Approval of Minutes
Brand USA Travel Week – September 9-13, 2019
Brand USA Travel Week

• What:
  ▪ Travel Expo
  ▪ Enrichment Series
  ▪ Consumer Engagement

• When:
  ▪ September 9 – 13, 2019 London

• Where:
  ▪ Etc Venues County Hall
  ▪ Located in Westminster, next to the iconic London Eye on the Southbank of the Thames

• Price to attend:
  ▪ $4,950 per single exhibitor
  ▪ $1,000 per additional delegate (max of one additional delegate)
Sponsorship Opportunities

Partnership opportunities will offer suppliers and destinations significant exposure to key influencers in the tourism industry.

**Sample Sponsorship Packages**

- Venue Branding
- Food Immersion Takeovers
- Seminar Sponsorships
- Executive Leadership Seminar
- Sustainable Promotional Collateral
- Event Guide
- Evening Events
- Entertainment
- Digital Marketing
- Podcasts
Delegates from Europe will be travelling to London for Brand USA Travel Week. In association with affiliate partners, the show will be looking to offer special rates and hosted accommodation with the following hotels:

- London Marriott Hotel County Hall
- Park Plaza County Hall Hotel London
- Park Plaza Westminster Bridge Hotel London
- Premier Inn County Hall London
### Partner Revenue 2018

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY18 In-kind Revenue for Match</td>
<td>$62.3 million</td>
</tr>
<tr>
<td>FY18 Cash Contributions</td>
<td>$46.7 million</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$109 million</strong></td>
</tr>
</tbody>
</table>

*subject to change, financial review due October 29*
### Total LOA Participations in Programs

<table>
<thead>
<tr>
<th>Program Type</th>
<th>FY17</th>
<th>FY18</th>
<th>Pct. Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Kind (Market Specific)</td>
<td>83</td>
<td>150</td>
<td>80.72%</td>
</tr>
<tr>
<td>Owned (Brand USA Originals)</td>
<td>499</td>
<td>564</td>
<td>13.03%</td>
</tr>
<tr>
<td>Trade</td>
<td>23</td>
<td>70</td>
<td>204.35%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>605</td>
<td>784</td>
<td>29.59%</td>
</tr>
</tbody>
</table>

- Compared with FY17, in FY18 there were approximately 30 percent more partner participations in programs.

*The report is based on available data in Salesforce. It does not showcase the Global Trade Tradeshows.*
Top 20 Programs in Terms of Partner Participation

Across all 54 FY18 programs, on average there were 19 participations per program.

295 partners participated in the top 20 programs for partner participation.

360 partners participated across all the the 54 FY18 programs.

*Data includes both contributing LOA partners and additional participations in all programs except Affinity, General Media, and Sales Missions.
FY18 Destination Partner Participation Analysis (in Brand USA Originals – many are state wide co-ops)

State Participation

- Illinois
- Visit Florida*
- Kentucky
- Louisiana
- Visit California
- Arizona
- Alabama
- Michigan
- New York
- Oregon

*Data is from the Miles Salesforce and does not include the full range of Brand USA program participations.

*Non-LOA
FY18 Partner Participation Analysis (Brand USA and Market Specific Programs)

City Participation

- Chicago
- San Diego
- St. Petersburg/Clearwater
- Fort Lauderdale
- Fort Myers
- Kissimmee
- Naples*
- New Orleans
- Tampa Bay
- Detroit

*Non-LOA

*Data is from the Miles Salesforce and does not include the full range of Brand USA program participations.
Global Trade Development
<table>
<thead>
<tr>
<th>Market</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td><strong>New</strong> Regional Director (Jan 2018)</td>
</tr>
<tr>
<td>Mexico</td>
<td><strong>New</strong> Regional Director (Jan 2018)</td>
</tr>
<tr>
<td>China</td>
<td><strong>New</strong> Regional Director (Apr 2018)</td>
</tr>
<tr>
<td>Germany/Austria/Switzerland/Netherlands</td>
<td><strong>New</strong> company. Hills Balfour. Pan-European approach (Jan 2018)</td>
</tr>
<tr>
<td>France/Belgium/Luxemburg</td>
<td><strong>New</strong> office. Hills Balfour. Pan-European approach (Jan 2018)</td>
</tr>
<tr>
<td>Italy</td>
<td><strong>New</strong> office. Hills Balfour. Pan-European approach (Jan 2018)</td>
</tr>
<tr>
<td>Spain</td>
<td><strong>New</strong> office. Hills Balfour. Pan-European approach (Jan 2018)</td>
</tr>
<tr>
<td>Market</td>
<td>Coverage</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Canada</td>
<td>New Regional Director: Expected Hire Q1-FY019</td>
</tr>
<tr>
<td>South Korea</td>
<td>RFP FY2019. Expect completion by Feb 2019</td>
</tr>
<tr>
<td>China</td>
<td>RFP FY2019. Expect completion by Feb 2019</td>
</tr>
<tr>
<td>Japan</td>
<td>RFP FY2019. Expect completion by May 2019</td>
</tr>
<tr>
<td>Hong Kong/Taiwan/Singapore</td>
<td>RFP FY2019. Expect completion by May 2019</td>
</tr>
</tbody>
</table>
2018 Activities Recap

- 16 Roadshows
  - 241 Destination Represented
  - 4,073 Travel Agents
- 13 International Offices / Covering 23 Markets
  - Conducted 5,732 Sales Calls
- 2,643 New travel agents registered for the USA Discovery Program

- 17 Trade Shows
  - 2,006 Appointments
  - 720 Destinations Exhibited
- 4 Sales Missions
  - 5,099 Appointments
  - 140 Destination Partners
- 18 Product Fams
  - 54 Destinations
  - 1,084 Product Managers
Integrated Consumer Marketing
Communication Architecture
Incorporate and build on our foundational value proposition (proximity), competitive edge (possibility) and tone (welcome).

Create urgency and provoke “travel dreaming” by highlighting first person perspectives of locals, expert influencers and travelers alike.

Open access and lend authenticity to our communications, as well as create a sense that there are many United States.

I...and in so doing, achieve more organic, authentic, locally relevant, positive and cost effective engagements with consumers.
Many Voices and Content Ecosystem
Many Voices

is a social media and content communications platform which aims to create more meaningful connections with potential travelers, stimulating curiosity and wanderlust by leveraging a collection of voices which define the story of the USA.

We are the USA. A collection of places, of experiences whose spirit is found in its diverse range of people. We aim to guide you, to show you that **behind every landscape, big city and open road there are many voices who can stimulate your wanderlust.**
Who are the Many Voices?

**LOCALS**
A place is defined by its people, by those who have explored its culture, roads and trails like no other. They’ve made their mark on their community and can welcome you, inspiring you to visit like no other.

**VISITORS**
They’ve fulfilled their wanderlust, they’ve checked their bucket list and created memories which can now be used as inspiration for the next iteration of travellers from their market. To travel is to know and the past visitor now becomes the storyteller and the evangelist for travel to the USA.

**CATEGORY EXPERTS**
Whether you’re an aspiring explorer, reading National Geographic, dreaming of your chance to conquer the Grand Canyon, or a foodie looking for inspiration from the pages of Saveur, planning your next culinary journey to LA - travellers often look to category experts to inspire their travel decisions. We will use them to guide our community.

**CREATIVE CLASS**
Not everyone looks at America in the same way. Interpretations can be found in music, art, and unique takes on photography and video. We want to amplify these creative voices to show America as it hasn’t been seen before. This creative perspective can come from locals, visitors or category experts.
Inspirational content themes can be overlaid on new and existing programs.

- Friendship
- Self discovery
- Falling in love
- Adventure
- Achievement

Sense of place
Some of the most memorable travel moments are the ones which begin with a human connection. It’s the conversation with a barista which leads us to a hiking trail not found in any guide book, or the musician who points you to the best diner for local cuisine. Those authentic, off-script, true experiences are what the USA is all about. And it’s connections with welcoming locals that bring the real America to life.

The spirit of America is the sound of jazz pouring onto the streets of New Orleans, or the honky tonks of Tennessee. It’s the live music capitals of Austin or Las Vegas, and the festivals which bring together the masses. Its culture, art and history are preserved in the museums, theatres and art galleries of New York, Chicago or D.C. It is a country which invites you to hear, see and experience the USA.

Exploration is an outlook, not an action. It is a personal travel journey, which ranges in experiences. It is a hiker, trekking through some of America’s wild spaces, or an urban explorers multisensory journey through America’s cities. Exploration is a platform which embodies the American spirit - a spirit of trailblazers, innovators and self-discovery.
Visit The USA Platform Ecosystem
Screen Strategy & Storytelling Platforms

- Mobile
- Laptop/Desktop
- Smart TV
- Digital OOH
- Giant Screen
Global Campaigns
HEAR THE MUSIC
EXPERIENCE THE USA.
Hear The Music is a musical journey featuring 10 artists from 10 cities covering 2 classic American songs – “Boogie Shoes” and “What I like About You” - while exploring the sights, flavors and hidden gems of the cities which have inspired their unique music perspectives.

TENTATIVE CAMPAIGN LAUNCH
January: Organic Social and Web Site launch
February: UK, France, Germany, Canada, Australia, South Korea
March: Brazil, Japan
April: China

WHERE WE’LL BE: West Hollywood; Owensboro; Detroit; Chicago; New Orleans; Miami; Las Vegas; Austin; Minneapolis; Mississippi

MUSIC CAMPAIGN ECOSYSTEM
In addition to Hear The Music and American Sound – the broader Brand USA ecosystem will feature content which ladders back to the music vertical through a varied approach inclusive of content partners (Beautiful Destinations) and influencers.

MEASURING SUCCESS
Video Views
Website Visits
GO USA TV Views/Downloads
Increased Affinity (FB Brand Lift Study)
Hear the Music Campaign Ecosystem

**Trade** will create unique itineraries inspired by the artists’ POV.

**Social** will execute a video-first strategy with sequential targeting to help tell the full story.

**Web** will host a robust music hub.

**PR** will leverage key moments such as the Telegraph event and artist media interviews.

**Go USA TV** will house longer-form American Sound Episodes.

**Sponsorships** with Spotify and other local activation partners (e.g., Visa, Virgin) will penetrate the market.
Cities, Genres, Artists and Songs

“What I Like About You”
- Austin - Dr. Joe - Rock
- Minnesota - Lady Lark - Pop
- Chicago - Mike Ledbetter - Blues
- Kentucky - The Wooks - Blue Grass
- Miami - Xperimento - Latin Fusion

“Boogie Shoes”
- Mississippi - Cedric Burnside - Blues
- West Hollywood - Kat Meoz - Rock n Roll
- Detroit - Omar Arragone - Hip Hop
- New Orleans - Robin Barnes - Jazz/Soul
- Las Vegas - Frankie - Sinatra
In year 2 of *America’s Musical Journey*, we will not only continue our IMAX roll out into new markets that have yet to receive the film, we will also look to expand theatrical distribution in certain markets and launch streaming, OTT and airline distribution in others.

**MUSIC CAMPAIGN ECOSYSTEM**

Similar to our other music campaigns, our *AMJ* launches will be supported by our broader music content initiatives that will live across our digital and platform ecosystem that will include our *Hear The Music/American Sound* campaign, *Musical Cities* content series and influencer campaigns around music.

**KEY TENTATIVE LAUNCH DATES**

- **November**: Australia
- **December**: Mexico Cinepolis Launch
- **March**: Germany
- **April**: Brazil
- **May**: China
- **September**: India, OTT, Streaming

**MEASURING SUCCESS**

- Film viewership
- Trailer viewership
- Earned media reach
- Ticket revenue
- Partner engagement
We’ve already seen the power our giant screen documentaries have to drive travel to the United States. The launch of the GoUSA TV channel is an extension of that strategy to immerse audiences in an entertainment-led point of view of the USA. GoUSA gives us the space to create, curate, and collaborate on the production of content so we can better harness the power of entertainment to get people to actively consider a USA destination for their next vacation.

LAUNCH TACTICS
Introduce the GoUSA TV app by sampling content through multiple touchpoints including sponsorships, consumer and trade PR and paid social advertising.

CAMPAIGN TIMELINE
October 14: Soft launch at NFL London Games
November 5: UK, Canada, Mexico, Canada, Australia
Mid-November: IPW Daily

MEASURING SUCCESS
Video Views
Promotional and In-app Installs/Downloads
Minutes watched
Content analysis
OTT vs App

Key Programming: Spirit Song, Ask a Local, Lost and Hungry
Programming cadence: New programs/episodes uploaded every Thursday, unless specific launch
New and Next: Exploration
EXPLORING WILD AMERICA

When the first courageous people came here, they didn’t know what they would find. But they came, using their wits to make their own way. Today, we still go out into the unknown. Even with all her great cities, America is still a place where the great outdoors lies waiting for the next explorer. Exploring Wild America (WT) a giant screen film, brings to life trails and trailblazers by sharing stories of the great outdoors, the discovery of some new cities, and people who overcame failure and found a way to bring their dreams to life. America has always been a wide open, and diverse place; culturally and geographically.
MacGillivray Freeman’s
EXPLORING WILD AMERICA
A FILM FOR GIANT SCREEN THEATRES
Thank you for joining us