



Q4-FY2018 Marketing Committee Meeting

August 1, 2018



A photograph of an elderly man with grey hair, shirtless, sitting on a pebbly beach. He is holding several small, yellowish fish in his hands. In front of him is a large, woven, brown basket. The background features a clear turquoise ocean, a white sandy beach, and a large, steep, green mountain under a blue sky with white clouds.

OPENING REMARKS

A photograph of the Golden Gate Bridge in San Francisco at sunset. The bridge's iconic orange-red towers and suspension cables are silhouetted against a sky transitioning from orange to blue. The city skyline is visible in the distance across the water.

APPROVAL OF MINUTES*

CMO REPORT

A scenic photograph of a coastal fortification. In the foreground, a dark stone wall runs across the bottom. To the right, a large, weathered stone tower with a small arched window stands prominently. In the center, a smaller stone structure with a domed roof is visible. The ocean stretches out to the horizon under a blue sky with scattered clouds. A vibrant rainbow arches across the sky, its colors clearly visible. A semi-transparent teal banner is overlaid on the left side of the image, containing the text 'CMO REPORT' in white, bold, sans-serif capital letters.

A large blue umbrella is the central focus, its ribs radiating from a central point. It is situated inside a large, yellow, translucent tent-like structure. A person's silhouette is visible at the bottom, holding the edge of the umbrella. The ground is covered with a red and brown patterned material. A dark teal banner with white text is positioned across the middle of the image.

GLOBAL TRADE DEVELOPMENT UPDATE



BRAND USA TRAVEL WEEK

Brand USA Travel Week – September, 2019



**One trade
show**



**300
exhibitors**



**Educational
seminar program**



**Hosted
events**



3 days



**6,600
meetings**



**500
delegates**

BRAND USA TRAVEL EXPO



**Sponsorship
opportunities**



**Inspirational
speakers**

A photograph of a traditional Chinese garden. In the foreground, a pond is filled with green lily pads. A white stone railing separates the pond from a paved walkway. In the background, a traditional Chinese pavilion with a dark wooden frame and a grey tiled roof with upturned eaves stands on the walkway. To the left of the pavilion, a large, craggy rock formation is partially covered in green moss. A large tree with green leaves is on the far left, and a weeping willow tree is visible behind the rock formation. The overall scene is peaceful and scenic.

CHINA

Developing a strategy for China and Asia to get ready for RFP in 2019





2018-2019 China Key Activities

- | | |
|---------------------------------|----------------------|
| • Tourism Leadership Summit | Sep 9 - 13, 2018 |
| • Mega FAM | Oct 24 - Nov 1, 2018 |
| • CITM | Nov 16 - 18, 2018 |
| • China Sales Mission | Mar 18 - 22, 2019 |
| • Product Audit and Co-ops | Ongoing |
| • WeChat B2B Platform | Coming Soon |
| • Travel Trade Advisory Council | Coming Soon |

CITM 2018

- Shanghai, China: November 16 - 18, 2018
- Attendance: 18,000/trade + 30,000/public
- Over 100 B2B meetings with travel agencies
- Guided key media to have interviews with selective U.S. partners
- Registration has opened online



China Sales Mission 2019

- 4th China Mission: March 18 - 22, 2019
- Cover all key markets
- B2B appointments and media interviews
- Registration will open by Fall, 2018



China Mega FAM 2018

- 2018 China Mega FAM: October 24 - November 1, 2018
- Airline Partner: United Airlines
- 50 top tour operators
- Five unique itineraries and gathered in Washington, DC for finale event





Coming Soon!

WeChat B2B Platform

- In conversation with WeChat and Avia reps
- Proposed functionality to include:
 - USA Discovery Program
 - Travel Trade Website
 - Link with Media Valet
 - Promote itineraries
 - Mini Program

Travel Trade Advisory Council

- Goal and mission statement
- High level executives in all tourism sectors
- Quarterly meeting

U.S. – China Tourism Leadership Summit

- Build and strengthen relationships between the U.S. and Chinese travel industries
- Platform for discussion between tourism industry leaders and government officials
- Address issues impacting tourism, share best practices, and receive industry updates



- Reaffirm the importance of travel and tourism to the two largest economies in the world
- Showcase great destinations and experiences

2018 U.S. – China Tourism Leadership Summit

- 12th annual summit
- September 8-13 in Hangzhou, China
- ~200 attendees, including national and state/provincial tourism leaders, major tour operators, attractions, media, and other top Brand USA and CNTA partners
- U.S. delegate day, plenary day, and fam tours
- Topics likely to include culture and tourism and new tourism governance structure in China
- RFP for 2019 host city to go live in May and winner to be announced in Hangzhou



A wide-angle photograph of a vibrant waterfront scene. On the left, a row of buildings with terracotta roofs and light-colored walls lines a promenade. A path paved with light-colored stones runs alongside a dense bed of bright red bougainvillea flowers. Several people are walking along this path. To the right, a calm body of water is filled with numerous sailboats of various sizes, their masts reaching towards a clear blue sky with scattered white clouds. In the far distance, a range of low mountains is visible under the horizon. A semi-transparent dark blue banner is overlaid across the middle of the image, containing the text 'PARTNER MARKETING UPDATE' in white, bold, sans-serif capital letters.

PARTNER MARKETING UPDATE

FY2018 Year-end Forecast

FY18 In-kind Revenue	\$55.39 million
FY18 Cash Contributions	\$45.61 million
TOTAL	\$101.00 million

A DJ is seen from behind, standing at a glass-topped DJ booth. The booth contains a Pioneer mixer, a laptop, and some papers. The DJ is wearing a blue jacket and white pants. In front of the DJ, a large crowd of people is visible, illuminated by numerous bright, white stage lights that create a dramatic, hazy atmosphere. The scene is set at night.

INTEGRATED MARKETING UPDATE

A woman with curly hair, wearing a grey hoodie, orange waders, and blue gloves, stands under a large black tarp. She is holding a large fish horizontally in front of her. The tarp is draped over a structure, possibly a boat or a dock, and the background shows green trees and a body of water. A teal banner with white text is overlaid on the image.

MEDIA STRATEGY & MEASUREMENT

A man wearing a light-colored cowboy hat, sunglasses, and a dark vest over a striped shirt is playing a harmonica into a microphone. He is pointing his right arm towards the right side of the frame. In the background, there is a large, illuminated sign that reads "Rock'n' Bowl" in a stylized, cursive font. An American flag is visible behind the sign. The scene is dimly lit, suggesting an indoor venue at night.

HEAR THE MUSIC
EXPERIENCE THE USA.

.....

Hear The Music, Experience The USA.

Note: Add display ad or other media asset

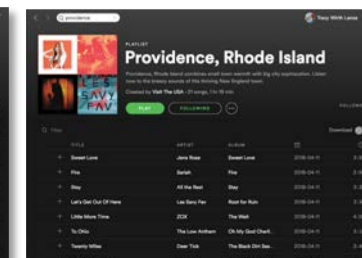
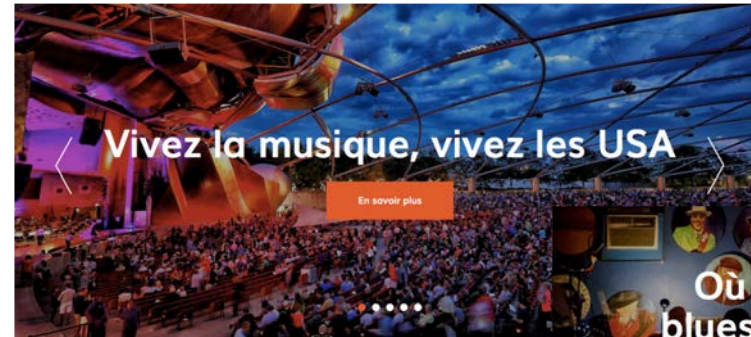
First year of the music initiative is successfully reaching consumers cost effectively

Overview

- Media mix of online video, display, and Spotify audio ads drive to music hub
- Music hub includes Spotify playlists, long form videos, and additional destination-focused music content

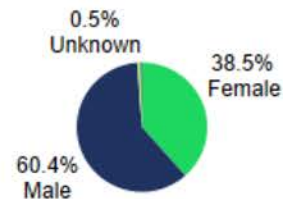
Initial results

- -27% in CPPV compared to Go
- +6% in pages per session vs. Go
- +20% in session duration vs. Go
- Top streaming countries: BR, MX, DE

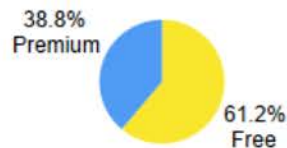


Spotify Data

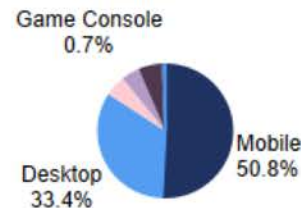
Streams by Gender



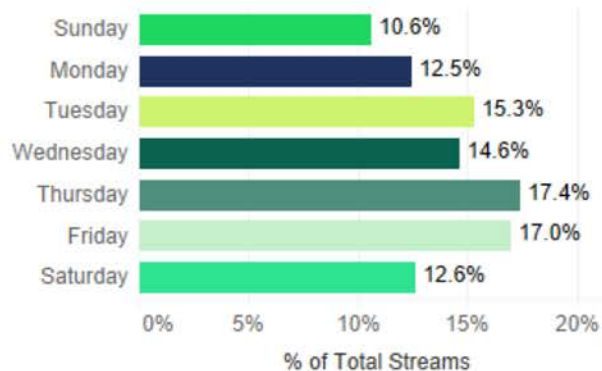
Streams by Product



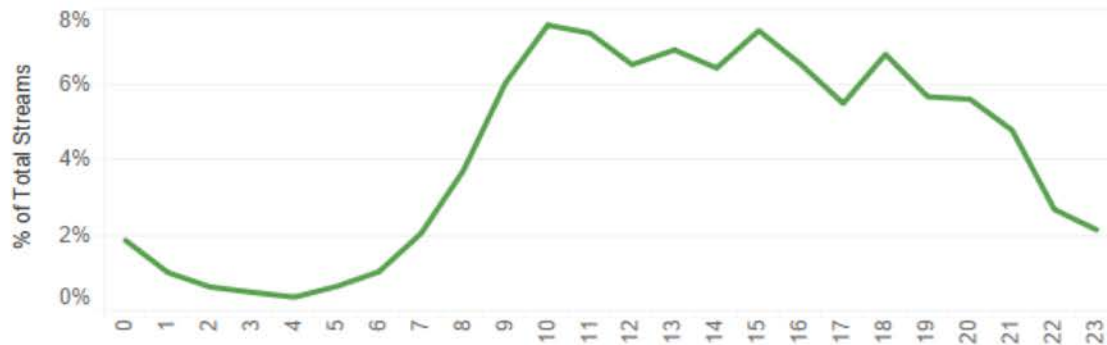
Streams by Platform Type



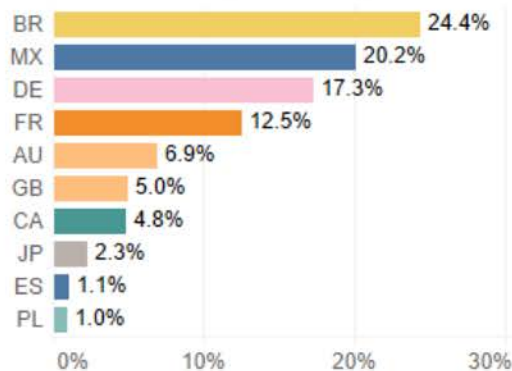
Streams by Day of Week



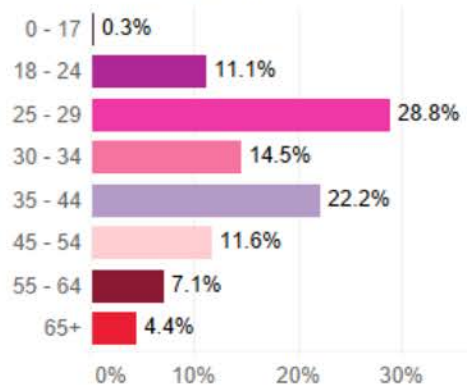
Streams by Hour



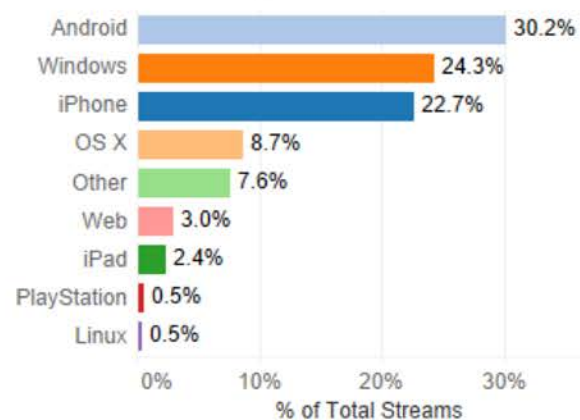
% Streams by Country



% Streams by Age Bracket



% Streams by Platform Client



MacGillivray Freeman's

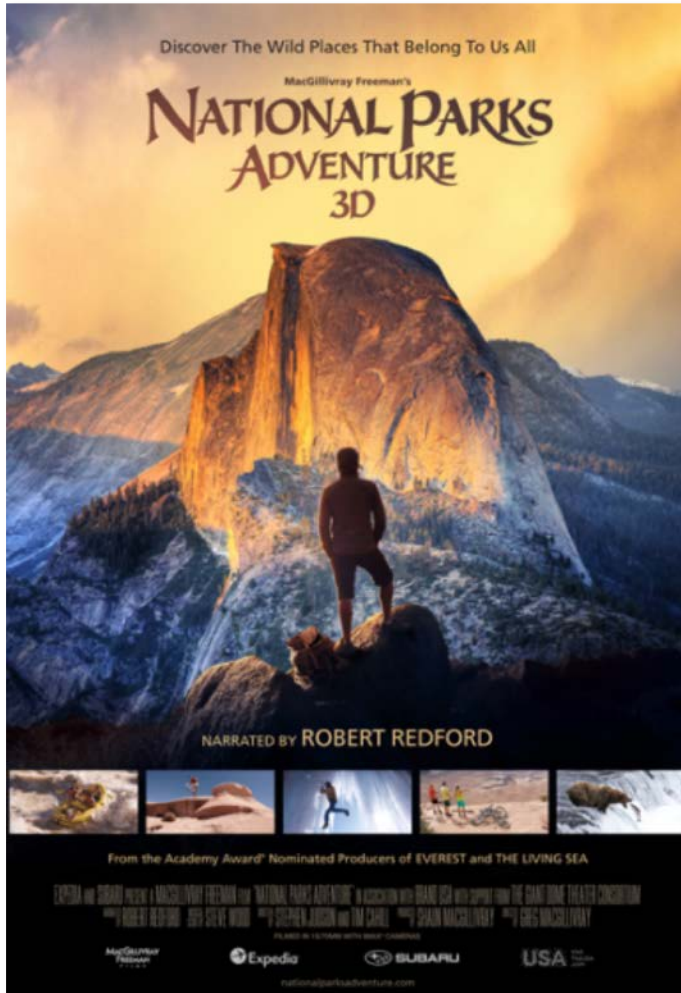
NATIONAL PARKS ADVENTURE 3D



“National Parks Adventure” ROI Study



“National Parks Adventure” ROI Methodology



- Phocuswright executed primary consumer research in theater and online to measure the influence of the film
- In-theater field work for the National Parks Adventure ROI study was completed in March in Toronto, Mexico City, Paris and Mumbai.
- An online survey was conducted in April to measure the impact of streaming viewership in Canada, Mexico, Germany, China, Brazil and UK

“National Parks Adventure” ROI Results

Economic Impact	
FY2017-2019	
Incremental Visits (Theater)	151,809
Incremental Visits (Streaming)	20,256
Incremental Visits (Total)	172,335
Visitor Spending	\$669,612,453
Total Impact (direct, indirect, induced)	\$1,520,860,857
Federal taxes generated (direct, indirect, induced)	\$105,382,509
State and local taxes generated (direct, indirect, induced)	\$94,637,237
Brand USA cash investment (production and marketing)	\$12,500,000
Return on investment	56:1

Source: Oxford Economics

“National Parks Adventure” Return on Investment

Initial Cash Investment	
Production	\$10,000,000
Distribution/Marketing	\$2,500,000
Initial Cash Investment	\$12,500,000

Sponsorship Revenue and Ticket Sales to date	
Sponsor/Source	Revenue
Ticket Sales	\$3,500,000
Sponsorships	\$6,770,000
Total	\$10,270,000

In-Kind Media Value Generated	
Source/Medium	Media Value
Contributions	\$8,170,416
Total	\$8,170,416

Initial Investment	\$12,500,000
Associated Revenue	<u>-\$10,270,000</u>
Net Cost	\$2,230,000

Visitor Spending	\$669,612,453
Effective ROI	300:1


LOS ANGELES MEMPHIS CHICAGO NASHVILLE NEW YORK NEW ORLEANS MIAMI AND MANY MORE

AMERICA'S MUSICAL JOURNEY

A story of culture, creativity and the music that shaped America

Narrated by **Morgan Freeman**

MACGILLIVRAY
FREEMAN
FILMS

 **Expedia**

 Visit
TheUSA
.com

 **AIR CANADA**

americasmusicaljourney.com

America's Musical Journey



Overview:

- *America's Musical Journey* continues to be embraced globally
- Premiere events have been attended by hundreds of luminaries including industry VIPs, press/media, mega influencers and travel trade partners

Launch events since May 2018:

- Montreal – May 7th
- Canadian Music Week – May 9th
- Paris – May 30th
- Toronto – June 18th
- Valencia – July 24th
- Lucerne – September



America's Musical Journey Global Publicity Results

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

124

Pieces of
Original
Coverage

+660MM

Earned
Media
Impressions

+\$56.6MM

Earned
Media Value

40MM

(Paid Media)

Consumer
Activation
Impressions



Go
USA

Media & Engagement (to date)



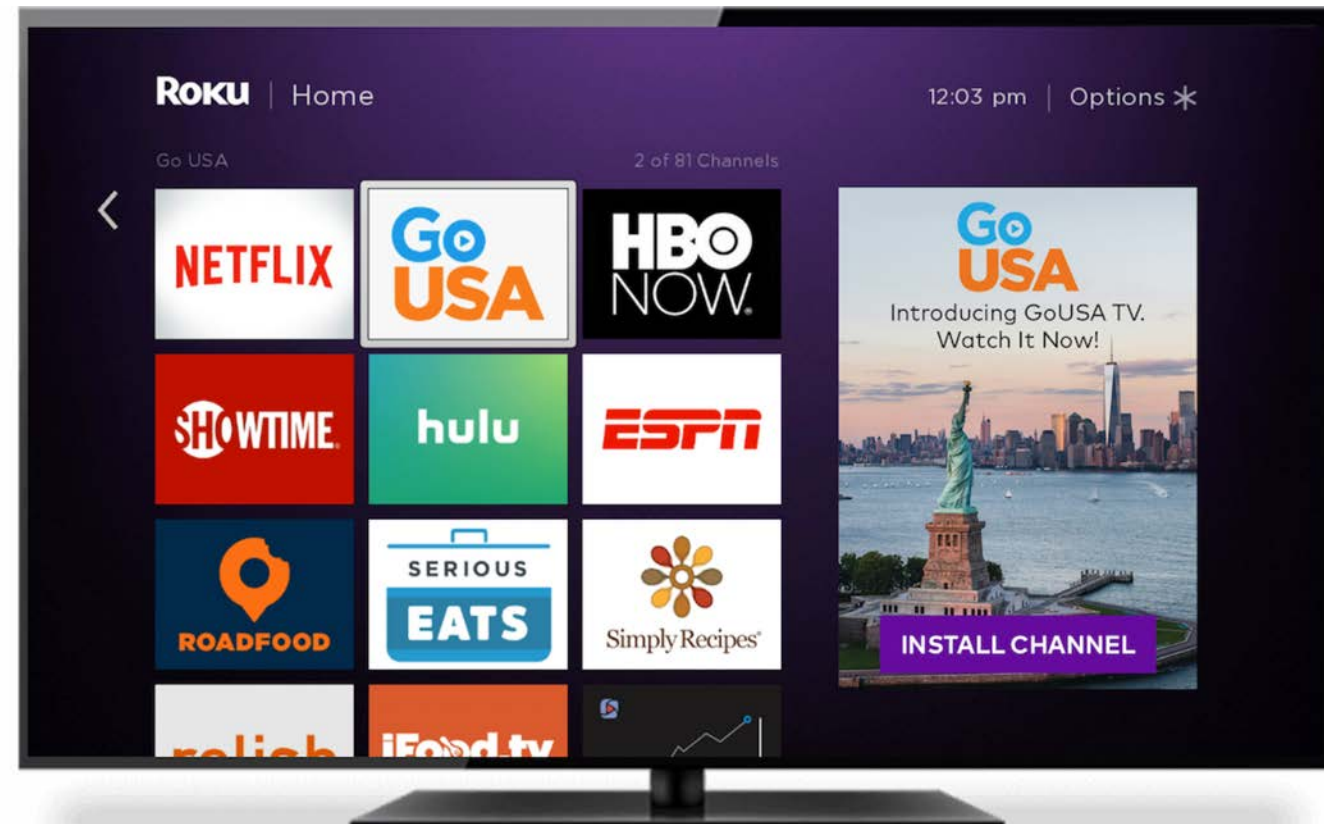
To date, engagement on GoUSA TV is significantly more robust than other platforms/channels, for similar cost

- **Content Trends**

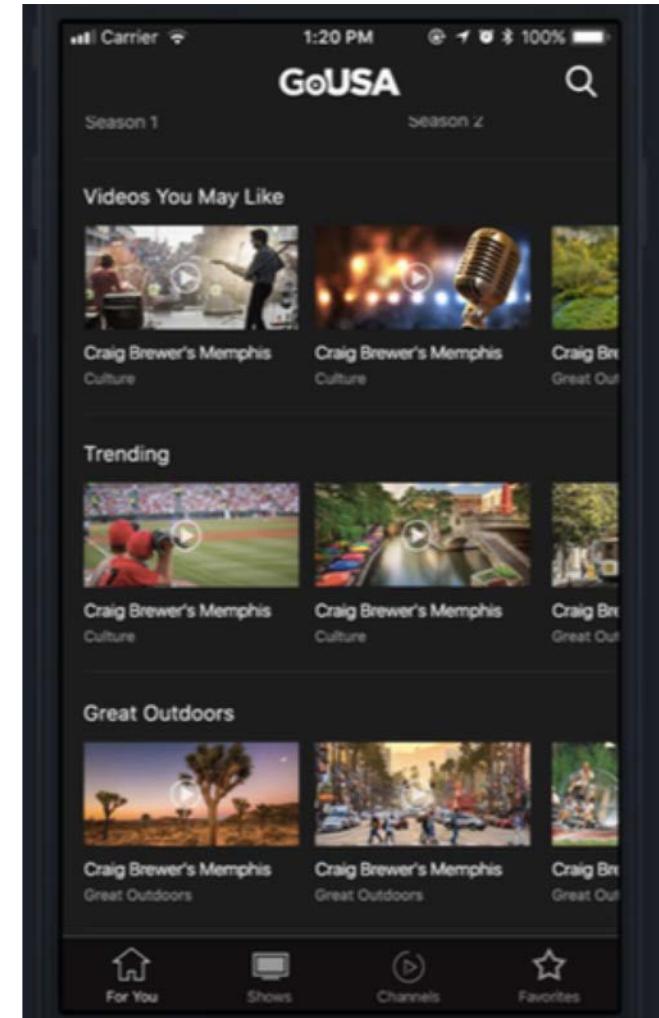
- Average views per user: 5 videos
- Average watch duration: 17:00

- **Viewership per Country**

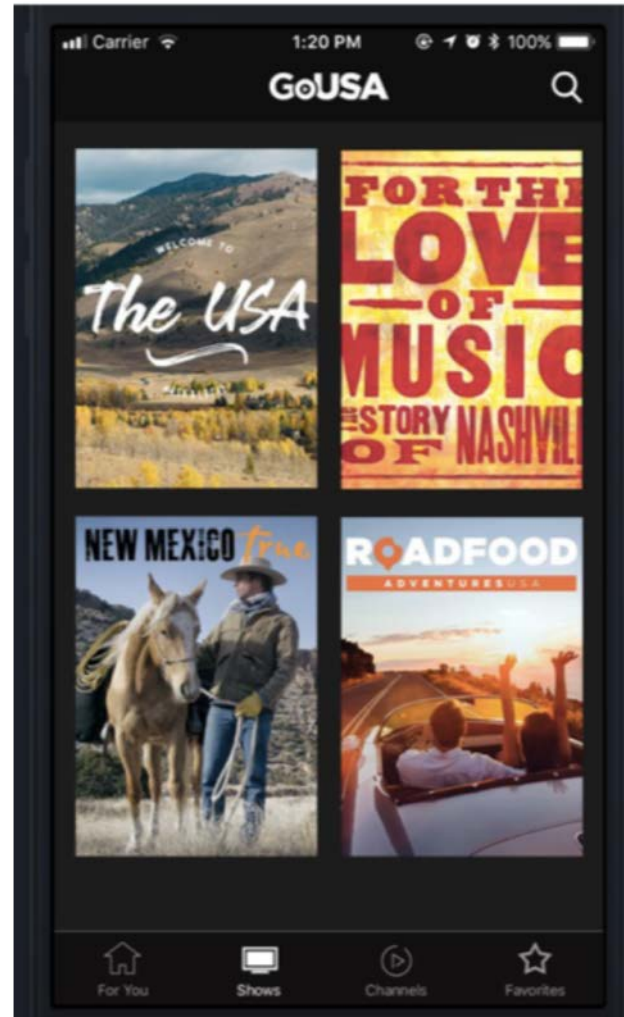
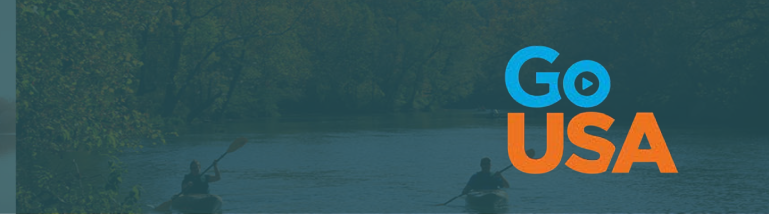
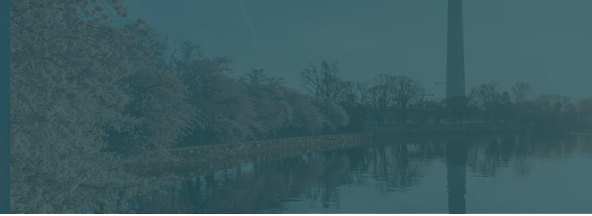
- Canada: 60%
- United Kingdom: 20%
- Mexico: 5%
- Rest of World: 15%



Mobile App



Mobile App



Official Sponsor of the NFL London Games



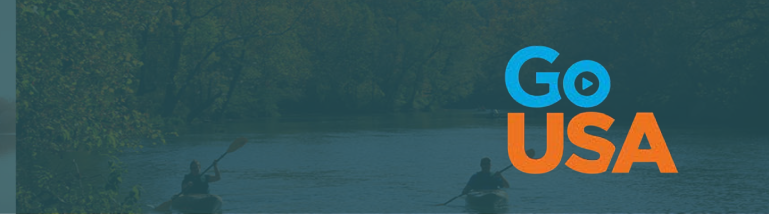
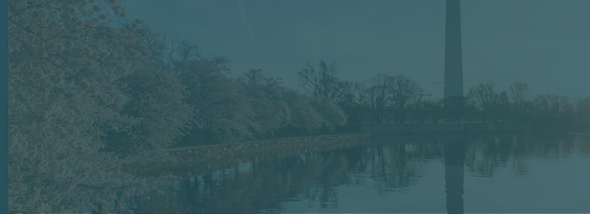
Media, activation and signage across three games:

- October 14 Seahawks v. Raiders
- October 21 Titans v. Chargers
- October 28 Eagles v. Jaguars



Creative not final

FY19 Objectives



- To get data-driven insight, we need to understand:
 - By country
 - Content performance (e.g. trending, session duration, length)
 - Content preference (e.g. genre, format)
 - Session duration
- Analyze OTT versus Mobile App installs
 - Understand usage and content consumption variations between OTT and mobile app
- Content development that supports our mission
 - Data-driven content
 - Partner & curated content
 - Licensed content
 - Program cadence to maximize audience
 - Maximize audience and grow duration



美国官方旅游网站



目的地 ▾

行程 ▾

体验 ▾

聆听音乐，体验美国风情

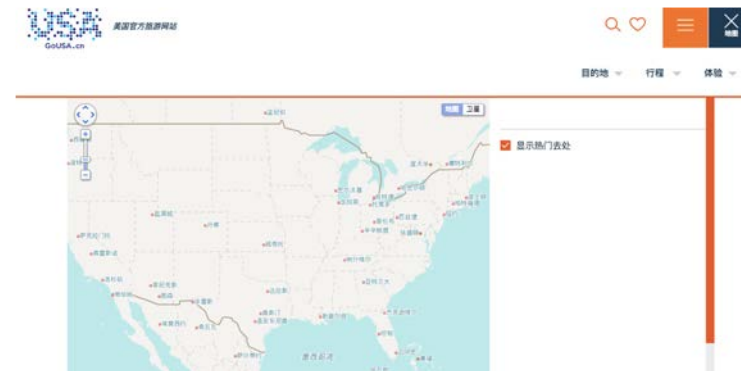
查看更多

New GoUSA.cn website for China

- Vastly expanded content: 500 new Experience & City Pages
- New Travel Tools from Mafengwo, Baidu Maps & YouKu video
- Reduces partner cost decreased from \$10k for a campaign page to \$400
- New CDN (content delivery network) to accelerate in China



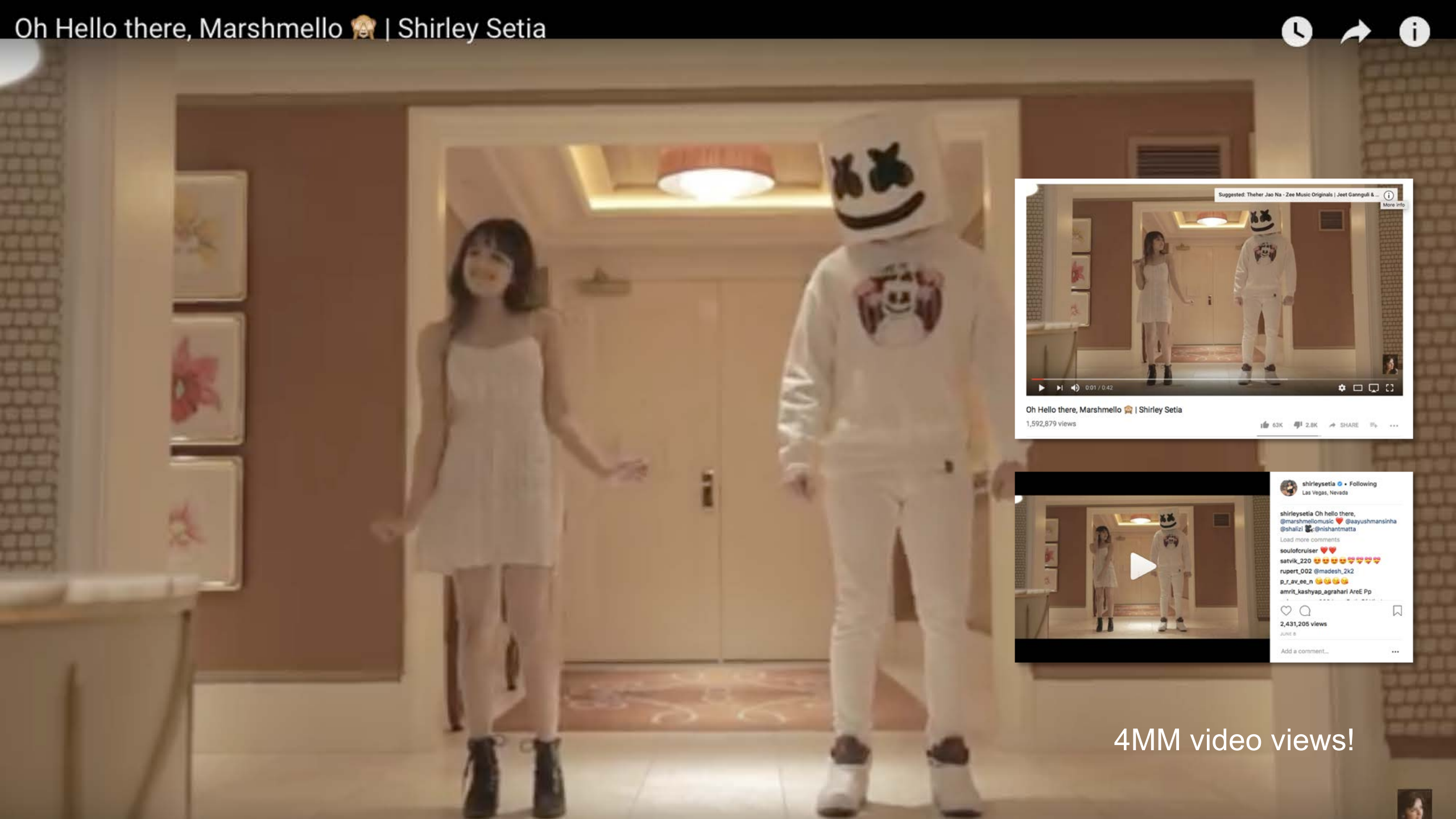
Homepage




Baidu Map



YouKu



Suggested: Theher Jao Na - Zee Music Originals | Jeet Gannguli & ... ⓘ More info



Oh Hello there, Marshmello 🐼 | Shirley Setia

1,592,879 views

👍 63K 🗨️ 2.8K ➦ SHARE ⌵ ...

shirleysetia • Following Las Vegas, Nevada

shirleysetia Oh hello there, @marshmellomusic ❤️ @aayushmansinha @shalizi 🐼 @nishantmatta

Load more comments

soulofcruiser ❤️

satvik_220 🥰🥰🥰🥰🥰🥰🥰🥰🥰

rupert_002 @madesh_2k2

p.s.av.ee.n 🥰🥰🥰🥰

amrit_kashyap_agrahari AreE Pp

👍 🗨️

2,431,205 views

JUNE 8

Add a comment...

4MM video views!

FY 18 India Influencer Campaign Overview: *Preliminary Results*

Six India Influencers to visit various locations in the USA and share their experiences to raise positive awareness about Go USA.

Shirley Setia (@ShirleySetia)



6 Instagram posts, 11 Stories
Average reach per post: 1.36M
Average views per Story: 663k

Nikhil Sharma (@Nikkkhil)



3 Instagram posts, 13 Stories

- Average reach per post: 257,887
- Average views per Story: 200k

Updated Media Dashboard & Performance Tracking

As we adopt new media platforms and strive for deeper storytelling, it's crucial that we adjust our media analytics.

What's new?

Standardized template to centralize results reporting across both brand and partner initiatives to make our reporting more consistent and available in our enterprise system (Salesforce).



Platform		Measurement	
Search	GoUSA TV OTT	Spend	Page Likes/Follows
Display	GoUSA TV app	In-Kind	Canvas Opens
Paid Social	Other Streaming	Impressions/Circulation	Video Views
On-line Video	Influencer	Page Views	Viewers
Organic Social	Broadcast TV	Shares/Retweets	Minutes Viewed
OOH	Print	Comments/Replies	Earned Media
Website	Cinema	Reactions/Favorites	Sentiment

A photograph of two cyclists riding through a dense forest. The cyclist on the left is wearing a purple long-sleeved shirt and a white helmet, while the cyclist on the right is wearing an orange long-sleeved shirt and a white helmet. They are riding on a path that is partially covered with large, green ferns. In the foreground, there is a large, moss-covered log. The background is filled with tall, thin trees and more ferns. A semi-transparent dark green banner is overlaid on the middle of the image, containing the text "QUESTIONS & ANSWERS" in white, bold, sans-serif capital letters.

QUESTIONS & ANSWERS



CLOSING REMARKS



Like/Follow/Share

Travel Industry

TheBrandUSA.com



@BrandUSA



BrandUSATV



BrandUSA

Consumer

VisitTheUSA.com



@VisitTheUSA



VisitTheUSA



VisitTheUSA



VisitTheUSA



Available on Roku,
Apple TV, and
Amazon Fire

Thank You

