



USA

VisitTheUSA.com

Brand USA

International Travel & Consumer Sentiment

June 30, 2021

Introducing



Julie Heizer

Deputy Director

National Travel & Tourism Office

U.S. Department of Commerce

Introducing



Rosina Barbastefano

Director, Consumer Research

Brand USA

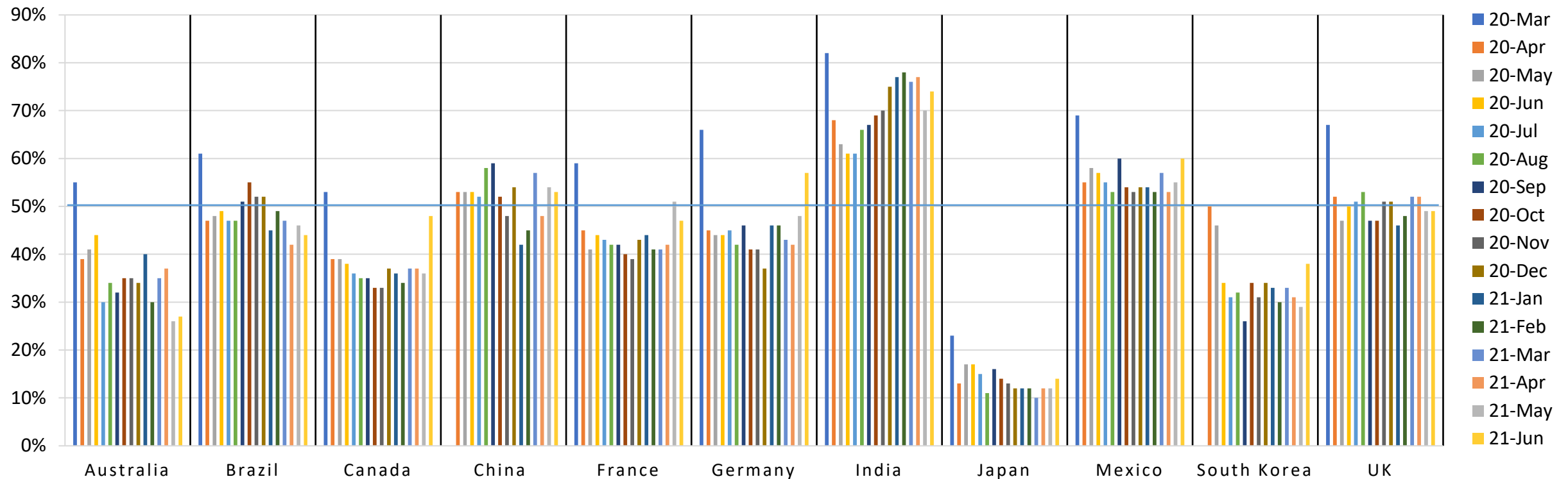
The Big Picture

- Intent to travel international and intent to travel to the US not only varies by market but by demographics
- Intent to travel to the US has not declined as much as intent to travel internationally in general



Likelihood to Travel Internationally in the Next 12 months

Risk tolerance: Some markets are more risk tolerant than others



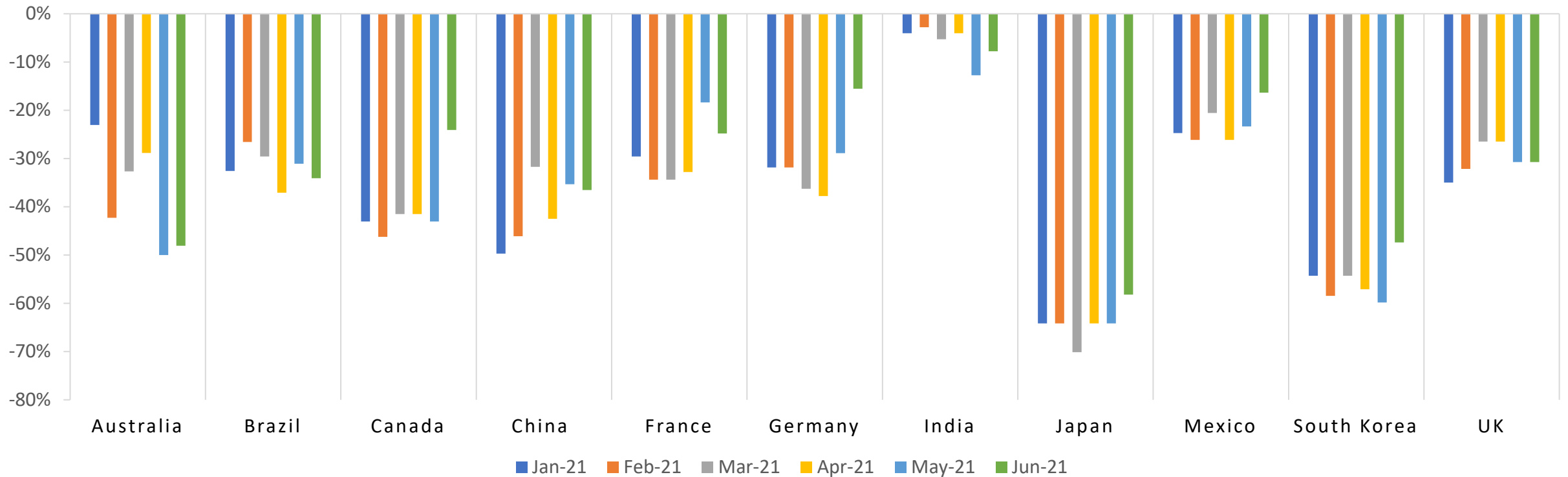
Base: All respondents

Source: Brand USA/Engine, custom study

Likelihood to Travel Internationally in the Next 12 months

(% Change over 2019 average)

Intent to travel is certainly not close to 2019 levels yet, but seeing improvements

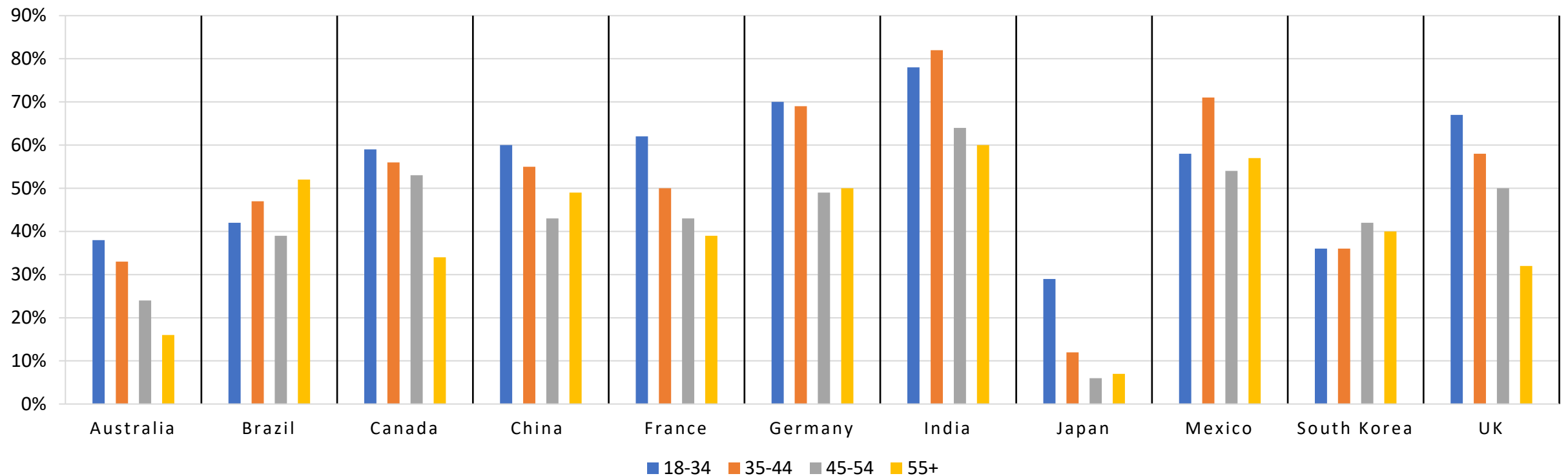


Base: All respondents

Source: Brand USA/Engine, custom study

Likelihood to Travel Internationally in the Next 12 months by Age group (June 2021)

Younger generations have the strongest international travel intent in the majority of markets

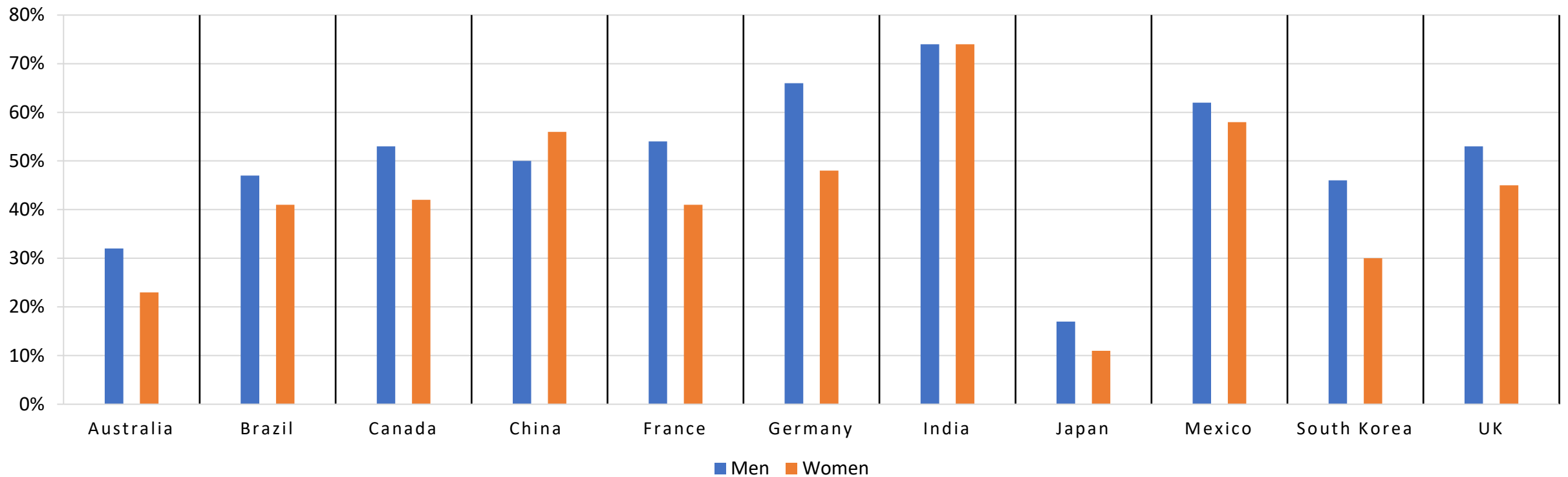


Base: All respondents

Source: Brand USA/Engine, custom study

Likelihood to Travel Internationally in the Next 12 months by Gender (June 2021)

Men have a stronger intent to travel internationally than women in a majority of markets

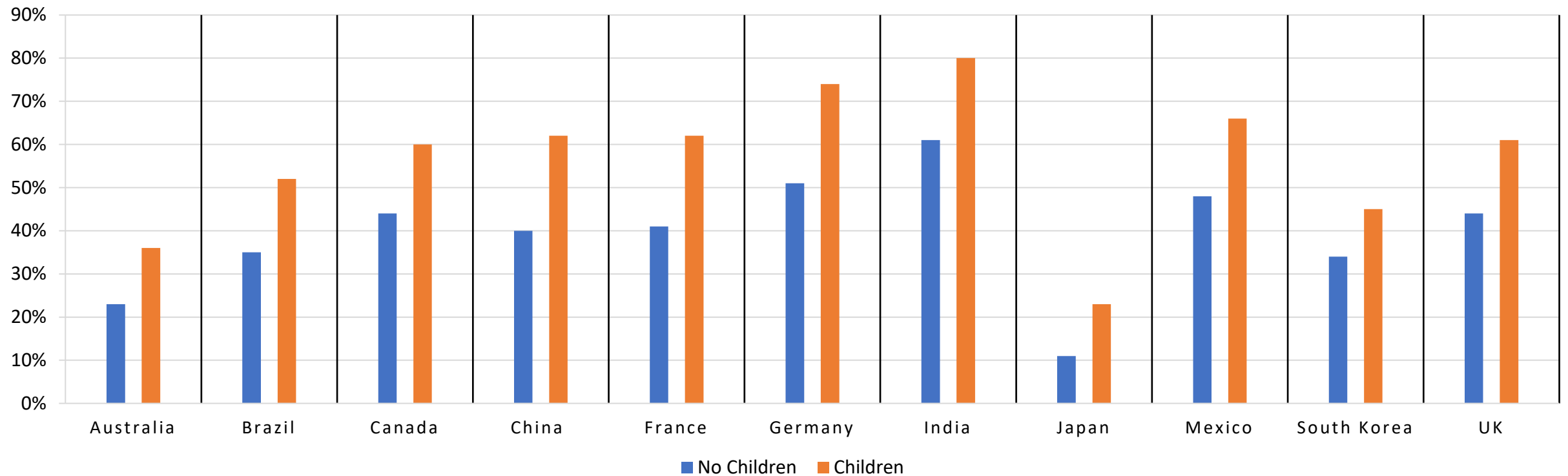


Base: All respondents

Source: Brand USA/Engine, custom study

Likelihood to Travel Internationally in the Next 12 months by Children in Household (June 2021)

Families with children have a stronger intent to travel than those families with no children



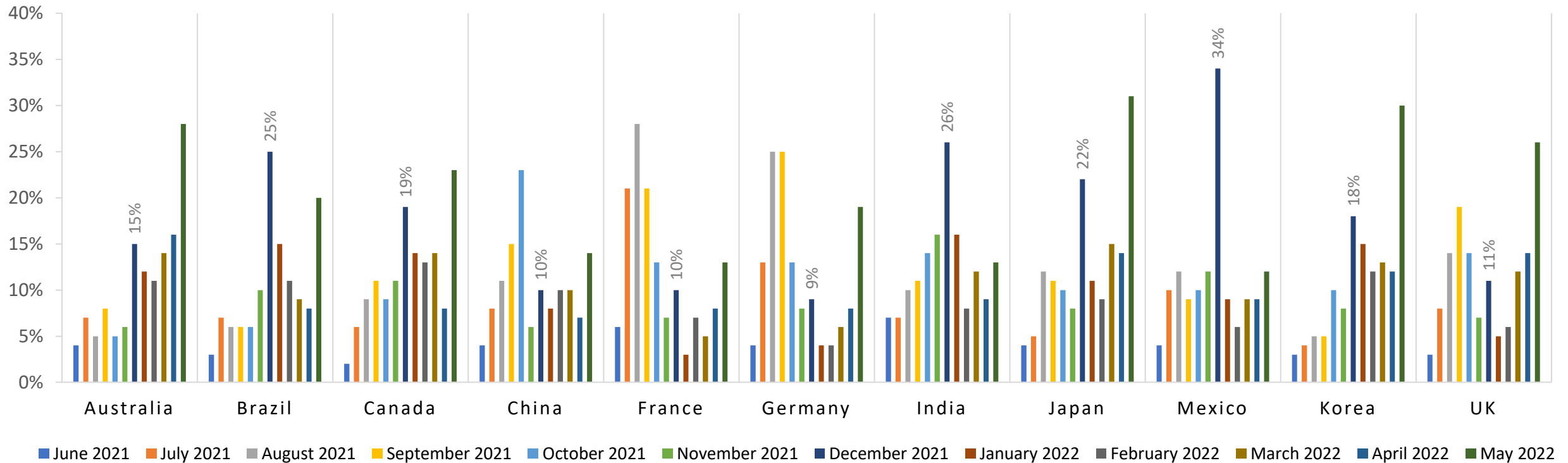
Base: All respondents

Source: Brand USA/Engine, custom study

International Trip Departure: Next 12 months

(June 2021)

Expecting strong holiday travel from Brazil, Canada, Germany, Japan, India and Mexico



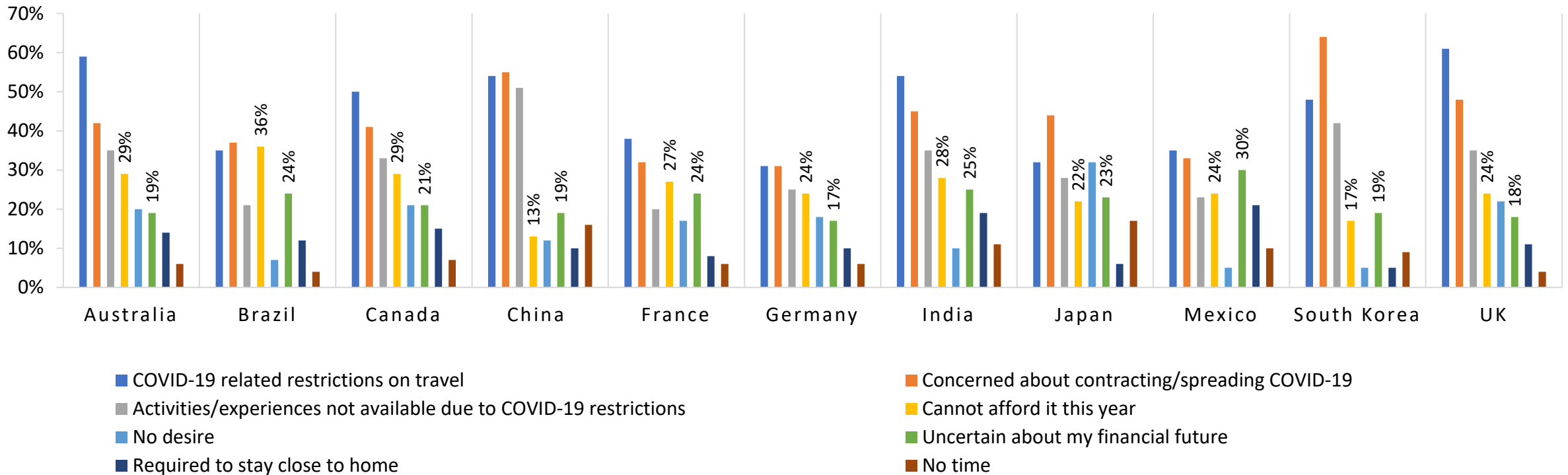
Base: Respondents who are likely to take an international trip in the next 12 months

Source: Brand USA/Engine, custom study

Reasons for Not Traveling Internationally in the Next 12 months

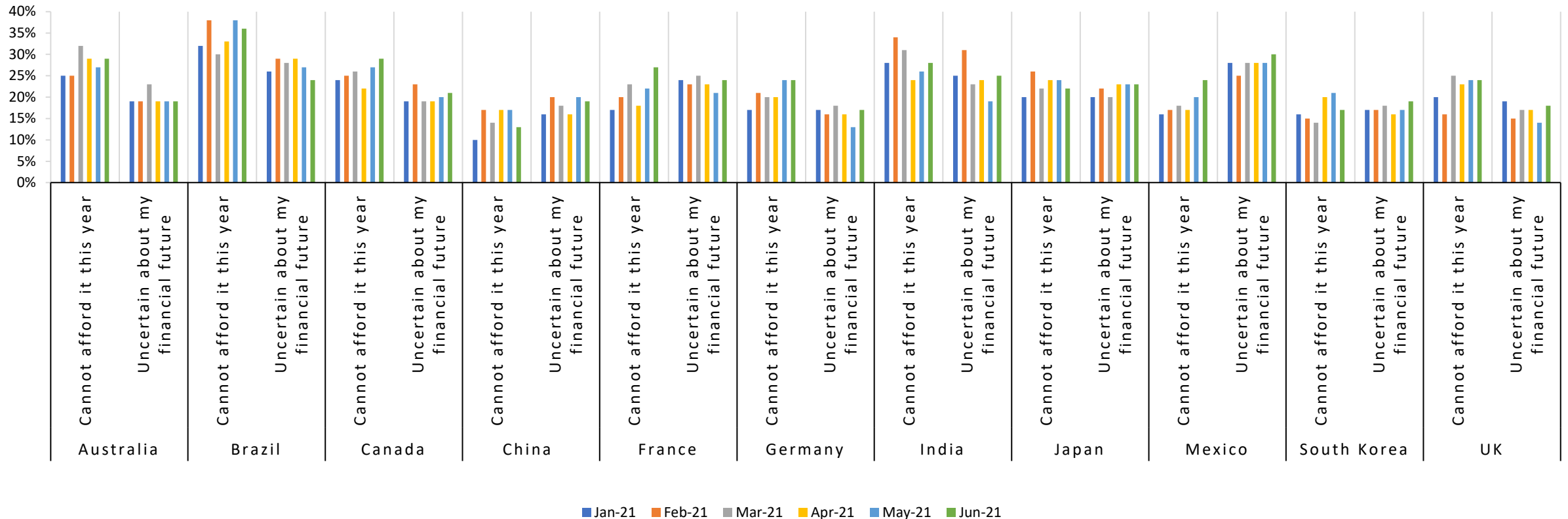
(June 2021)

Reasons for not traveling internationally are still heavily Covid-19 related, but seeing some uptick on financial reasons



Financial Reasons for Not Traveling Internationally in the Next 12 months

Small increase in people saying they cannot afford an international trip in the next 12 months

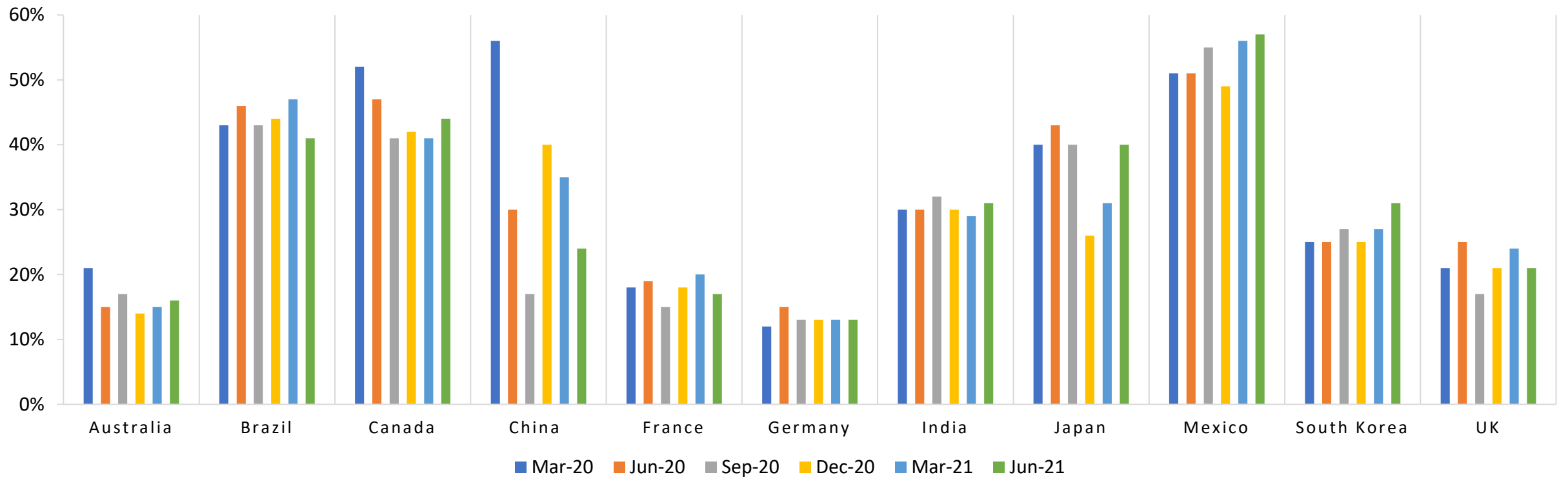


Base: Respondents who are unsure/unlikely to take an international trip in the next 12 months

Source: Brand USA/Engine, custom study

Likelihood to Travel to the USA in the Next 12 months

Uptick on intent to travel to the U.S. in Canada, Japan, Mexico, India and South Korea



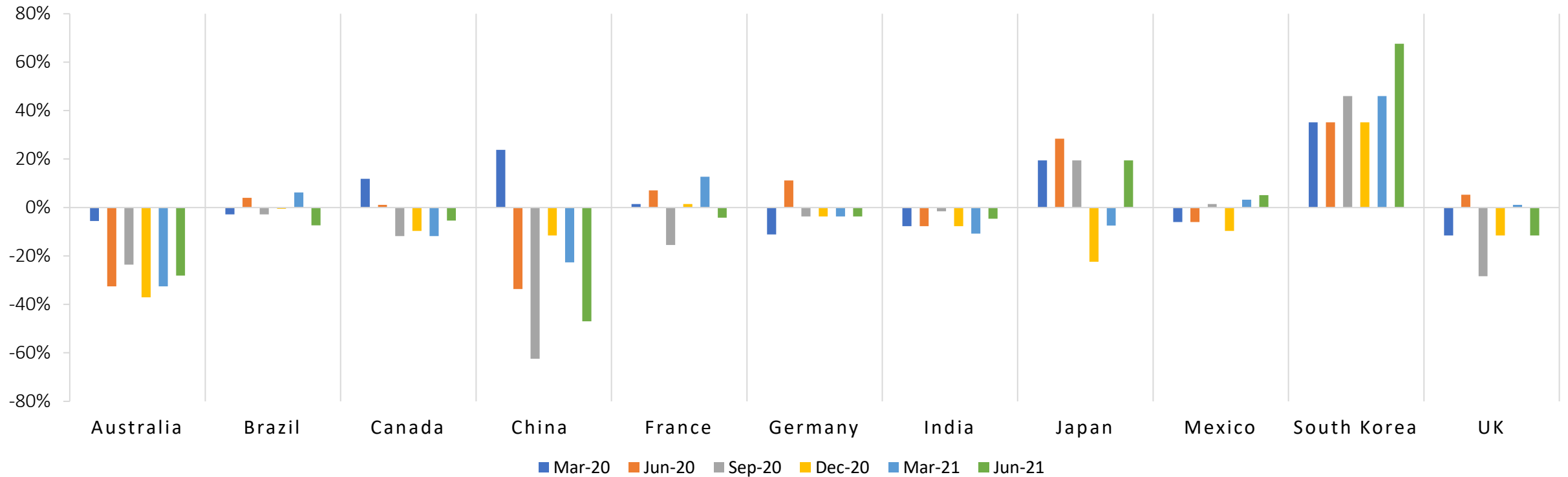
Base: Respondents who are likely to take an international trip in the next 12 months to the USA

Source: Brand USA/Engine, custom study

Likelihood to Travel to the USA in the Next 12 months

(% Change over 2019 average)

Not too far from 2019 levels in majority of the markets, except Australia and China



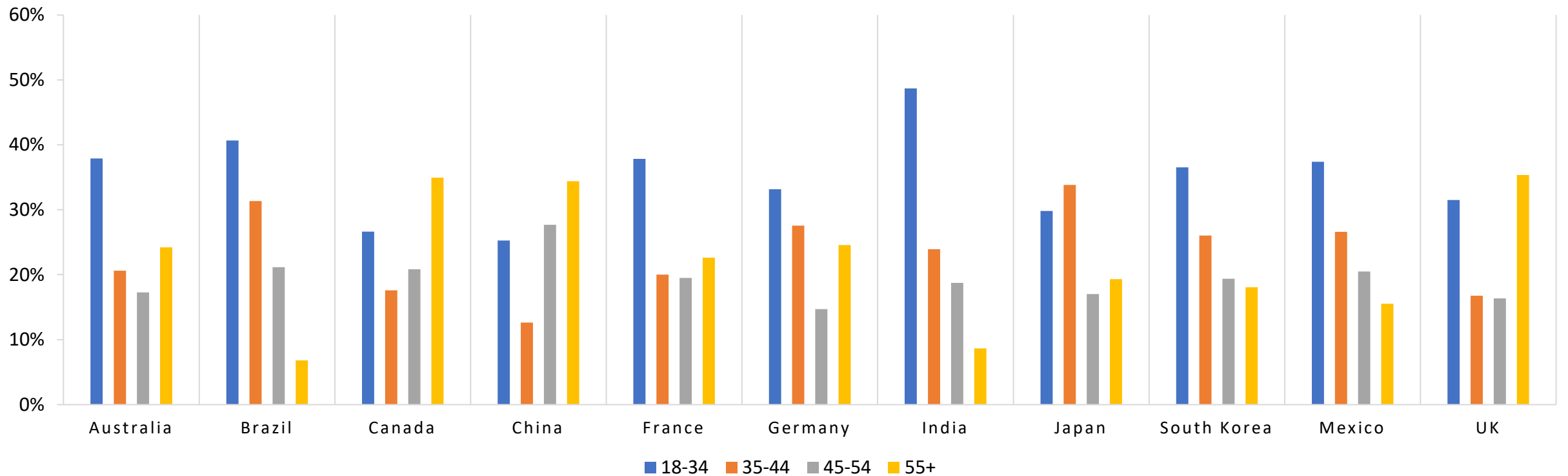
Base: Respondents who are likely to take an international trip in the next 12 months to the USA

Source: Brand USA/Engine, custom study

Likelihood to Travel to the USA in the Next 12 months By Age

(June 2021)

Intent to travel to the US does not skew to the younger generations

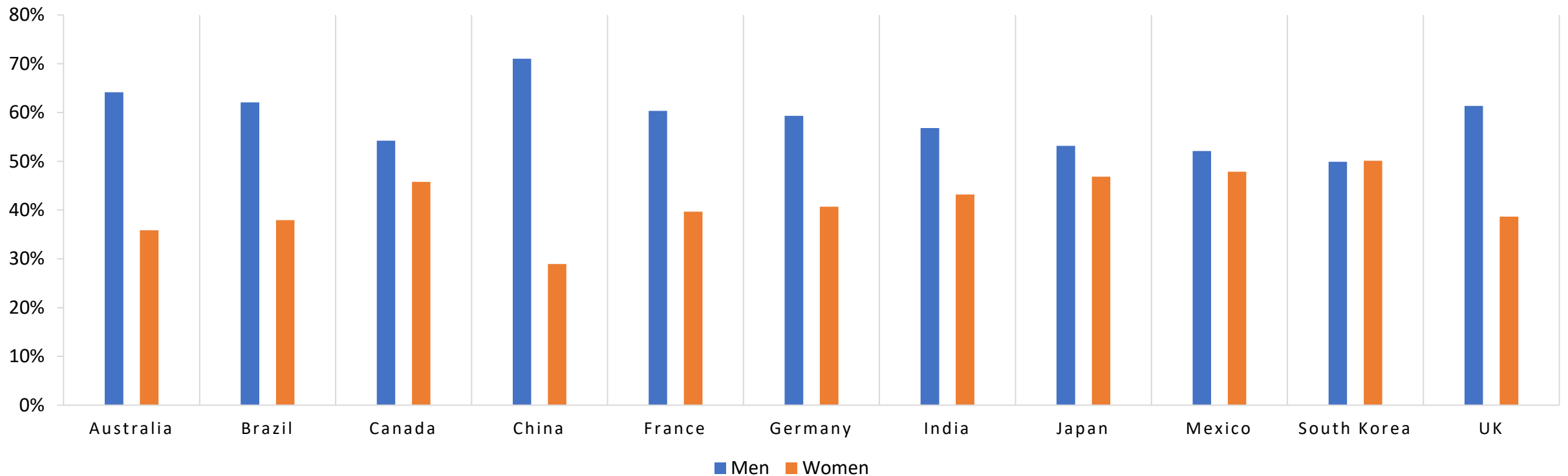


Base: Respondents who are likely to take an international trip in the next 12 months to the USA

Source: Brand USA/Engine, custom study

Likelihood to Travel to the USA in the Next 12 months By Gender (June 2021)

Same as intent to travel internationally in the next 12 months, men have a much stronger intent to travel to the US in the next 12 months than women do

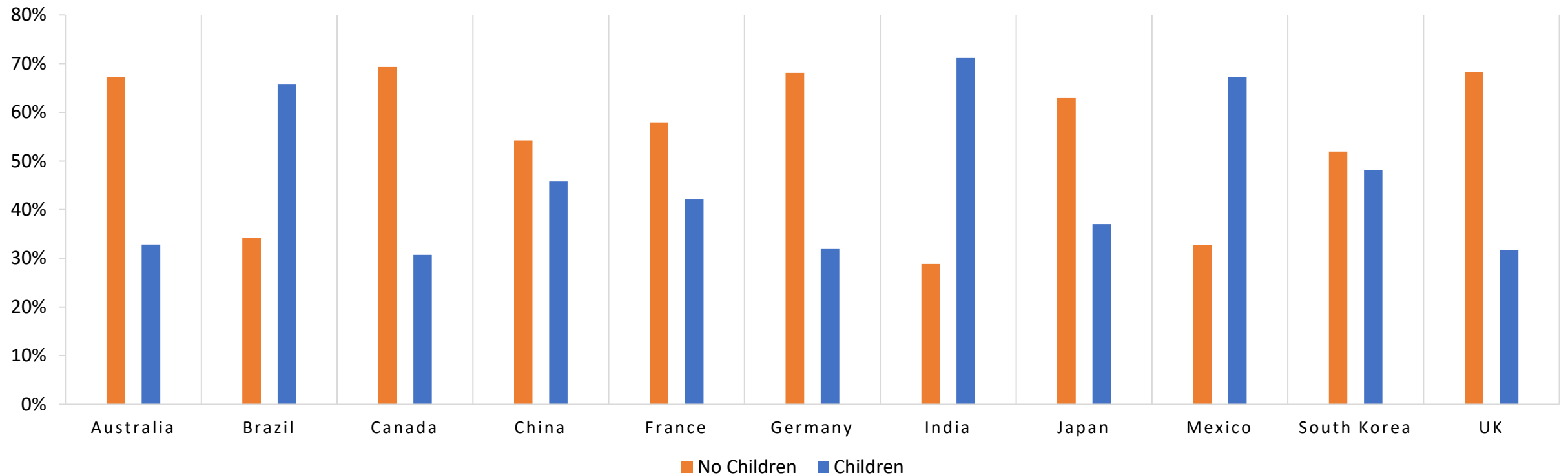


Base: Respondents who are likely to take an international trip in the next 12 months to the USA

Source: Brand USA/Engine, custom study

Likelihood to Travel to the USA in the Next 12 months By Children in Household (June 2021)

Different than intent to travel internationally, in the majority of the markets families with children express a lower intent to travel to the US than those families with no children



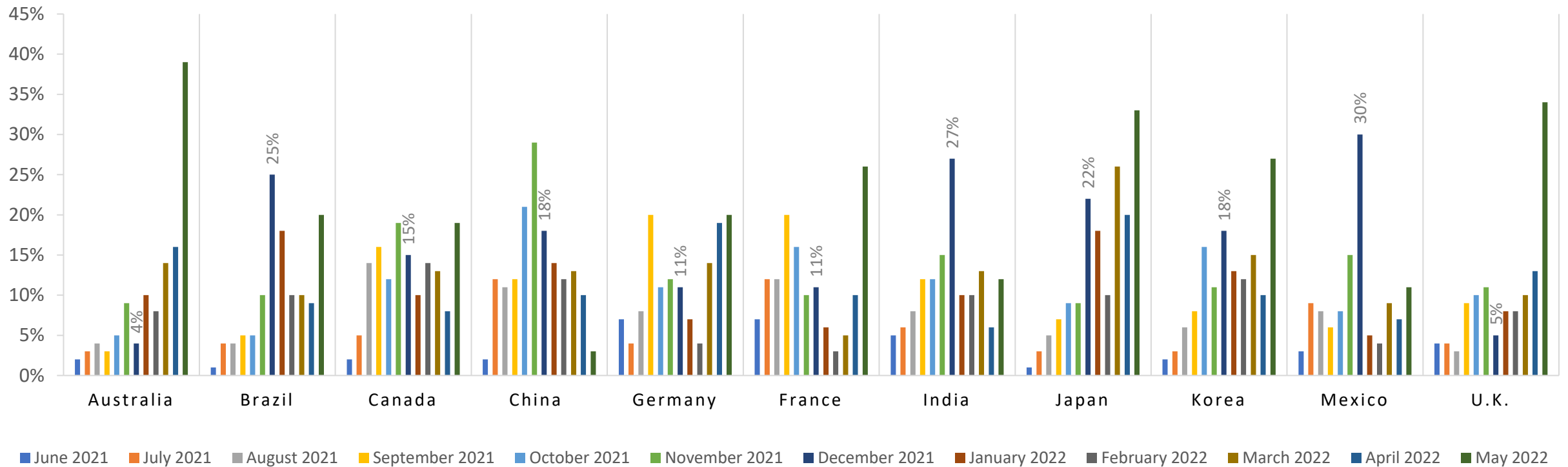
Base: Respondents who are likely to take an international trip in the next 12 months to the USA

Source: Brand USA/Engine, custom study

Trip Departure to the USA: Next 12 months

(June 2021)

Strong holiday travel from Mexico, Brazil, India, Korea and Japan



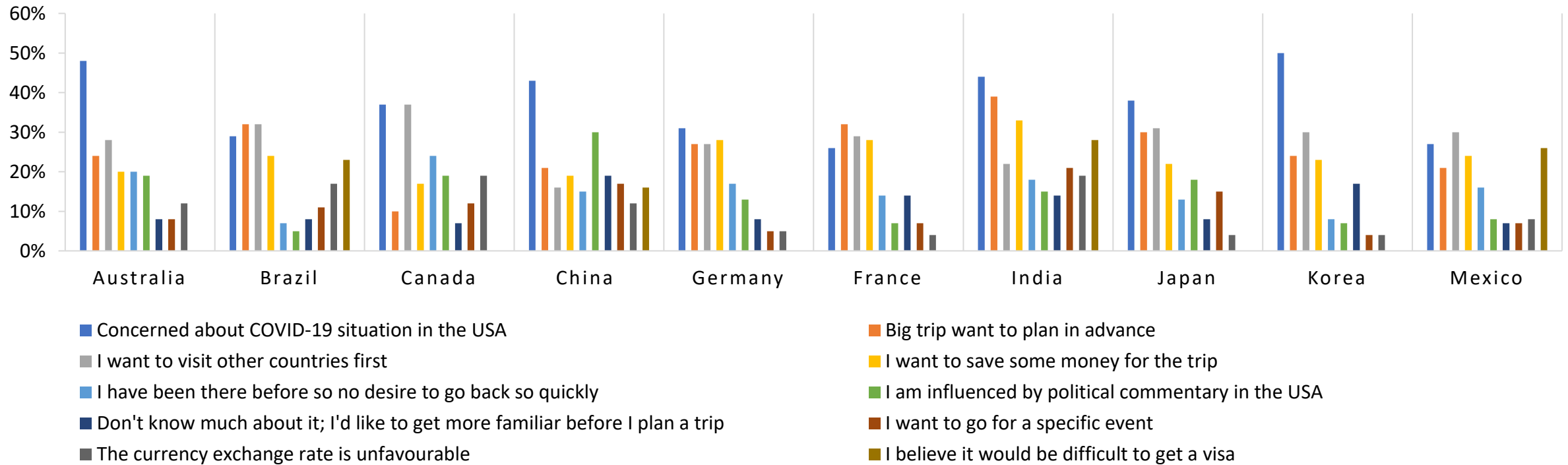
Base: Respondents who are likely to take an international trip in the next 12 months to the USA

Source: Brand USA/Engine, custom study

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

(June 2021)

Concerns about COVID-19 in the U.S. is the main reasons for not traveling to the U.S., followed by planning in advance for a big trip to the US and wanting to visit other countries



Base: Respondents who are likely/neither likely nor unlikely to take an international/a foreign holiday in the next 12 months but it won't be to the U.S.

Source: Brand USA/Engine, custom study

Key Takeaways

- Younger generations have the strongest intent to travel internationally; but when thinking about a trip to the US the older generations also show strong intent to travel
- Men have a stronger intent to travel than women
- Families with young children have a higher intent to travel internationally than families without kids





USA

VisitTheUSA.com

Brand USA

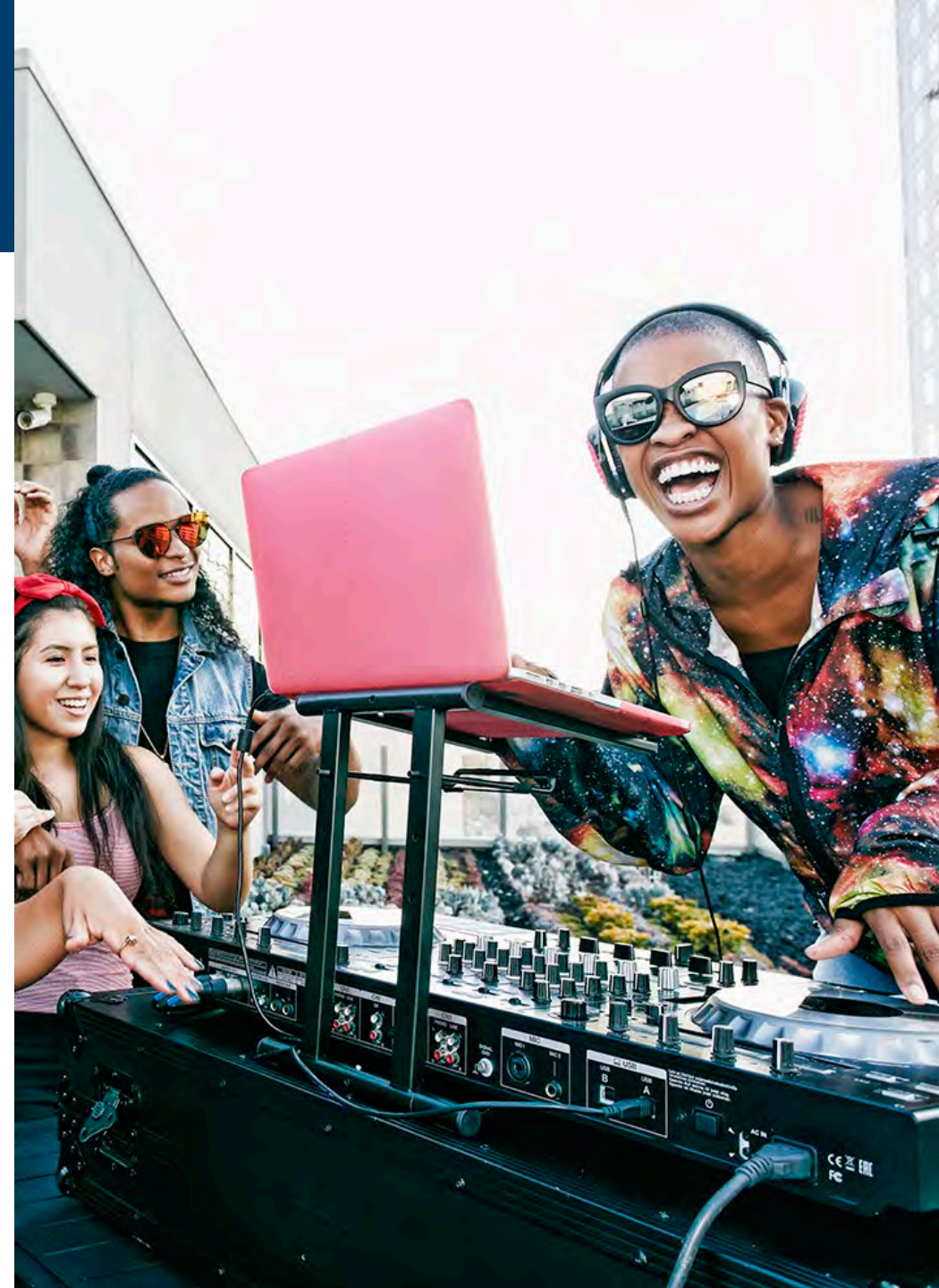
Partner Engagement and Opportunities

June 30, 2021

Approach to Re-Entry

Brand USA's Commitment to our Partners

- Brand USA is committed to providing **guidance, insights, and strategy** to help advise and strengthen our partners' international marketing efforts as they look to re-enter high ROI markets
- Prioritization of countries based on market conditions and consumer intent
- Opportunities for you to take advantage of the momentum in those countries that are getting ready to travel soon
- Brand USA's goal is to prepare our partners to be ready when the time is right to relaunch and create value



Opportunities: Engage & Activate



Brand USA Programs by International Market

Multi-Market Opportunities:

- Affinity Programs
- GoUSA TV
- Video Programs
- Global Inspiration Program
- Multi-Channels
- VisitTheUSA.com Programs
- Global Marketplace

Canada	Mexico	United Kingdom	Germany
<ul style="list-style-type: none">• Rogers Media• Global Marketplace• USA Discovery	<ul style="list-style-type: none">• Televisa• Global Marketplace• USA Discovery	<ul style="list-style-type: none">• British Airways Co-op• Trailfinders Co-op• JCDecaux• Global Marketplace• The Telegraph• USA Discovery• Travel Week	<ul style="list-style-type: none">• Canusa Co-op• FTI Touristik Co-op• Global Marketplace• USA Discovery• Travel Week



COMPASS

UNITED
STORIES



United Stories

United Stories will continue this year, building on the strong creative base we've built to evolve in its natural progression to now offer a page for visitors to write their own story contributing to the core united story of the USA.

The next phase of this campaign has evolved to suit the values and needs of the world today, while continuing to share the stories of real people connecting.

We'll continue to tell our partner's stories and show the world the unity and diversity within places, proximity, people, emotion and the feeling you get from discovering all the wonder the USA has to offer.

Strategic Framework



Primary Markets: UK, Canada, Mexico, Germany
Secondary Markets: Australia, France, South Korea

Integrated Global Recovery Platform

A Global Branding Campaign showing that America is more than a place it is a universal story of unity woven together by personal moments of human connection.

Co-Marketing with our partners by getting them to buy into Brand USA's recovery efforts

Airstream Create thematic/regional road trips that focus not just on destinations but on the human connections that are being forged inside and outside the airstream.

Events & in- market experiences such as dinners that unite create new moments of connection.

Thought Leadership: create virtual regional events, conferences, and speaking series that bring together America's diverse leaders across industries for knowledge sharing and networking.

PR placements and media partnerships that support in-market activations, airstream trips and celebrity endorsements.

Industry Events creating applicability at key industry events such as IPW, Travel Week and others

Influencers 50+ influencers will embark on 9+ itineraries that span the country, sharing their stories of lost and new connections and in the process show the world the possibilities available when traveling in the USA. .

Federal Stakeholders
Assets will be created to ensure that this platform is communicated and understood by federal partners





My USA Story

The USA story is written by everyone.

Each chapter different than the next,
every page transcribed from travelers and locals alike.
Our story is written by every gender, generation, color, culture, and
character.

It's a story of wide-open spaces, open restaurants, and open hearts.
Of breathtaking diversity of our lands and of our people.
Of warm welcomes, adventures around every turn,
And lifelong memories made off the beaten path.

Our United Story is written only with ellipses, and never a period.
So we ask others to write their story here, and extend ours.

Because here in the USA, there's a page waiting for you.
It's time to write your story

PARTNER OPPORTUNITY

“My Destination Story”

Personal connections with US Cities, States and Territories

- Leverages United Stories’ creative platform for a unique and personal way to tell stories about a place with different points of view
- Partners will be featured in :30 videos highlighting 3 personal perspectives about the destination, hotel or attraction

Media Amplification and Bookings

- Partners select key market (s), in which Brand USA is conducting the United Stories campaign to amplify content via dedicated paid media on IG/FB
- Brand USA will include videos across our own social platforms for extended global reach
- Participating Tour Operators and/or OTAs may be integrated as a CTA or advertising may be directed across social channels or the United Stories hub
- Partners have content rights into perpetuity



Example: My TENNESSEE Story

To really tell the whole USA story, we have to accept that everyone chooses to tell their American story their own way, even about the same place. The United Stories give us unique perspectives on the same state as told by different points of view. We'll partner with destination partners to tell the numerous stories of both American and international travelers within all 50 states.

TENNESSEE

VO 1: I tell my Tennessee story through food. The hot chicken is the best you'll ever taste.

VO 2: The local community has been evolving their fried chicken recipes for years.

VO 3: And without those people, you wouldn't have the famous Second Ave, playing every genre of music on the planet from blues to rock n' roll.

VO 1: That's how we choose to tell our Tennessee story. It's time to tell yours.



Multi-Channel Program Markets and Timing*

CANADA

Fall 2021: Sept - Oct

Winter 2022: Jan – Feb

Spring 2022: March – April

UK

Fall 2021: Sept - Nov

Winter 2022: Jan - Feb

GERMANY

Fall 2021: Oct - Dec

Winter 2022: Jan - Feb

Spring 2022: March - April

MEXICO

Fall 2021: Sept - Nov

Spring 2022: March – April

FUTURE MARKETS:

SOUTH KOREA

JAPAN

FRANCE

AUSTRALIA

CHINA

BRAZIL

*Markets and timing subject to change pending market conditions and consumer intent; updated 6.28.2021

Proven Channels Inspiring Travelers Around the World

Multi-Channel FY19 Results*

1.06M

TOTAL CLICKS



\$133.4M

TOTAL FLIGHT + HOTEL
BOOKINGS POST-VIEW,
POST-CLICK**



1.96M

TOTAL
ENGAGEMENTS



12.3M

TOTAL MOBILE
TAKEOVER
UNIT IMPRESSIONS



* Overview results include aggregate results for all Fiscal Year 2019 Multi-Channel programs except for China. FY20 campaign results incomplete due to COVID-19.

** Total gross revenue booked across Expedia Group brands after viewing or clicking on a Multi-Channel ad; 30-day look back window.

Questions?

