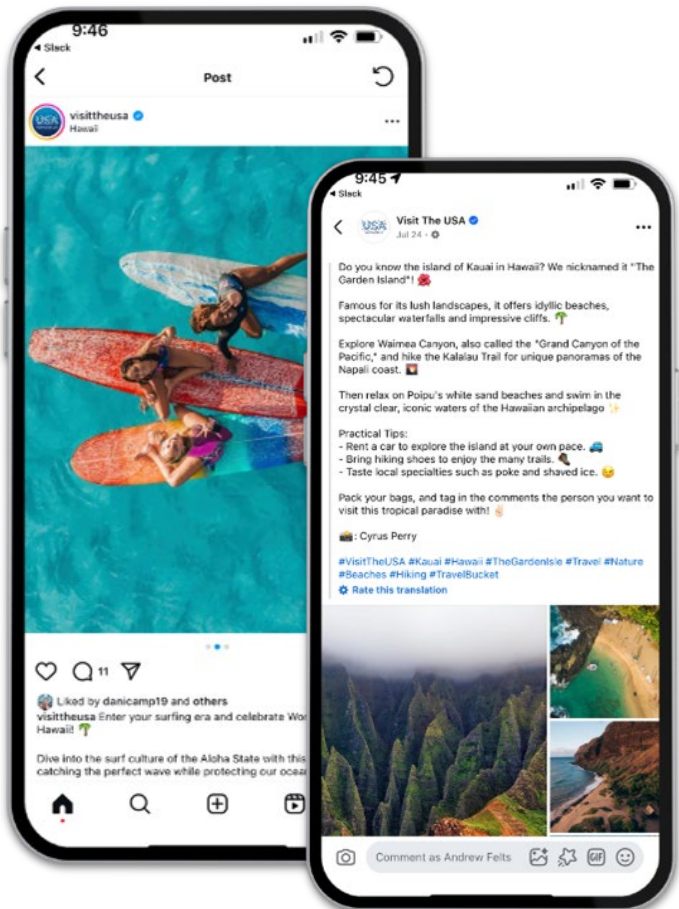
Experience it all.

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 US has to offer.

Our campaign emphasizes that a trip to the US 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.



INSPIRATION AND CONSIDERATION





PLANNING AND BOOKING



USA
VisitTheUSA.com

Brand USA

ROAD TRIPS
USA

USA Itineraries

As your official guide, we'll show you a diverse range of unique experiences that are all within your reach.

ISLAND DISCOVERY SERIES

HAWAIIAN ISLANDS

USA
Brand USA

ROAD TRIPS
USA

ISLAND DISCOVERY: HAWAIIAN ISLANDS

LANAI, HAWAII

Day 13 to 15

Nine miles from Maui, Lanai is the smallest inhabited island in Hawaii. Find a cornucopia of experiences, from luxury accommodations and world-class golf to horseback riding, back country off-road adventures, spinning limestones, lush rain forests and spectacular nature preserves. This small island is as diverse as it is beautiful.

Accommodation: Lanai

MOLOKAI, HAWAII

Day 16 to 18

This is Hawaii in its truest form, from the 2,000-foot cliffs to the white-sand beaches, Molokai is still true to its Hawaiian roots. The island is a haven for outdoors enthusiasts who are looking to escape to a piece of the earth unspoiled by civilization.

Accommodation: Molokai

PARTNERING WITH HAWAI'I TOURISM AUTHORITY





USA HOUSE THE STATES OF AMERICA

SOV

Brand USA Marketing Partnership Opportunities

Tuesday | 10:15 a.m. | Room 311



MAYA HUA
Senior Manager,
Partner Engagement



SUZY SHEPARD
Director,
Global Trade (APAC)

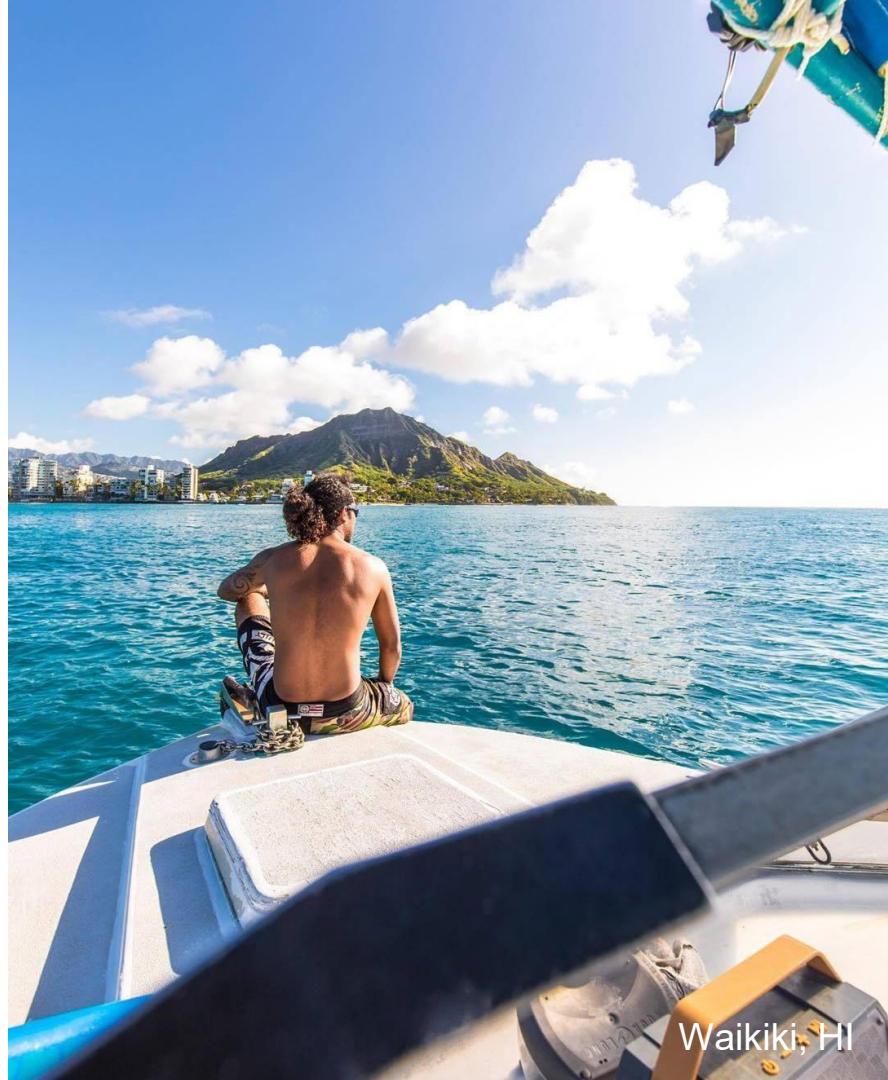
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What's
Ahead?



FUTURE OPPORTUNITIES

- INNOVATION / AI
- MEETINGS, INCENTIVES, CONVENTIONS, EVENTS
- GLOBAL PR
- TRAVEL BEYOND THE GATEWAYS



Brand USA

A vibrant sunset scene over a rocky coastline. The sun is low on the horizon, casting a golden glow across the sky and reflecting on the turquoise ocean. Large, dark rocks in the foreground are covered in bright green moss. Waves are crashing against the rocks, creating white foam. The sky is filled with dramatic, dark clouds, and the overall atmosphere is serene and majestic.

Mahalo



THANK YOU

CONNECT WITH US

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 [TheBrandUSA.com](https://www.TheBrandUSA.com)