

Lake Tahoe, Nevada

BRAND USA INTERNATIONAL MARKET OUTLOOK

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USA
VisitTheUSA.com

Brand USA



USA

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Brand USA

INTERNATIONAL VISITATION
MORE IMPORTANT THAN EVER BEFORE

International
Inbound
Snapshot
—
2023



67M

INTERNATIONAL VISITORS TO THE USA

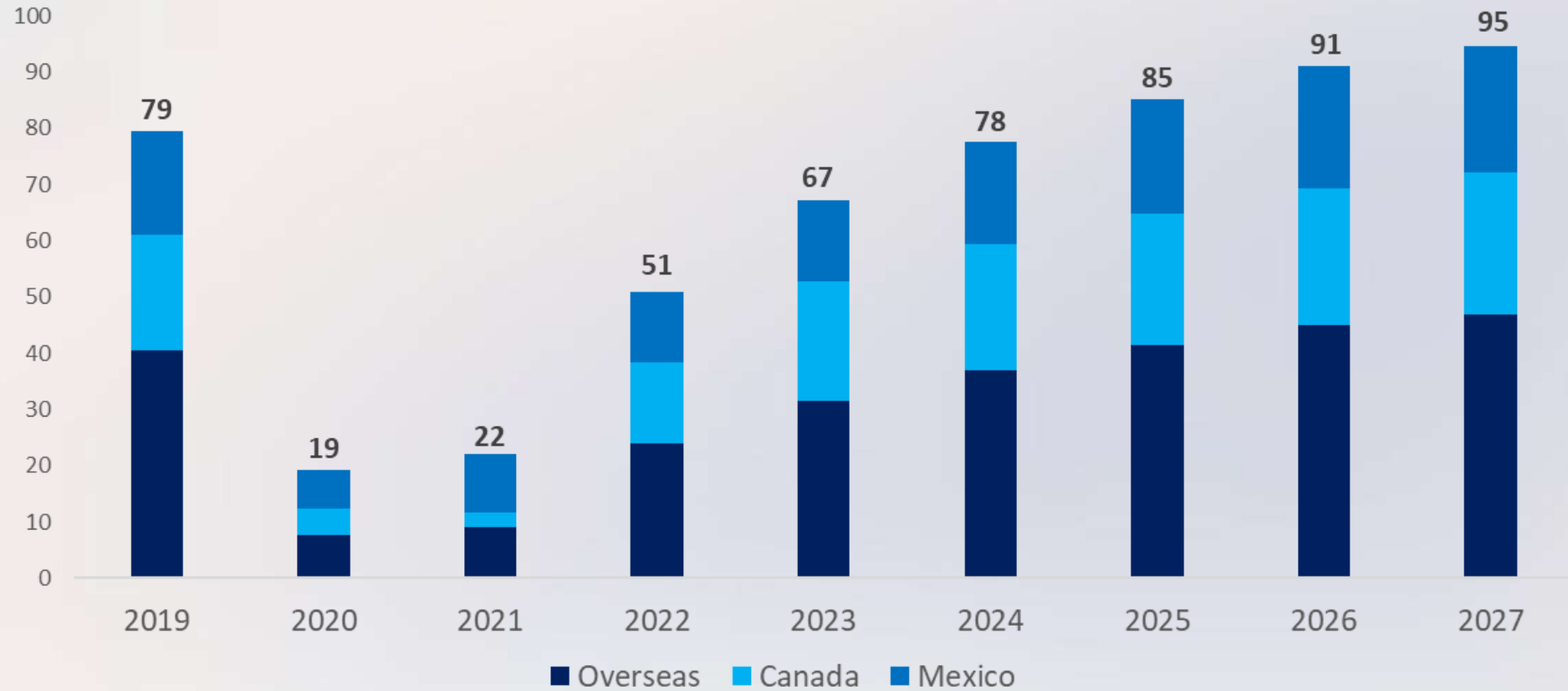
\$193B

SPENT ON TRAVEL TO & WITHIN THE USA

Source: ITA and NTTO, February 2024

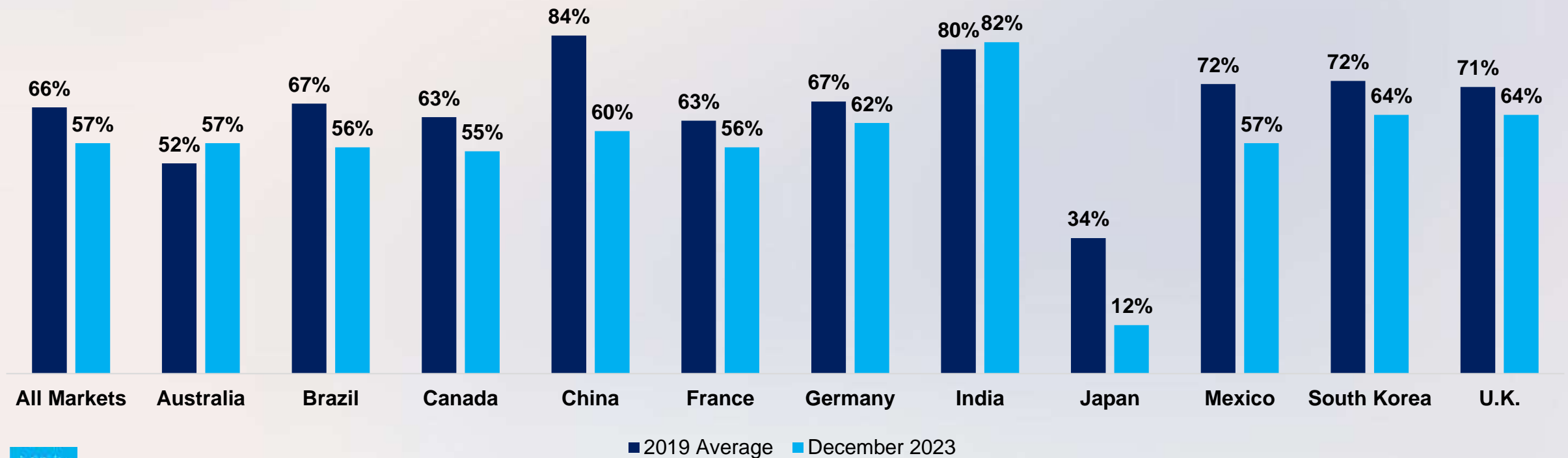
USA Inbound Travel

The USA will surpass pre-pandemic visitation in 2025



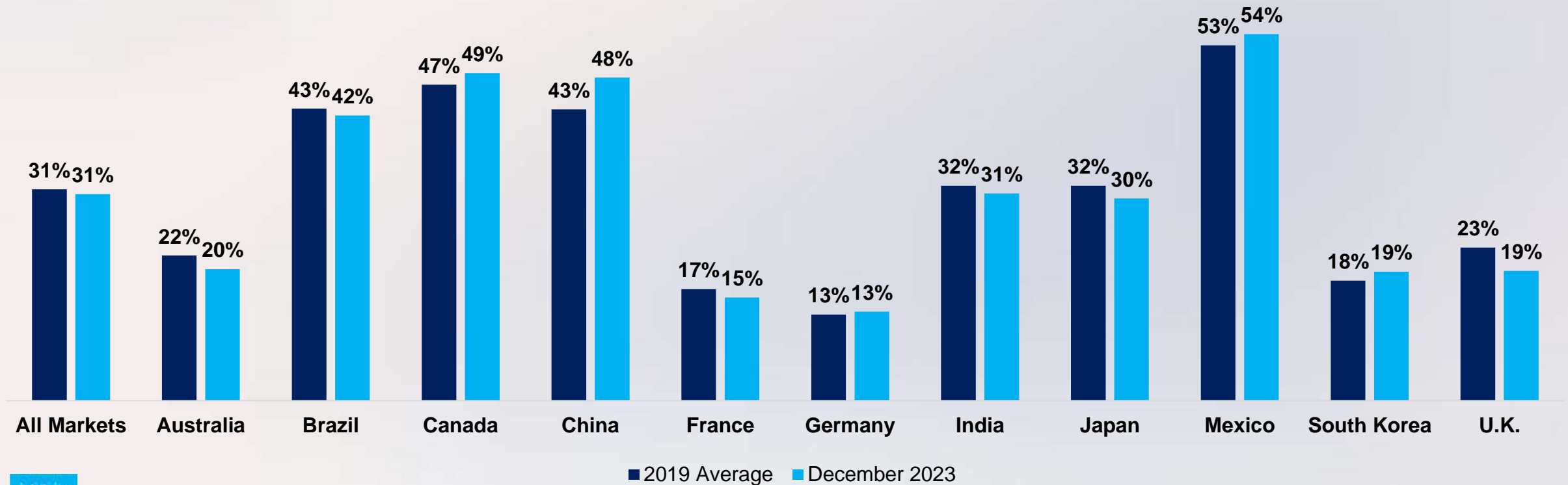
Likelihood to Travel Internationally

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

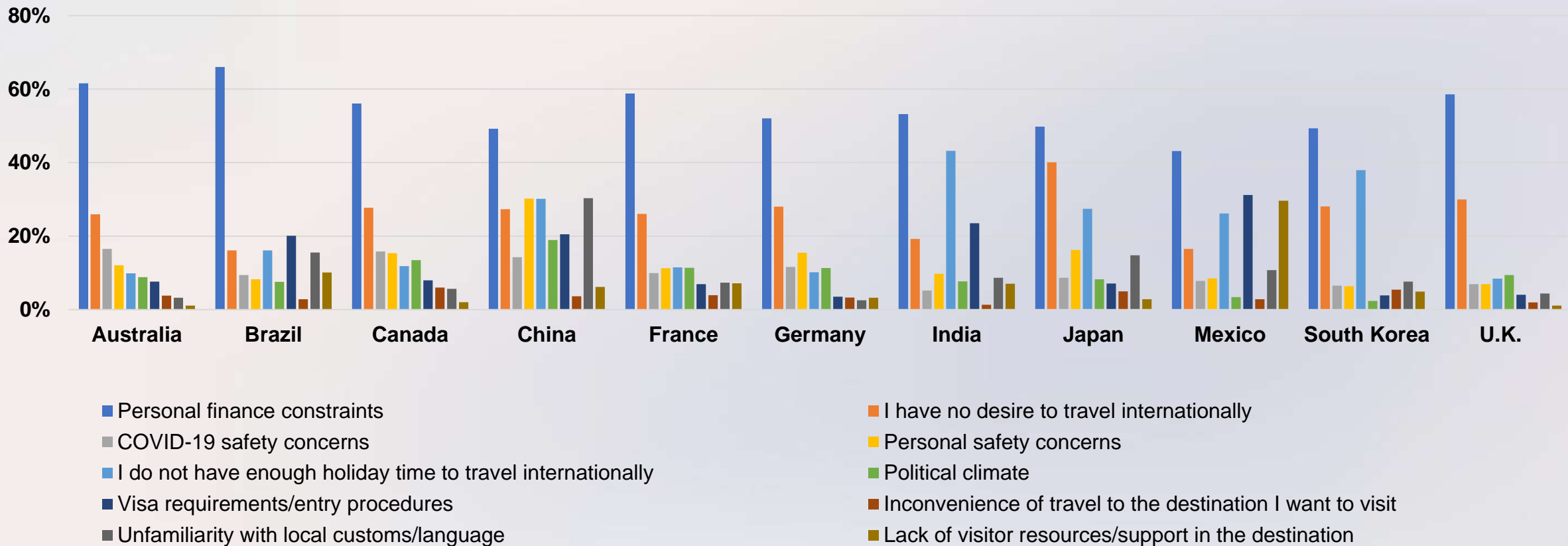


Likelihood to Travel to the USA

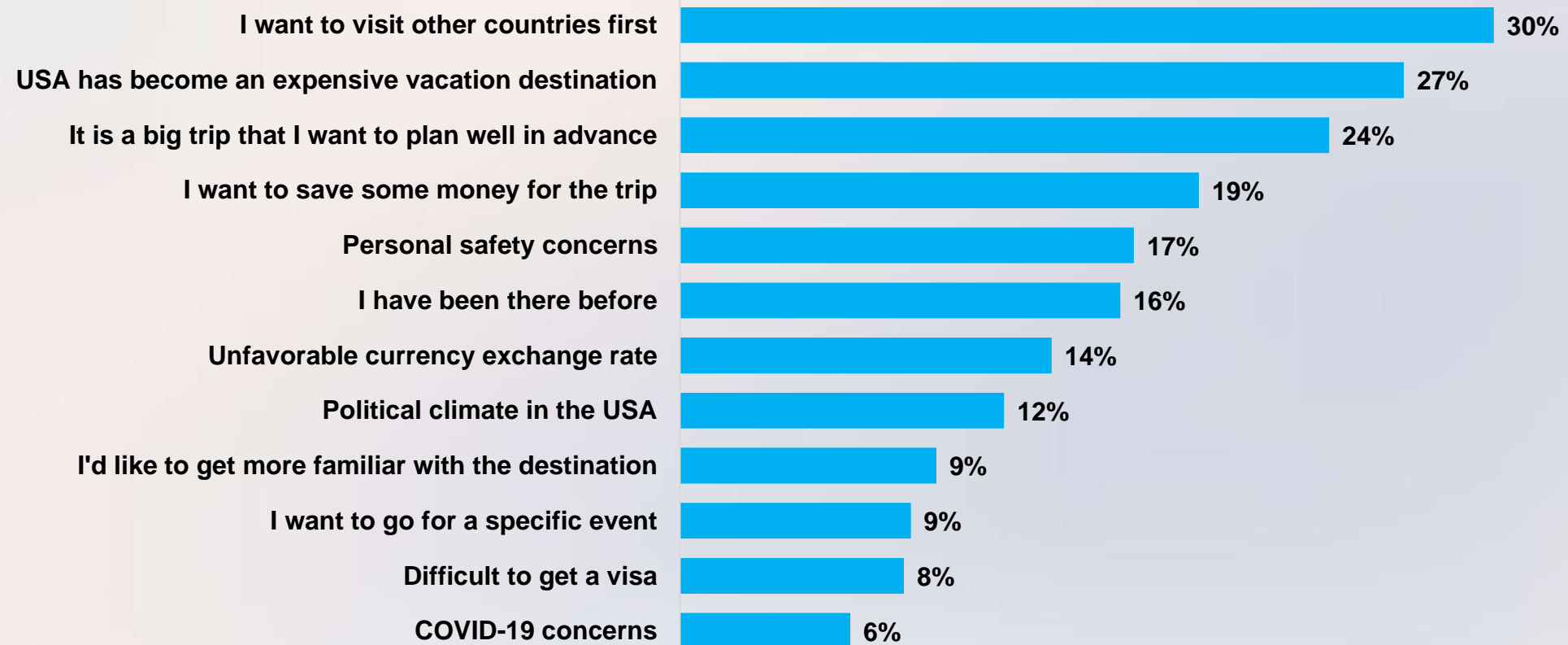
Very or Somewhat *Likely to Visit the USA* in the Next 12 Months



Reasons for Not Traveling Internationally in the Next 12 Months



Reasons for Not Traveling to the USA in the Next 12 Months



When asked "what country will you visit on your international holiday," the USA Ranked:

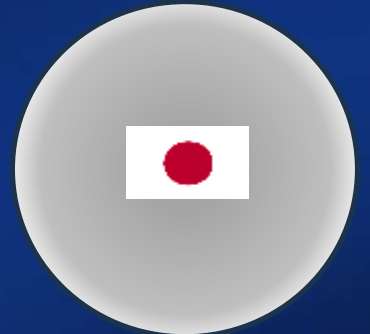
#1: Canada, Mexico, China, Brazil

#2: Japan

#3: South Korea, Australia, India

#4: U.K.

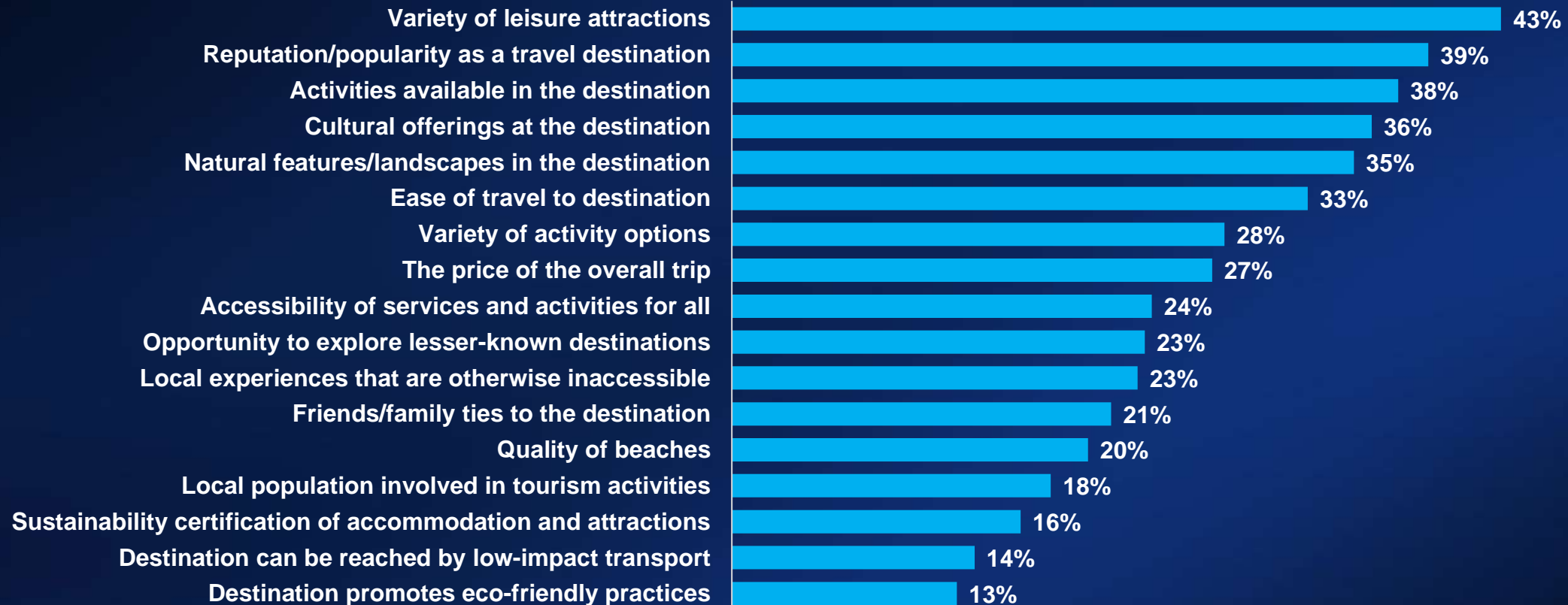
#5: France, Germany



Characteristics of the USA



What is your perception of the United States as a travel destination?





MARKETING THE USA

Reno, Nevada

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.

Post-COVID International Travel Trends



- Travel is integral to our wellbeing



- Maximize experiences in one trip



- Localization with intention

FY2024 BRAND USA MARKETING OBJECTIVES

- Strengthen the brand presence of the USA as a travel destination.
- Improve brand perception of the USA as a travel destination.
- Grow U.S. market share.
- Disperse travelers to multiple destinations across the USA.
- Increase traveler spend.
- Increase visitation and frequency of visits.

FY2024 Target Markets

North America

Canada
Mexico

Latin America

Argentina
Ecuador
Peru
Chile
Colombia
Brazil

Europe

United Kingdom
Ireland

Germany
(Switzerland, Austria)

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

Authentic, Compelling Storytelling

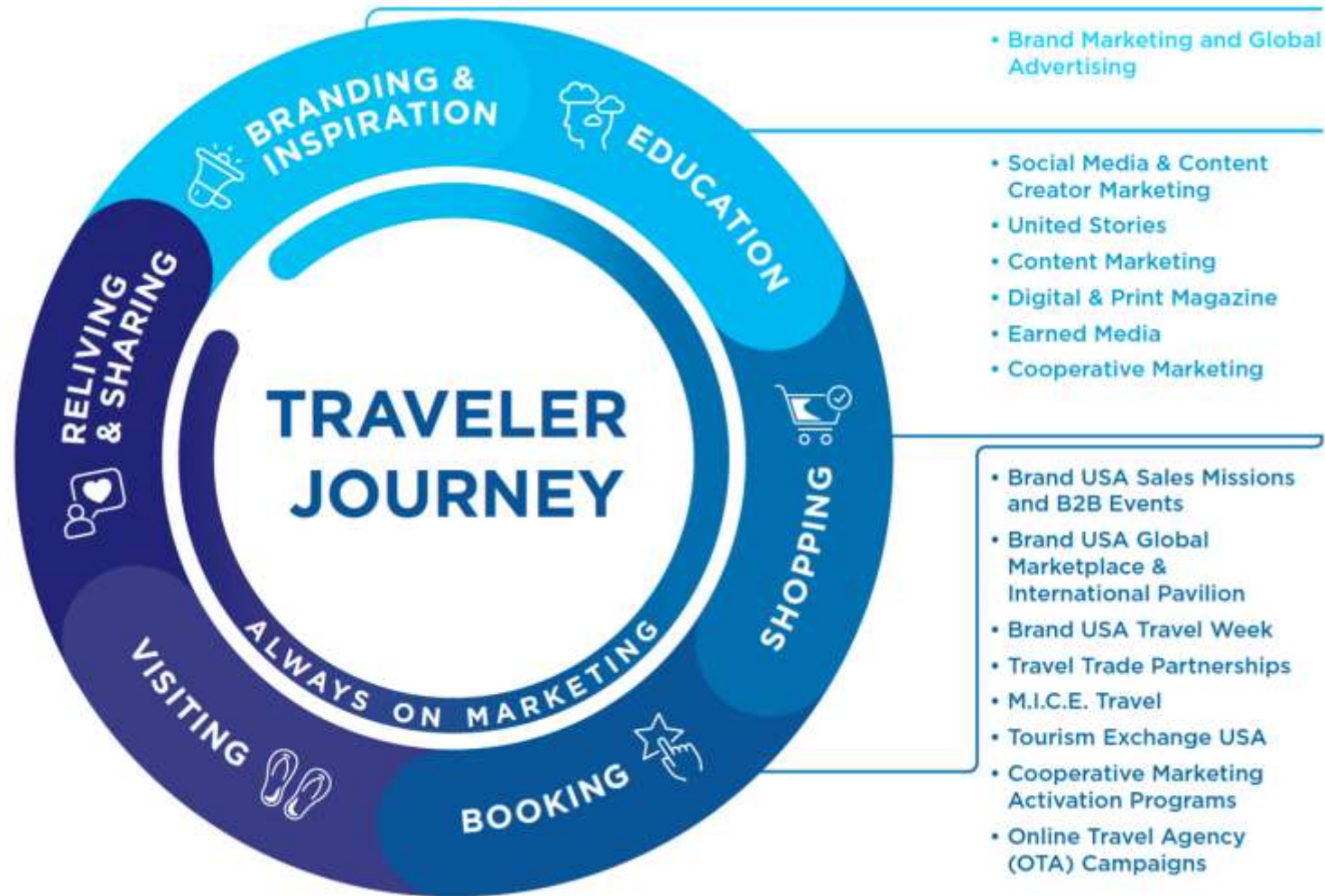


Lake Tahoe, California

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

Anchorage, Alaska

Brand USA Marketing Initiatives



A man and a woman are embracing in a warm, intimate moment. The man is on the right, leaning towards the woman on the left. They are both smiling and looking down at each other. The background is a soft, hazy sunset with several hot air balloons floating in the sky. The overall mood is romantic and adventurous.

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 bottom half shows a wide, sandy beach with numerous palm trees. The shadows of the palm trees are cast long and dark on the sand. The text "More than beaches," is overlaid in the center of the image, in a white, sans-serif font.

More than beaches,

TRADE ACTIVITY

—
MegaFams

Roadshows

Sales Missions

Tradeshows

Webinars



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



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



USA

VisitTheUSA.com

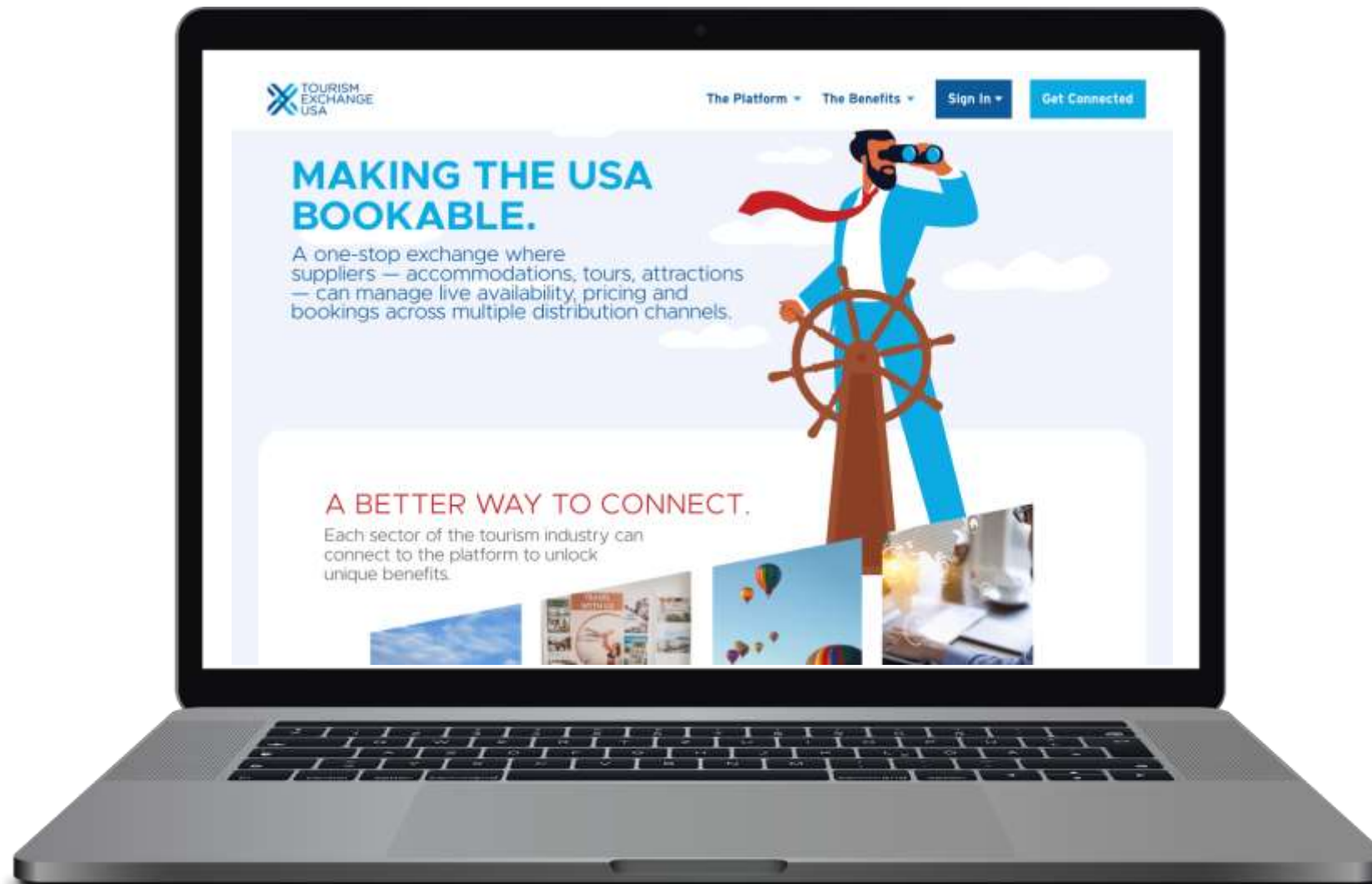
Brand USA

LEADING WITH OPPORTUNITY



Tourism Exchange USA

Powered by Brand USA





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



Lake Tahoe, California

Thank You



CONSUMER

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TRAVEL INDUSTRY

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