Q4-FY2018
Marketing Committee Meeting

August 1, 2018
APPROVAL OF MINUTES*
GLOBAL TRADE DEVELOPMENT UPDATE
## Brand USA Travel Week – September, 2019

**BRAND USA TRAVEL EXPO**

- **One trade show**
- **300 exhibitors**
- **Educational seminar program**
- **Hosted events**
- **3 days**
- **6,600 meetings**
- **500 delegates**
- **Inspirational speakers**
- **Sponsorship opportunities**
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
• 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
• 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
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
PARTNER MARKETING UPDATE
<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY18 In-kind Revenue</td>
<td>$55.39 million</td>
</tr>
<tr>
<td>FY18 Cash Contributions</td>
<td>$45.61 million</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$101.00 million</td>
</tr>
</tbody>
</table>
HEAR THE MUSIC
EXPERIENCE THE USA.
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
“National Parks Adventure” ROI Study
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

<table>
<thead>
<tr>
<th>Economic Impact</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Incremental Visits (Theater)</strong></td>
<td>151,809</td>
</tr>
<tr>
<td><strong>Incremental Visits (Streaming)</strong></td>
<td>20,256</td>
</tr>
<tr>
<td><strong>Incremental Visits (Total)</strong></td>
<td>172,335</td>
</tr>
<tr>
<td><strong>Visitor Spending</strong></td>
<td>$669,612,453</td>
</tr>
<tr>
<td><strong>Total Impact (direct, indirect, induced)</strong></td>
<td>$1,520,860,857</td>
</tr>
<tr>
<td><strong>Federal taxes generated (direct, indirect, induced)</strong></td>
<td>$105,382,509</td>
</tr>
<tr>
<td><strong>State and local taxes generated (direct, indirect, induced)</strong></td>
<td>$94,637,237</td>
</tr>
<tr>
<td><strong>Brand USA cash investment (production and marketing)</strong></td>
<td>$12,500,000</td>
</tr>
<tr>
<td><strong>Return on investment</strong></td>
<td>56:1</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
“National Parks Adventure” Return on Investment

<table>
<thead>
<tr>
<th>Initial Cash Investment</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Production</td>
<td>$10,000,000</td>
</tr>
<tr>
<td>Distribution/Marketing</td>
<td>$2,500,000</td>
</tr>
<tr>
<td>Initial Cash Investment</td>
<td>$12,500,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsorship Revenue and Ticket Sales to date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor/Source</td>
</tr>
<tr>
<td>Ticket Sales</td>
</tr>
<tr>
<td>Sponsorships</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Media Value Generated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source/Medium</td>
</tr>
<tr>
<td>Contributions</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

- Initial Investment: $12,500,000
- Associated Revenue: -$10,270,000
- Net Cost: $2,230,000
- Visitor Spending: $669,612,453
- Effective ROI: 300:1
A story of culture, creativity and the music that shaped America

Narrated by Morgan Freeman

americasmusicaljourney.com
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

124
Pieces of Original Coverage

+660MM
Earned Media Impressions

+$56.6MM
Earned Media Value

40MM
(Paid Media)
Consumer Activation Impressions
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

GoUSA
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
• 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
聆听音乐，体验美国风情
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
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)

Nikhil Sharma (@Nikkkhil)

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

3 Instagram posts, 13 Stories
- Average reach per post: 257,887
- Average views per Story: 200k
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).

<table>
<thead>
<tr>
<th>Platform</th>
<th>Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>GoUSA TV OTT</td>
</tr>
<tr>
<td>Display</td>
<td>GoUSA TV app</td>
</tr>
<tr>
<td>Paid Social</td>
<td>Other Streaming</td>
</tr>
<tr>
<td>On-line Video</td>
<td>Influencer</td>
</tr>
<tr>
<td>Organic Social</td>
<td>Broadcast TV</td>
</tr>
<tr>
<td>OOH</td>
<td>Print</td>
</tr>
<tr>
<td>Website</td>
<td>Cinema</td>
</tr>
</tbody>
</table>

- Spend: Page Likes/Follows
- In-Kind: Canvas Opens
- Impressions/Circulation: Video Views
- Page Views: Viewers
- Shares/Retweets: Minutes Viewed
- Comments/Replies: Earned Media
- Reactions/Favorites: Sentiment
CLOSING REMARKS
Thank You

Like/Follow/Share

Travel Industry
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BrandUSATV
BrandUSA

Consumer
VisitTheUSA.com
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VisitTheUSA
VisitTheUSA

Available on Roku, Apple TV, and Amazon Fire