



# FY18 Q3 Marketing Committee Meeting

May 1, 2018







## OPENING REMARKS





**APPROVAL OF MINUTES\***





## CMO REPORT





# GLOBAL TRADE DEVELOPMENT UPDATE





# Global Trade Development Updates

## The Global Trade Development Team Hired Key Staff

- China
  - James Huang, Regional Director
    - This is the first time a Regional Director has been named in China
    - The Regional Director will coordinate all Brand USA China offices, to ensure alignment in strategy
  - Louis Lu, Sr. Manager
    - The Sr. Manager, China is a new role
    - Louis is an experienced Mandarin-speaking professional with a great knowledge of the China market
    - He has significant in-market contacts





# Global Trade Development Updates

## Key Initiatives – Product Development

- Created 21 Self-Drive itineraries (9 different languages)
  - 45 states, Washington, D.C., and 2 U.S. territories represented
  - Featuring 263 cities, towns and national parks
  - All itineraries are related to Brand USA initiatives
- Created 35 Suggested Regional itineraries (9 different languages)
  - 45 states, Washington, D.C., and all five territories
- Finalizing a Brand and Graphic Approach
  - This is for Brand USA-created itineraries that the Travel Trade can use to assist tourists plan their best American trip
  - Currently testing names for trademark
  - To be launched at IPW



# Global Trade Development Updates

## Market Updates – Canada

- Canadian Music Week: May 9-12
  - 2018 Theme: Spotlight on the USA
  - Week long opportunity to promote Year of Music Platform and *America's Musical Journey*
- Canadian Product Audit
  - Completing phase 1 of an in-depth audit on the current U.S. products being sold in Canada by major tour operators and travel suppliers
    - Compiled and sorted by state
  - Findings will provide opportunity to create specific product with Canadian tour operators and OTAs
  - This audit will set the bar for all other markets
  - First project completed under new Regional Director, Karly Melo





# Global Trade Development Updates

## Market Updates – Mexico



- Launch of AeroMexico film sponsorship
  - Regional Director, Lourdes Berho, secured first sponsorship ever by non- Brand USA staff member
- Hosted a Travel Trade lunch on April 14, 2018, during the Mexico City launch of *America's Musical Journey*
  - Nearly 90 high level trade professionals attended
  - Introduced the new Travel Trade website
  - Generated great in-market buzz
    - Chris Thompson had interviews with Reforma, Dinero en Imagen, El Economista, Imágenes del Turismo, Ladevi
    - Tom Garzilli had interviews with El Herald de México, Enfoque Noticias, El Economista, Merca2.0, Invertour, US Traveler Meeting with Advisory Board





# Global Trade Development Updates

## Market Updates – Mexico Continued

- Launching a Travel and Tourism Council (April-May)
  - Comprised of 15-20 business leaders in various sectors
    - Airlines
    - MICE
    - Education
    - Travel and leisure
    - Corporate travel
    - Government
  - This is the first time a group of this caliber has been formed to collaborate on ideas to help create business opportunities for Brand USA



# Global Trade Development Updates

## Market Updates – UK & Ireland

- UK MegaFam
  - April 26 – May 4
  - To pre-qualify for a place on the MegaFam, travel agents must sell British Airways (BA) or American Airlines flights to the USA
  - Results for 2018
    - A YoY increase of 75% in agents participating
    - A YoY increase of 159% in flights sold to the USA
    - A YoY increase of 401% in passengers traveling to the USA
    - Incentive has potentially generated incremental spend to the value of \$17 million (Calculated as each UK visitor spending an average of \$3,306 on a trip to the USA (NTTO, 2016))
  - 7 separate itineraries, covering 16 states
  - Grand finale in Nashville, TN to coincide with the BA inaugural London Heathrow flight







# Global Trade Development Updates

## Market Updates – UK & Ireland Continued

- UK Digital Campaign
  - First Brand USA led digital campaign with tour operators
  - 6 destinations participated in the campaign
    - Charleston, Fort Lauderdale, Hawaii, Rhythms of the South, Nevada, Oregon
  - Partnered with 8 tour operators that offered the best matching advertising
    - Bon Voyage, British Airways, Frontier, NATS, Netflights, Ocean Holidays, Trailfinders, Travelbag





# Global Trade Development Updates

## Market Updates – UK & Ireland Continued

- UK Digital Campaign Continued
  - Mid-campaign results to date (campaign ends May 20)
    - Trailfinders
      - ❖ 11% YoY increase in room nights for USA
    - Bon Voyage
      - ❖ 11% YoY increase in room nights for Hawaii
      - ❖ 50% YoY increase in room nights for Charleston
    - Travelbag
      - ❖ 412% YoY increase in room nights for Charleston
      - ❖ 38% YoY increase in room nights for Nevada
      - ❖ 20% YoY increase in PAX for North America



# PARTNER MARKETING UPDATE

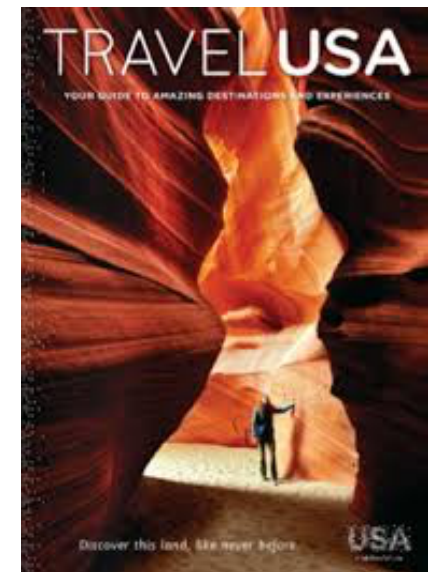




# INSPIRATION GUIDE

# Why an Inspiration Guide?

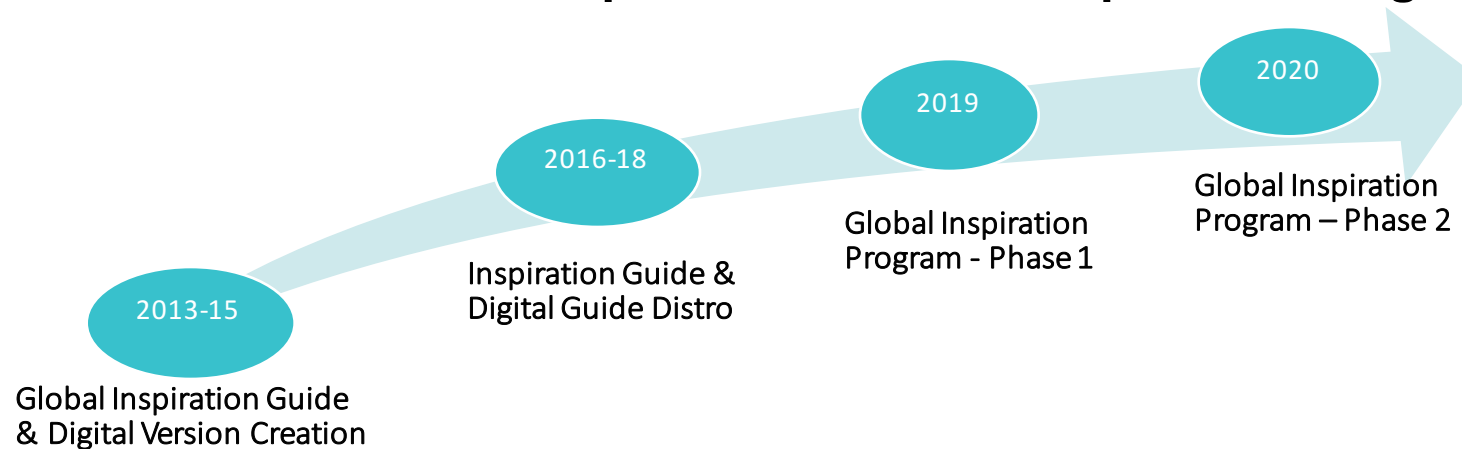
- High partner participation
  - Inspiration Guide: FY18 – 197 partners participated, resulting in 184 pages of content
    - FY17, 193 partners participated, resulting in 164 pages of content
  - Multi-Channel: FY18 – 203 partners YTD
    - FY17 – 266 partners participated in multi-channel programs
- Print is still relevant and popular globally
- The Inspiration Guide offers a variety of partners an opportunity to participate and promote their destinations





# Inspiration Program

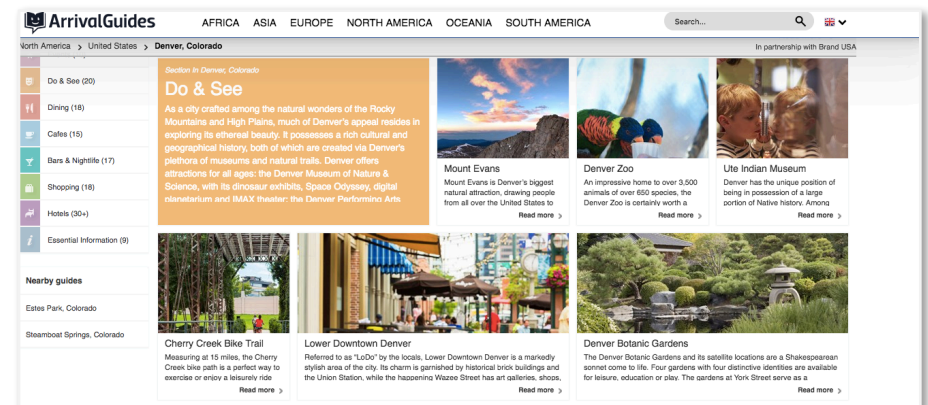
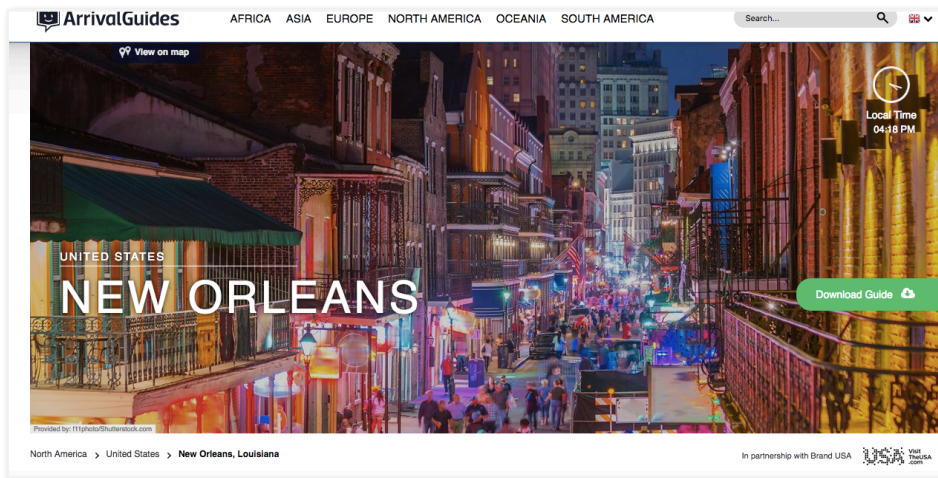
## Evolution from Inspiration Guide to Inspiration Program



- Integrated, turn-key top of funnel global program with enhanced, measurable results
- Increase value with smarter print distribution and expansive digital reach
- Deeper metrics to show performance and ROI
- Immersive digital content experiences through new mobile-first creative units
- Create deeper reach/engagement of content in partner-specific markets

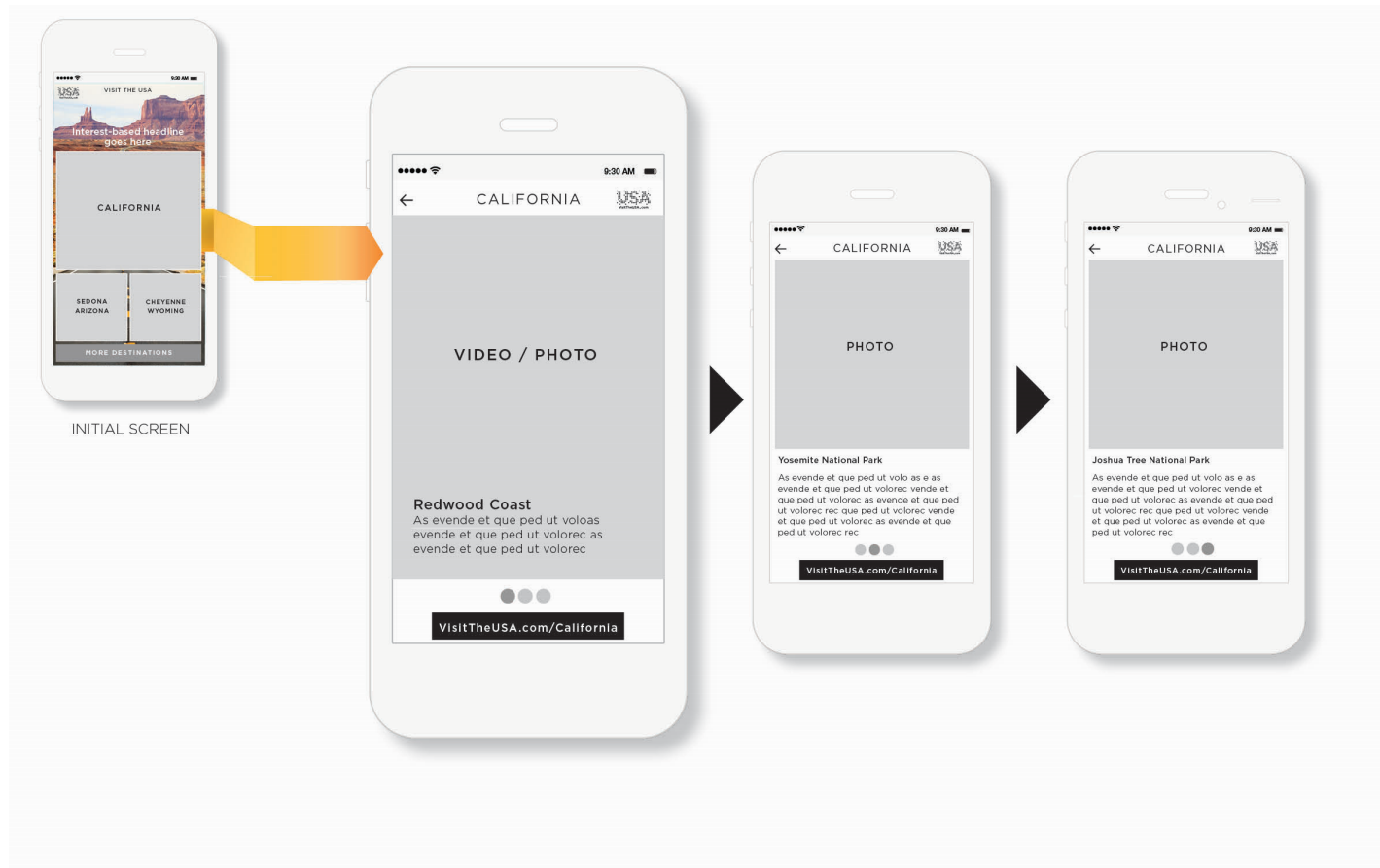
# Inspiration Program – Digital Distribution 2018

- Test & Learn with Arrival Guides
  - 7 City Guides live on network; 2 Guides w/Marketing Campaign
  - Initial performance results mid-April 2018
  - Exploring “add-on” packages for 2019





# Mobile Takeover Inspiration Strategy - 2019





# THOMAS COOK – PARTNERSHIP



## 2017 Results

- **759,816** more U.S. passengers in 2017 vs. pre-partnership 19,463 in 2013
- **\$2.94bn** incremental U.S. visitor spending generated across the period
- **\$1.48bn** incremental annual U.S. visitor spending being generated
- **143mm** potential U.S. visitors reached across platforms
- **83,000** social competition entries generated
- **2.25bn** online advertising impressions served to data-targeted audience segments
- **12.3mn** travel-intenders watching USA video views in travel stores





**Thomas Cook**  
Media & Partnerships



## Results: USA Everywhere Campaigns for Destination Partners

- 8 destinations participated in 2017
- 23 additional destinations partners scheduled for 2018
- Tampa bookings from the UK +22%, Social 23%
- Memphis bookings from the UK +60% and 7:1
- Nevada room nights across UK & DE +60%
- Illinois room nights across UK & DE +20%
- Minnesota passenger numbers from DE +70%





A DJ is seen from behind, standing at a glass-topped DJ booth. The booth is equipped with a Pioneer mixer, a laptop, and various cables. The DJ is wearing a blue long-sleeved shirt and white pants. In front of the DJ, a large, dense crowd of people is visible, illuminated by numerous bright, white stage lights that create a dramatic, high-energy atmosphere. The lights are directed towards the crowd, creating a sense of depth and scale. The overall scene is a vibrant representation of a live music or electronic dance music event.

# INTEGRATED MARKETING UPDATE





## MEDIA STRATEGY & MEASUREMENT



## A Little History

### Then (2012)

- Launched campaign in 5 global markets
- Linear TV was bulk of the media plan
- One-size-fits-all messaging was sufficient
- Social was organic

### Now (2017+)

- Expanded to 14 global markets
- Digital platform mix is the new standard
- Messaging can be customized at the consumer level
- Paid social is the rule

### The Challenge:

How to shift resources to meet marketing challenges across more markets in an ever-changing digital world?





# New Thinking For 2017

**Insight: The Agency of Record (AOR) model doesn't work for us.**

## **Why not?**

- Too much money spent on fees and production
- One-size-fits-all messaging is outmoded
- Not enough expertise across digital channels

## **What we needed?**

- Shift spending from non-working to working dollars
- Move away from traditional advertising creative and messaging
- Build platform specific expertise

# The New Model

## What we did:

- Realigned budget from production and fees to increase media dollars
- Took cues from social media messaging to drive engagement
- Moved away from global AOR retainers to bring on "best in breed" resources



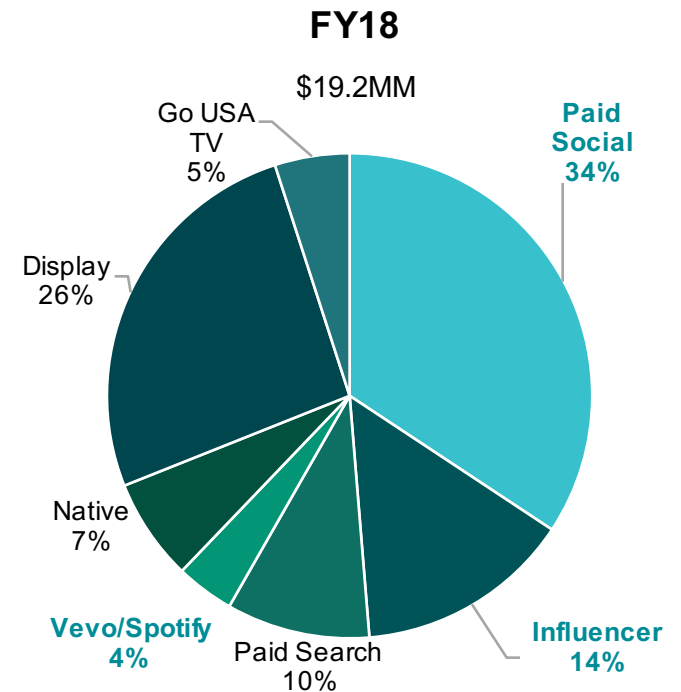
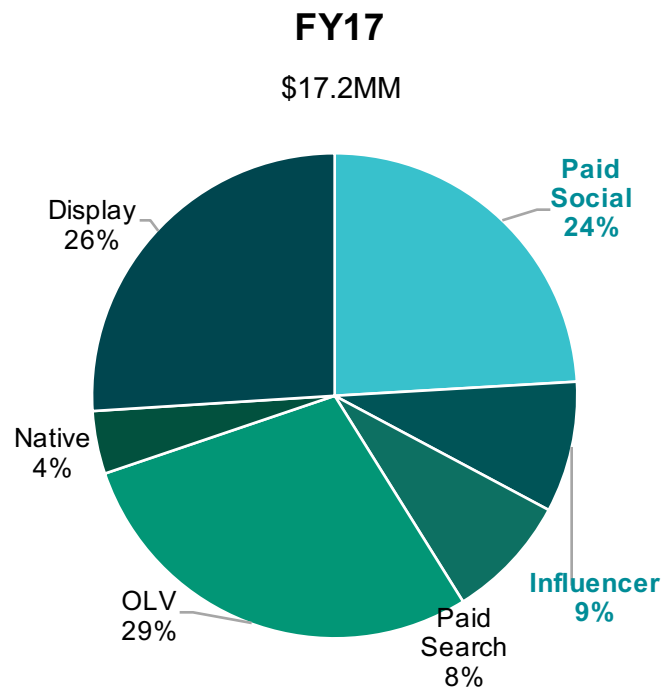


# How We've Shifted Media Spend

Increase spend in channels with formats that are social in nature to allow consumers to engage directly with Visit the USA content.

In FY18 we continue to emphasize content that is engaging from a social perspective, delivered in new and creative ways:

- Videos and rich media on social
- Influencer video content
- Sharable playlists on Spotify

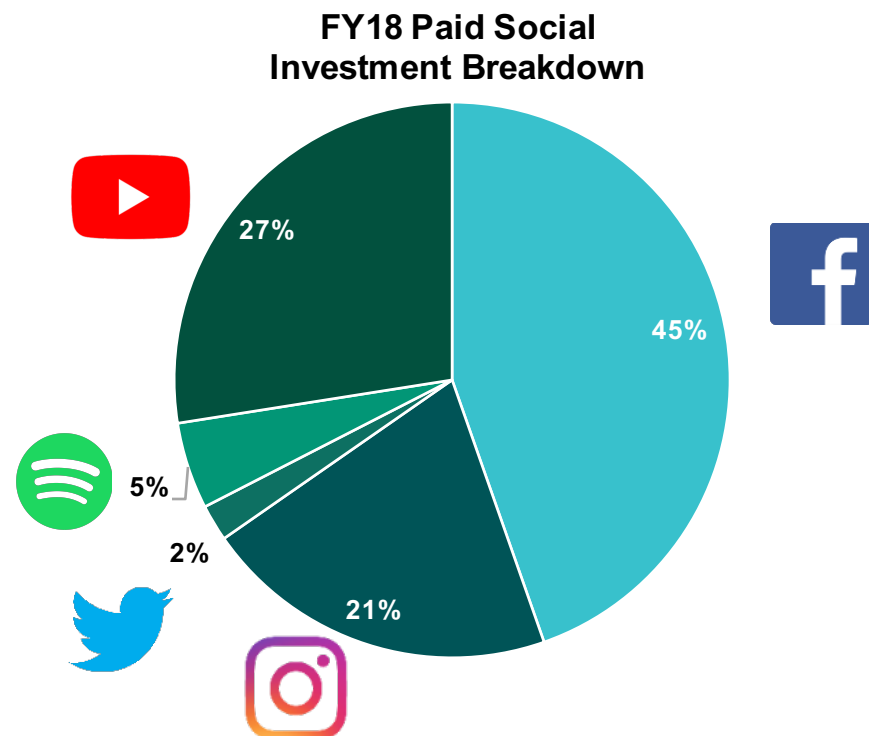


# Our Social-Centric Approach

We use a variety of tactics to focus on driving consumer engagement.

## Measurement Metrics

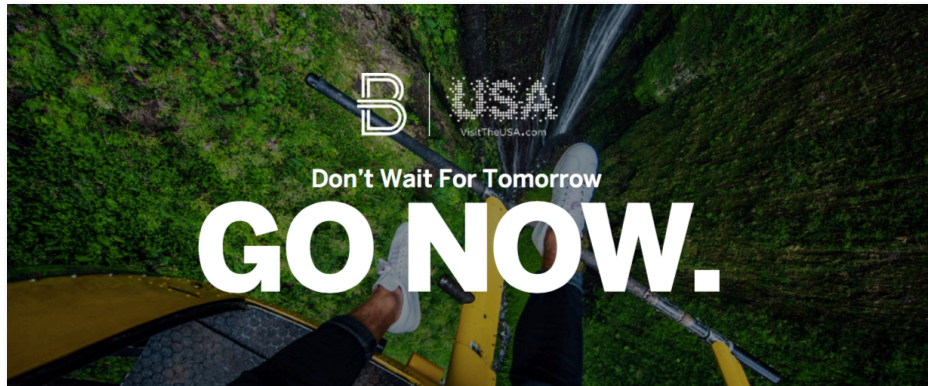
- Total Engagements
- Total Video Views
- Comments/Likes/Shares/Retweets
- Playlists Listens/Shares
- Cost Per Engagement
- Cost Per Video View



*Note: YouTube budget includes paid amplification + influencer collaborations*



# How's It Working? January 2018 Inspiration Program



Right after the holidays, the entire world is dreaming about travel. Our goal was to capture the attention of international travelers and motivate them to plan their USA trip.



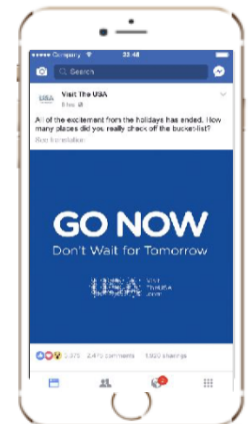
Power of  
Retargeting



Immersive Ad  
Units



Authentic  
Content





# Results! January 2018 Inspiration Program

**We focused on first person video storytelling.**

## Our Results

Though we didn't run an Inspiration campaign in 2017, versus the 2016 campaign we achieved significant results.

- 397M impressions
  - +128% v. 2016 (-4% CPM vs. 2016)
- 2.1MM engagements
  - +298% v. 2016 (-45% CPE vs. 2016)
- 23.2MM completed video views
  - +698% v. 2016 (-70% CPCV vs. 2016)

And versus the overall measurements of the FY17 "Go" campaign, which focused on optimizing video views, we achieved higher completion & engagement rates.

- View-Thru Rate (VTR) +134%
- Engagement Rate (ER) +107%

## What We Learned

These numbers are driven by our strategy to make creative that follows natural social behaviors (social first).

- **Video Creative:** Most like to watch video content that is < 15-seconds. It's important to create mobile-first video content to account for all mobile behavior.
- **Buying Strategy:** Choose the video views objective whenever possible, as this optimizes delivery of ads to people.

## Implication

On social, we need to build for speed.





## GIANT SCREEN MOVIE UPDATES

# Mexico City Premiere (03.15.18)

MacGillivray Freeman's  
**AMERICA'S  
MUSICAL  
JOURNEY**

Launch event held at the Papalote Museo del Niño

## Presenting Sponsors:



## Overview:

- Expanded on the successful 2016 launch of *National Parks Adventure* with a fully integrated support program, including trade, consumer and industry touchpoints.
- Premiere event attended by hundreds of luminaries including industry VIPs, media, mega influencers and travel trade partners.

## Earned Media:

- 39 media interviews and other coverage generated 45+ million earned media impressions with an ad equivalency of \$4.4 million dollars.
- Coverage from high profile publications in Mexico such as *Rolling Stone*, *Forbes Mexico* and Imagen Television with additional coverage expected.

## Consumer Activation:

- Interactive digital media campaign in partnership with Shazam enabled consumers to dive deep into *America's Musical Journey* content via interactive OOH billboards and pop-up concerts.





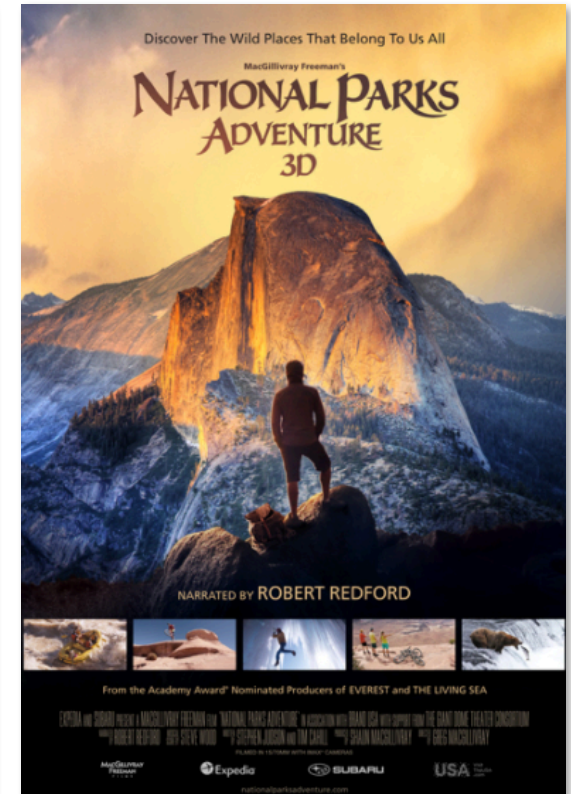
# Upcoming Premieres & Events

## ***America's Musical Journey***

- April 18-20 Beijing Film Festival, China
- May 7<sup>th</sup> Montreal, Canada
- May 9<sup>th</sup> Canadian Music Week (Toronto)
- May 30<sup>th</sup> Paris, France
- Mid-June Toronto, Canada
- July 1<sup>st</sup> Valencia, Spain
- July 3<sup>rd</sup> The Hague, Netherlands

## ***National Parks Adventure***

- April 1<sup>st</sup> Carnival Cruise Ship Horizon
- June Hong Kong Space Museum



A large crowd of people is seen from behind, looking towards a bright stage at night. The stage is illuminated by intense orange and yellow lights, with thick smoke or fog rising from it. A person is visible on the stage with their arms raised. The overall atmosphere is energetic and festive.

**HEAR THE MUSIC. EXPERIENCE THE USA.**



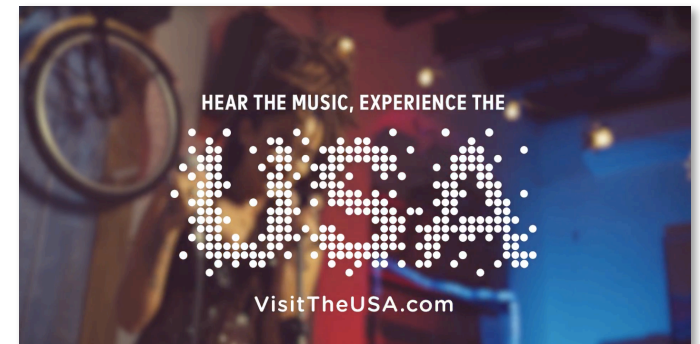
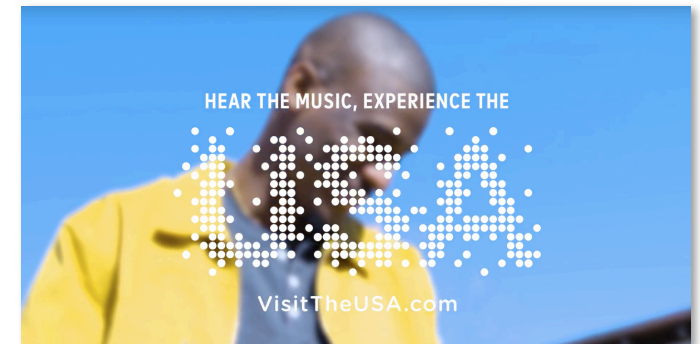
# Music Platform: Hear The Music. Experience the USA.

## 1 song, 5 artists, 5 genres, 5 cities

On April 9th, we launched "Hear The Music," a multi-platform campaign that builds on the themes we've introduced with *America's Musical Journey*.

Using the classic American song "Do You Wanna Dance" by Bobby Freeman, we asked 5 different artists to interpret the song in ways that reflect the unique culture of their city.

At the heart of the campaign are emerging artists we selected to bring the destination sounds to life, each with a deeply personal story to tell about how their city inspires their music.



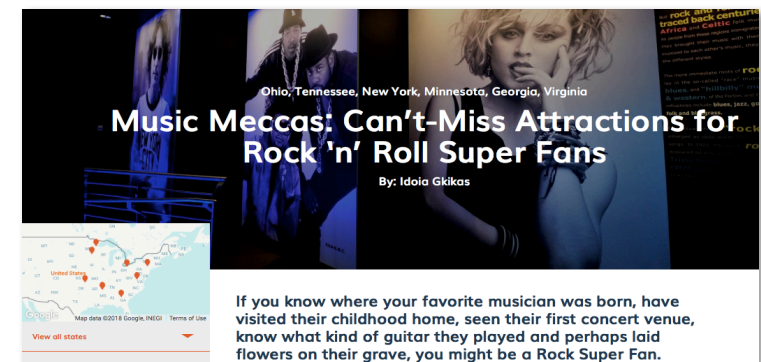
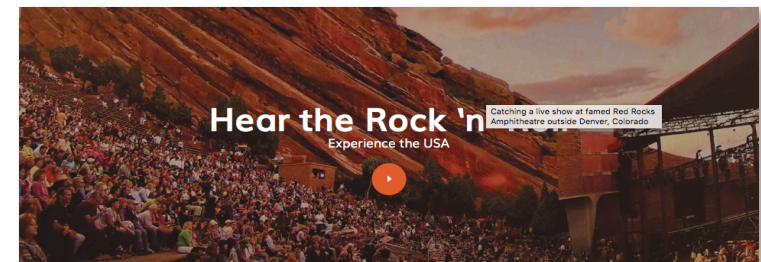
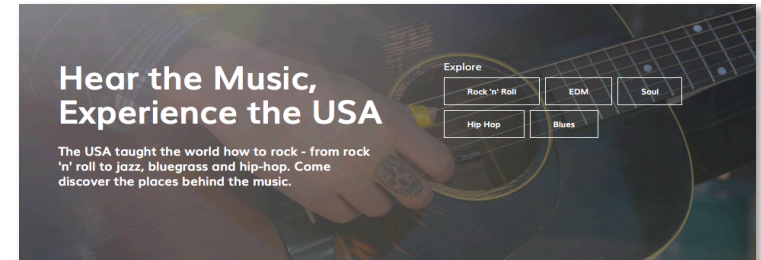
# Music Platform: Hear The Music. Experience the USA.

## 1 song, 5 artists, 5 genres, 5 cities

Digital display and social media will drive traffic to the *Hear The Music. Experience the USA.* landing pages on VisitTheUSA.com.

On the site, visitors will be encouraged to watch the videos and engage with other content that connects music, culture and travel opportunities available in the USA.

To enhance the power of the campaign, we've partnered with Spotify and customized U.S. city playlists to virtually explore each city via users' favorite songs.

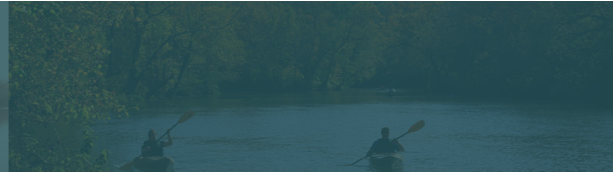
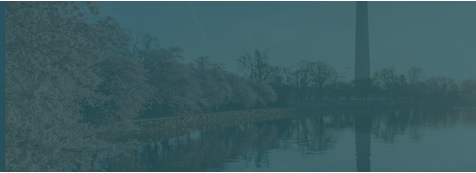






GO USA: STREAMING TV

Connected TV



# GoUSA



## Two New Spots on Roku



Sound & Vision :30



For The Love Of Music :30



# Banner Ads on Roku



**Hike the Trails of the  
Pacific Northwest**

**Roku**

Available on the  
Channel Store

**Go  
USA**

Explore the USA  
like never before.



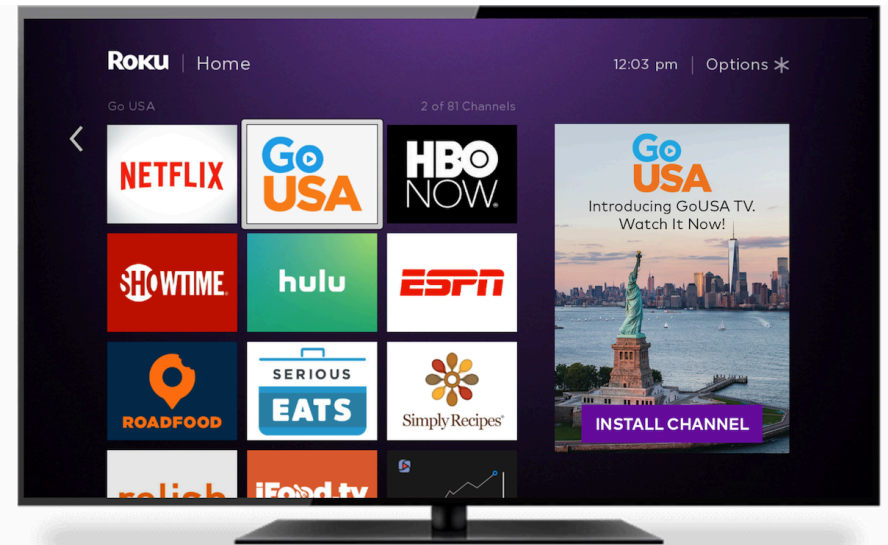
# GoUSA TV on Roku, Amazon Fire, and Apple TV

1,282,165 International Views to date

Country	% of International Views
Canada	61.08%
Mexico	15.48%
Europe	10.22%
All other countries	9.01%
India	2.21%
Japan	0.50%
Colombia	0.48%
Australia	0.42%
Brazil	0.30%
Chile	0.19%
China	0.08%
Korea	0.02%

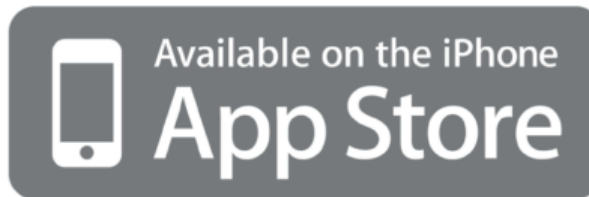
## Channel Downloads by Platform

Roku	78%
Amazon Fire	21%
Apple TV	1%



## Go USA TV: Coming Soon

- Mobile Applications for IOS and Android smartphones
- Users will also be able to project their mobile phone to Google Chromecast





## Go USA TV: Coming Soon

From rock 'n' roll to jazz, soul to blues to hip-hop... music is the sound of culture, and everywhere you go in the USA you'll find diverse local cultures overflowing with creativity and personality.

**American Sound** is a celebration of all the songs, genres, and cities that make American music so unique.

Building on the "Hear The Music" concept, we'll continue to explore classic American songs and interpretations across genres.



Interested in participating in the American Sound series?  
Please contact your Partner Engagement Representative.

## Go USA TV: Coming Soon

Hosted by award-winning journalist Michael Stern, **Roadfood** guides eaters to the best local restaurants and hidden gems in America, celebrating regional dishes from coast to coast, and ensuring that travelers will always know just where to go to taste the most authentic, local flavors imaginable.

**Roadfood** builds on the success of our “Road Trip” series, which is some of the most highly visited content across all of our platforms and in all of our target markets.



Interested in participating in the RoadFood series?  
Please contact your Partner Engagement Representative.





PLATFORM INNOVATIONS



# Expedia *Sound Travels* Co-branded Initiative

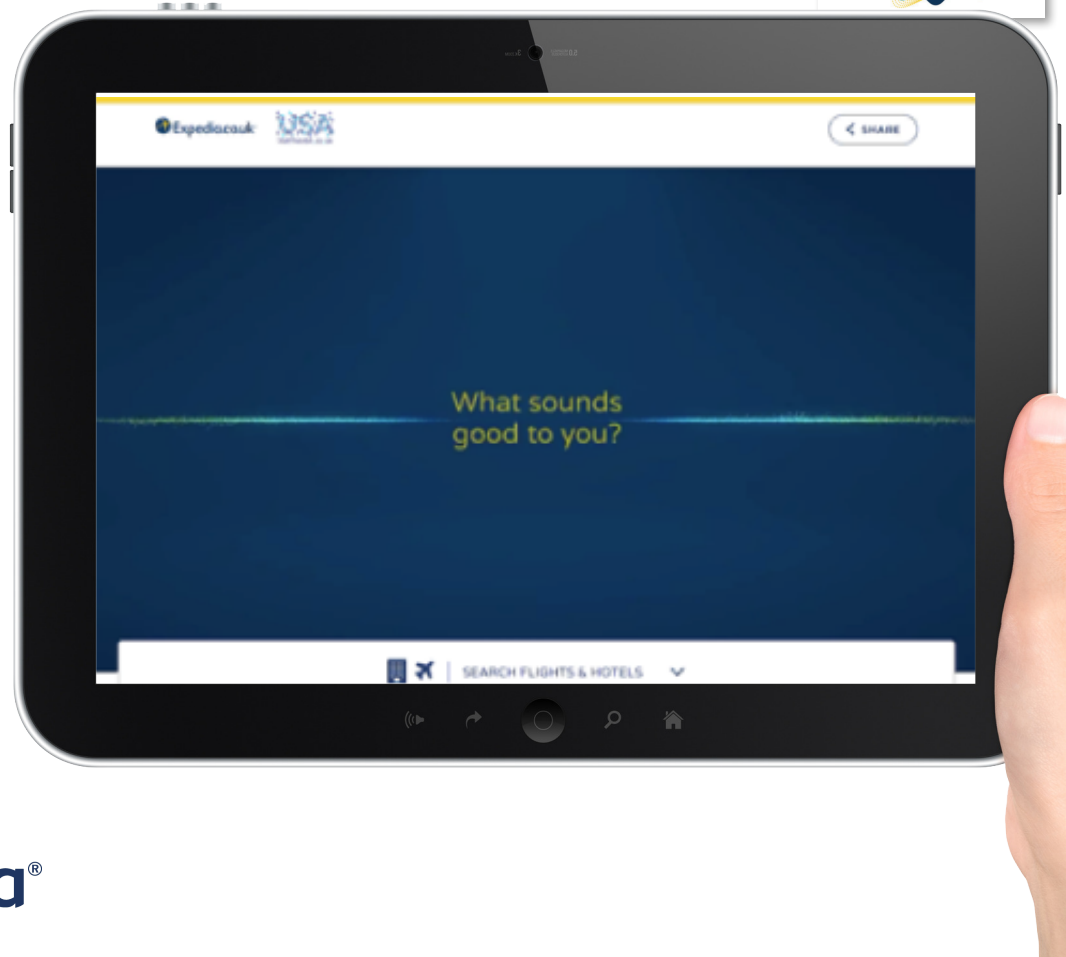


**Launched on March 1, 2018, the co-branded, interactive content hub uses Immersive audio experiences to treat travelers to the sights and sounds of the USA.**

Visitors can also explore additional destination content on the hub, including

- Editorial-style articles
- Photos
- Suggested itineraries and
- Special deals and promotions

To support Brand USA's objective of increased engagement and international visitation, the bespoke campaign hub also features an integrated booking widget to help potential travelers move from inspiration to exploration to booking.



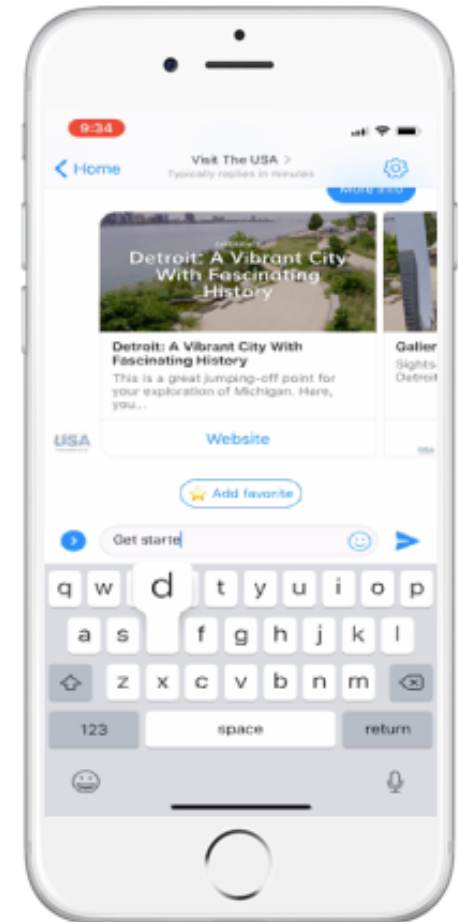
# Artificial Intelligence & Machine Learning: Chat Bot

From Wikipedia: A chatbot (also known as a talkbot, chatterbot, Bot, IM bot, interactive agent, or Artificial Conversational Entity) is a computer program which conducts a conversation via auditory or textual methods. Such programs are often designed to convincingly simulate how a human would behave as a conversational partner.

These conversational interfaces are the next phase in digital communication and will help us guide consumers to travel content tailored to their needs.

We launched the Visit The USA chatbot in the UK on Messenger in March 2018

- Goals
  - Get closer to the market through 1:1 conversation opportunities
- Initial test resulted in
  - 700+ new conversations
  - 1,630 messages received / 2.5 average per user
- Insights
  - Implications for direct tailored messages, curated content, 1<sup>st</sup> party insights
- Next Steps
  - Goal is to evolve into the personification of *Ask a Local*, a local knowledge bot that suggests places to go for authentic experiences
  - Additional launches in Canada, Australia, and India as well as the website







ASK A LOCAL

B&C  
PRETENTIOUS DRINKS  
→ WITHOUT ←  
THE  
PRETENTIOUSNESS

# Ask a Local

**Ask a Local gives voice to individual, real travel experiences in the U.S. by highlighting first-person perspectives of locals.**

- Uses a documentary-style approach to share amazing travel experiences and points of interest through the voices and faces of U.S. residents.
- Appeals to international travelers with a desire to receive authentic travel recommendations from warm, welcoming, and knowledgeable locals.
  - Recently wrapped/Recovery Zones: Mississippi: Jackson & The Gulf Coast; Houston, TX; South Florida: Miami & Key West; USVI: St. Thomas, St. John & St. Croix; Puerto Rico
- Goal: Capture all 50 States, 5 Territories and 1 District by FY2019
- These travel stories will live on TheBrandUSA.com, VisitTheUSA.com, GoUSA TV, YouTube, and shared across corporate and consumer social media channels as part of our always-on content strategy.





## Ask a Local

### Interested in participating?

We're still considering submissions from partners!

If you're interested in providing interviews from locals and footage and photos to support their stories and recommendations, please visit:

<http://www.thebrandusa.com/one-big-welcome>

Questions?

Please contact your Partner Engagement Representative.





## QUESTIONS & ANSWERS





**CLOSING REMARKS**





**Like/Follow/Share**

**Travel Industry**

**TheBrandUSA.com**



@BrandUSA



BrandUSATV



BrandUSA

**Consumer**

**VisitTheUSA.com**



@VisitTheUSA



VisitTheUSA



VisitTheUSA



VisitTheUSA

**GoUSATV**

Available on Roku,  
Apple TV, and  
Amazon Fire

# Thank You

