



Q1-FY2019 Marketing Committee Meeting

November 14, 2018





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.

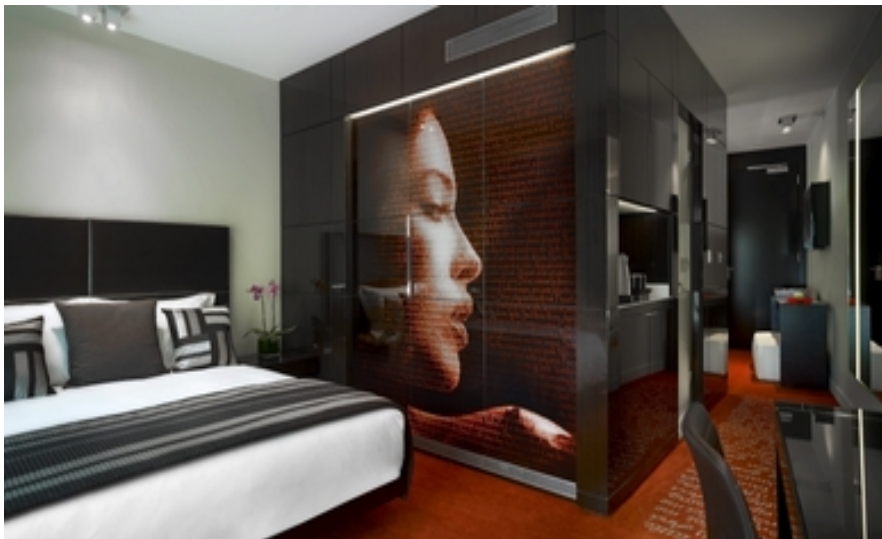
Sample Sponsorship Packages

- Venue Branding
- Food Immersion Takeovers
- Seminar Sponsorships
- Executive Leadership Seminar
- Sustainable Promotional Collateral
- Event Guide
- Evening Events
- Entertainment
- Digital Marketing
- Podcasts

Host Accommodation Hotels

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



A scenic landscape photograph featuring a couple sitting on the edge of a large, flat rock formation that juts out over a valley. The woman is lying on her stomach, and the man is crouching next to her, looking at a smartphone. The background shows a vast expanse of rolling mountains under a sky with soft, colorful clouds, suggesting a sunset or sunrise. The foreground is filled with lush green foliage.

Partner Marketing – 2018 Year End Summary

Partner Revenue 2018

FY18 In-kind Revenue for Match	\$62.3 million
FY18 Cash Contributions	\$46.7 million
TOTAL	\$109 million

*subject to change, financial review due October 29

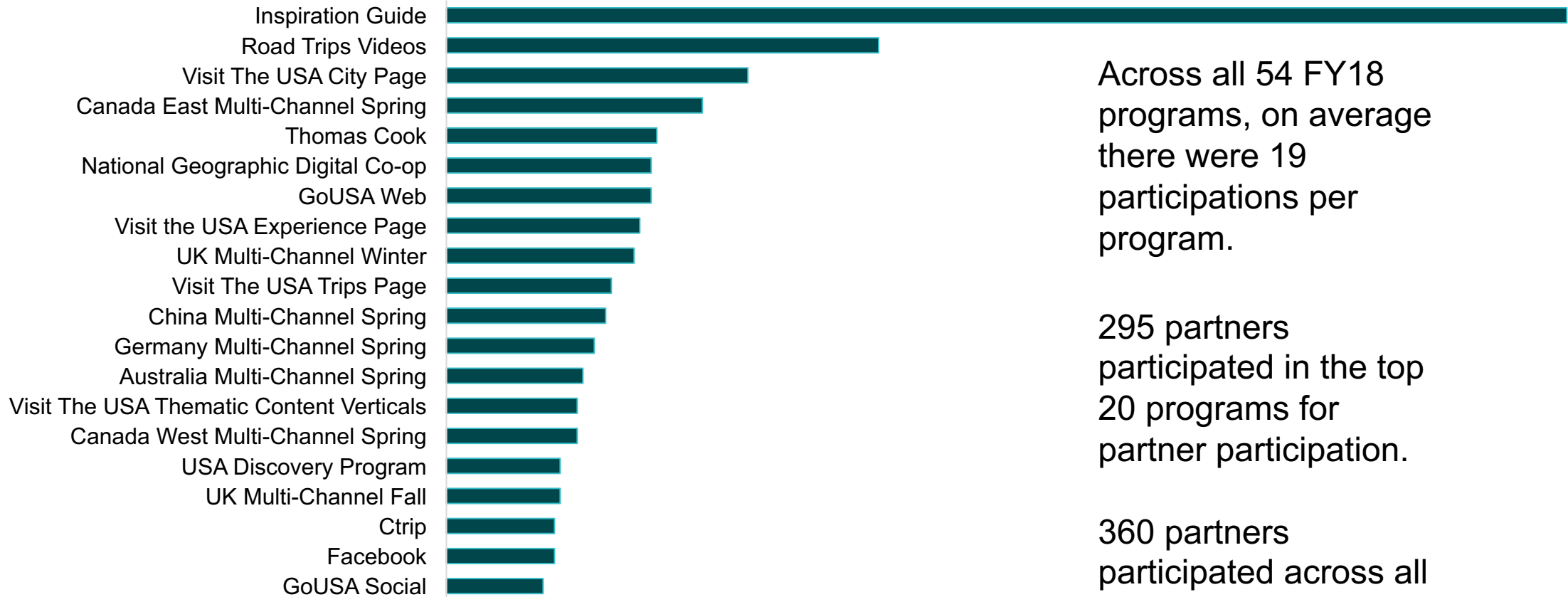
Total LOA Participations in Programs

Program Type	FY17	FY18	Pct. Change
In-Kind (Market Specific)	83	150	80.72%
Owned (Brand USA Originals)	499	564	13.03%
Trade	23	70	204.35%
TOTAL	605	784	29.59%

- 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.

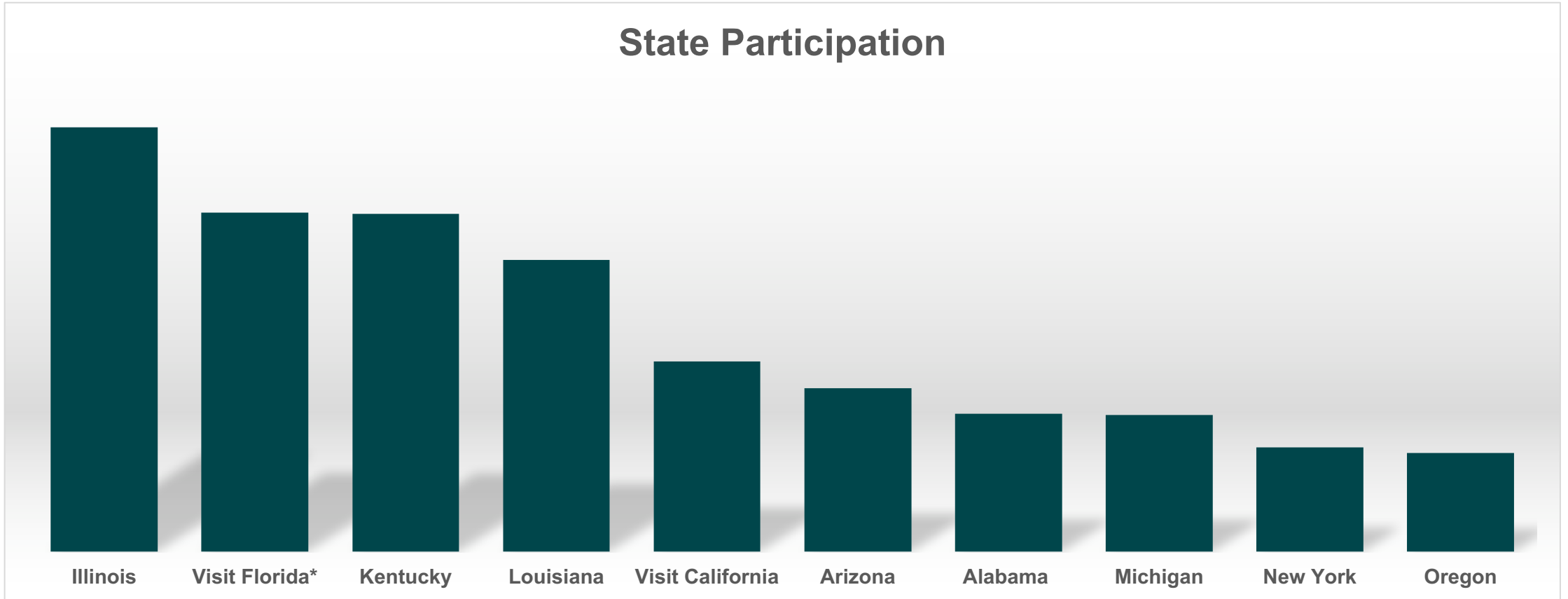
*Data includes both contributing LOA partners and additional participations in all programs except Affinity, General Media, and Sales Missions.

2018 Destinations Participating with Brand USA



FY18 Destination Partner Participation Analysis (in Brand USA

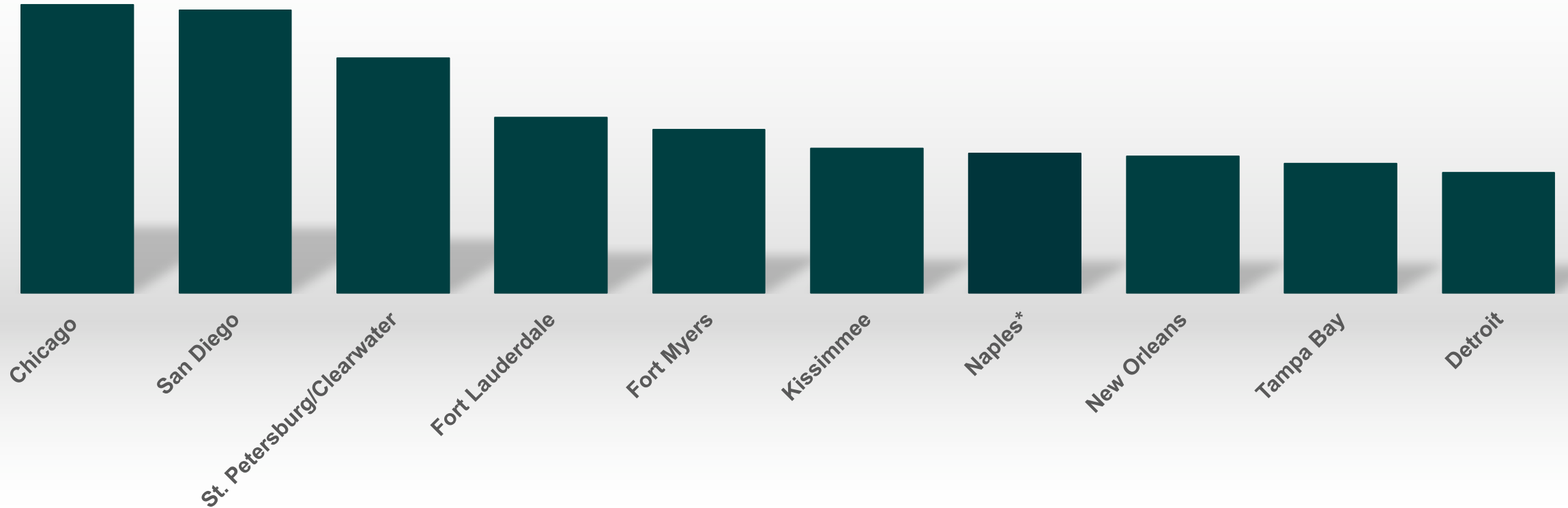
Originals – many are state wide co-ops)



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

FY18 Partner Participation Analysis (Brand USA and Market Specific Programs)

City Participation



*Non-LOA

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



Global Trade Development



FY2018 Global Footprint

International Representation

Market	Coverage
Canada	New Regional Director (Jan 2018)
Mexico	New Regional Director (Jan 2018)
China	New Regional Director (Apr 2018)
Germany/Austria/Switzerland/Netherlands	New company. Hills Balfour. Pan-European approach (Jan 2018)
France/Belgium/Luxemburg	New office. Hills Balfour. Pan-European approach (Jan 2018)
Italy	New office. Hills Balfour. Pan-European approach (Jan 2018)
Spain	New office. Hills Balfour. Pan-European approach (Jan 2018)

International Representation

Market	Coverage
Canada	New Regional Director: Expected Hire Q1-FY019
South Korea	RFP FY2019. Expect completion by Feb 2019
China	RFP FY2019. Expect completion by Feb 2019
Japan	RFP FY2019. Expect completion by May 2019
Hong Kong/Taiwan/Singapore	RFP FY2019. Expect completion by May 2019

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



FAVORITES

- * COLD BREW COFFEE
- * ICED CHAI LATTE
- * VAN. CHOC. CAR FRAPPE

WE ALSO SERVE \$2 TACOS

MENU

ITEM	PRICE
15 MIN COLD BREW	3.50
VIETNAMESE DRESSING	4.00
POUR OVER	2.50
THAI ICED TEA	3.50
FLAVORED STRIPS	1.50
FRAPPE	4.25
PERKY CHOCOLATE	4.00
ICED MOCHA	3.50
AMERICANO	2.00



ROCKY'S

Global Positioning Statement

Our content strategy will focus on curating individual voices that each express a particular point of view, to enable us to...

Give a voice to **real** travel **experiences** within the USA

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.

Incorporate and build on our foundational **value proposition** (proximity), **competitive edge** (possibility) and **tone** (welcome).

...and in so doing, achieve more organic, authentic, locally relevant, positive and cost effective engagements with consumers.

A woman with dark curly hair, wearing a light-colored blazer, is sitting on a black office chair at a white cafe counter. She is smiling and looking towards the camera. The background features a rustic interior with wood-paneled walls, a stone wall, a clock, a framed collage of postcards, and a shelf of books. A large bouquet of colorful flowers is on the counter. A semi-transparent teal banner with white text is overlaid on the image.

Many Voices and Content Ecosystem

The Many Voices Platform

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

FY19: Content Themes



Q1/Q2 Local Perspectives

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.



Q2/Q3 Arts & Entertainment

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.



Q4 Exploration

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 multi-sensory 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



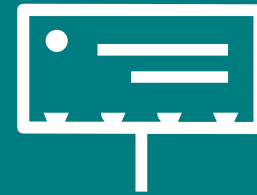
Mobile



Laptop/Desktop



Smart TV



Digital OOH



Giant Screen

Global Campaigns



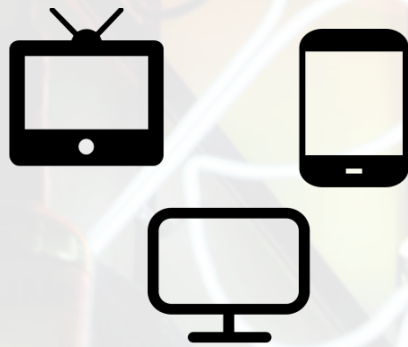


HEAR THE MUSIC
EXPERIENCE THE USA.



Hear the Music 2.0

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.



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.



TENTATIVE CAMPAIGN LAUNCH

January: Organic Social and Web Site launch

February: UK, France, Germany, Canada, Australia, South Korea

March: Brazil, Japan

April: China



MEASURING SUCCESS

Video Views

Website Visits

GO USA TV Views/Downloads

Increased Affinity (FB Brand Lift Study)

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

Hear the Music Campaign Ecosystem



Trade will create unique itineraries inspired by the artists' POV



Web will host a robust music hub



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



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



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

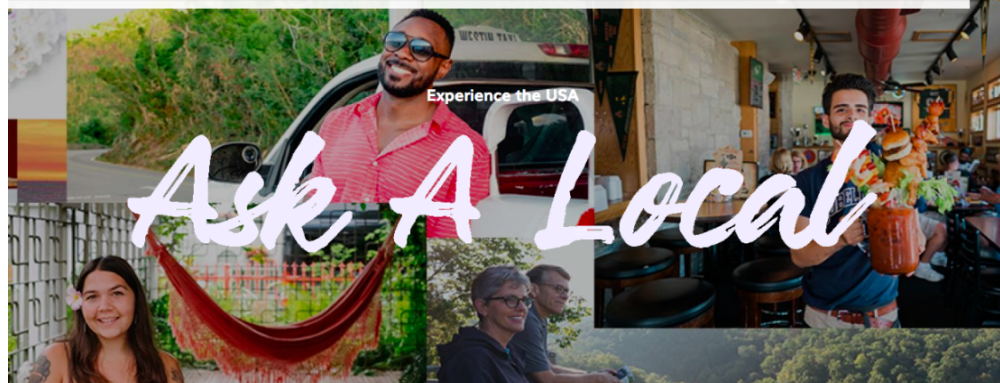
Detroit - Omar Arragone - Hip Hop

New Orleans - Robin Barnes - Jazz/Soul

Las Vegas - Frankie - Sinatra



Ask a Local



Explore all videos

From beaches to bike trails to breweries, the United States has something for everyone to explore. Hear from the locals themselves and discover the best attractions, places to eat, shopping and much more.

ASK A LOCAL

Brand USA's digital asset management system contains photography, video, and other resources for the promotion of travel to and within the USA. Resources are available to media, Brand USA partners, and agencies.

[Click here to learn how your destination can be featured](#)

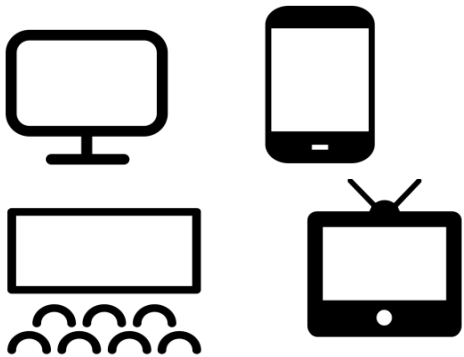
Search "Ask a Local" videos... LOCATION

- ASK A LOCAL: St. Petersburg and Clearwater, Florida
- ASK A LOCAL: Wichita, Kansas
- ASK A LOCAL: Mall of America, Minnesota
- ASK A LOCAL: U.S. Virgin Islands
- ASK A LOCAL: Houston, Texas
- ASK A LOCAL: Black Hills, South Dakota
- ASK A LOCAL: Bend, Oregon
- ASK A LOCAL: Las Vegas, Nevada
- ASK A LOCAL: Miami and Key West, Florida
- ASK A LOCAL: Sioux Falls, South Dakota
- ASK A LOCAL: Portland, Oregon
- ASK A LOCAL: Oregon



America's Musical Journey

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 Cinopolis
Launch
March: Germany
April: Brazil
May: China
September: India, OTT, Streaming



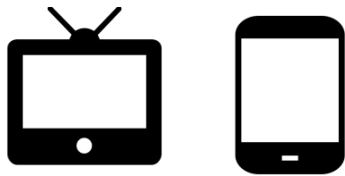
MEASURING SUCCESS

Film viewership
Trailer viewership
Earned media reach
Ticket revenue
Partner engagement

GoUSA TV

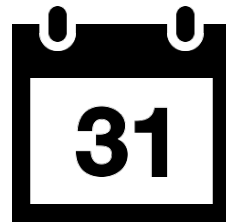
Because every place has a story

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

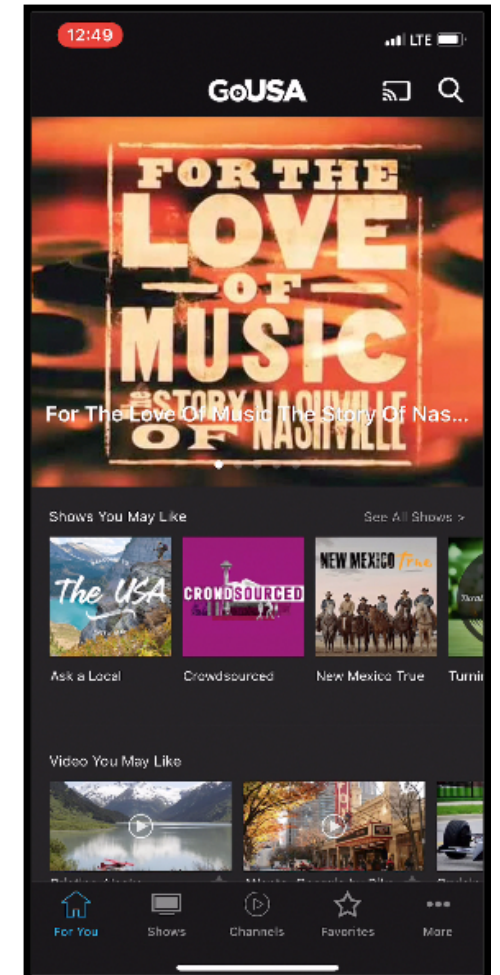


MEASURING SUCCESS

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





Spirit Song

A person is rowing a boat on a body of water. The water is dark blue with ripples. In the background, there is a misty or foggy landscape with trees and hills. The sky is a pale, hazy color, suggesting dawn or dusk. The person's hand is visible, holding a wooden oar. The boat's edge is also visible on the right side.

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



Questions & Answers



Thank you for joining us

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Roku
Apple TV
Amazon Fire
and
associated apps

