



# Brand USA

# FY19 Q2 Marketing Committee Meeting

# March 12, 2019





# Opening Remarks





The background of the slide is a photograph of Antelope Canyon, showing the smooth, undulating, and layered walls of the slot canyon in warm orange and red tones. Light filters through the narrow openings, creating a dramatic play of light and shadow. A dark teal horizontal band is positioned across the middle of the image, serving as a background for the text.

# Approval of Minutes\*





# CMO Update





# 2019 Marketing Roundtables

- Brand USA's Marketing Roundtables have evolved
- 2019 participants:
  - 13 CMO Roundtable
  - 14 Global Trade Development Roundtable
  - 19 Partner Programs Roundtable
  - 11 Corporate Communications Roundtable
- Highly engaged group of participants
- In-depth conversations about relevant topics
- Valuable experience for all of our stakeholders as a networking and sharing of best practices moment
- Participants want more research and more information from ALL areas of Marketing
- Looking for ways to better facilitate this opportunity
- **SAVE THE DATE! 2020 Marketing Roundtables: January 28-30**





# Brand USA Travel Week: September 9-13, 2019



# Brand USA Travel Week: September 9–13, 2019

- Brand USA Travel Week will be an immersive, celebration of the United States that will showcase the diverse range of travel experiences available in the United States.
- Taking place in central London, the three components of Brand USA Travel Week are:
  - Brand USA Travel Expo – B2B event
  - Enrichment Series
  - Consumer Event

## Price

- \$4,950 per single exhibitor
- \$1,000 per additional delegate (max of one additional delegate)







# Stakeholder Engagement Efforts



# Stakeholder Engagement Efforts: FY2019 Priorities

Having successfully developed a diverse set of partners and stakeholders, we are now moving in to the next phase of partner development. Starting in FY19, we've widened our partner development effort to address the needs of a broader group of Brand USA stakeholders. This includes primarily destination partners (state and city DMOs/CVBs) with whom we have previously had limited engagement.

- **GOAL**

- Increase the number of touch points with stakeholders who are either barely engaged or not at all engaged with Brand USA
- Educate stakeholders on the value of international marketing, the Brand USA value proposition and various ways to engage with us

- **TACTICS**

- Road Trips: visit at least 20 partners per trip
- Webinars
- “Coffee Chats” with stakeholders at IPW, ESTO, Destinations International conferences, and governor’s conferences
- Attend more governor’s conferences, even for destinations which are not currently engaged in international tourism

- **KPI**

- By the end of FY2019, we will have touched 750 stakeholders





# Focus on India



# About India



- 65% of India's population is under 35 years old
- 35% of population is urban; 12% speak English (highest English speaking population outside of the U.S.)
- Approx. 250K Indians make more than \$1M a year (ranks third highest country in number of billionaires)



- India has **500 million Internet users (2<sup>nd</sup> highest number of users in the world)**
- Expected 730 million internet users by 2020; 3X growth in smart phone users



- 22 official languages
  - Mediacom noted **Gujarati and Punjabi-speaking audiences are most likely to prioritize travel to USA**; Hindi-speaking audience is keen to explore
- Pan-India campaign should be in English; some local campaigns in key regions should be in regional language



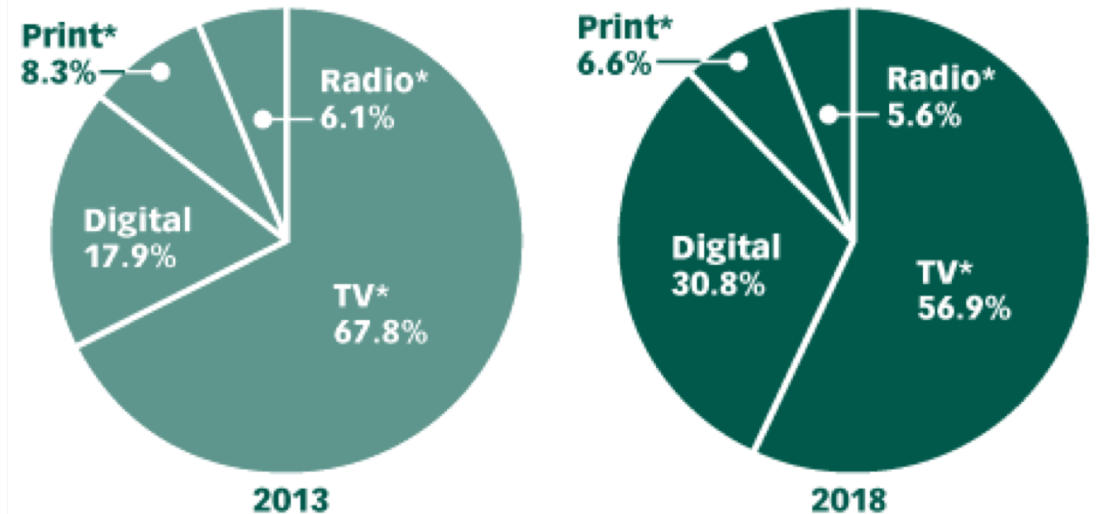
- 18% of traveling population prefers international destinations
- DMOs have tapped into local interests around Bollywood, cricket, and cooking
- **In Tier 3 markets, face-to-face interaction works best for booking.** Within these markets, combination payments, including cash payments, are common
- Expected to be the third-largest Aviation market by 2020; **20 cities will have 2 airports by 2030**; 1,000 new aircrafts are being ordered in the next 7-8 years



# India and the Media

- Fastest growing ad spend - 12.9 % vs. Asia at 3.9% and U.S. at 2%
- Traditional media: TV and print consumes 70% of time
- TV is #1 and Digital #2
- Print, Radio, OOH, and cinema – best local
- On-line video and streaming television - very important

**Share of Average Time Spent per Day with Major Media by Adults in India, 2013 & 2018**  
*% of total*



Source: eMarketer, June 2018



# Marketing Efforts in India: 2019-2020

- Enhance USA Discovery Training Program
- Educate Partners on the value of the Indian market
- Develop India readiness programs
- Create co-op programs for partners
- Brand USA Travel Week – India: Fall 2020
- Work with leading OTAs
- OTT platforms
- Media Marketing Mission
- Still launching *National Parks Adventure*
- Launching *America's Musical Journey*
- Launched GoUSA TV and Go USA TV App – India has highest engagement on mobile app
- Influencer strategy



# Global Trade Development Activities in India: 2019-2020

## October 01-February 15 and looking forward, 2019

- **Partnership with MTV India Music Week, October 12-14:** India Music Summit works on a platform to conserve, celebrate and recreate the rich musical diversity of traditional Indian music and musicians. This was an opportunity to showcase America's musical tradition.
- **Destination Seminars for Travel Trade: 9 cities – pan-India, 11 U.S. partners, December – February 2019** – Delhi, Ahmedabad, Pune, Chandigarh, Kolkata, Bengaluru, Chennai, Hyderabad, Mumbai
- **Travel Trade Coops with 2 pan-India tour operators: Travel Tours & Cox & Kings, Feb– April, 2019 4 U.S. partners**
- **Training Webinar, pan- India, April 17, 2019:** Target of over 1000 agents/tour operators
- **Travel Trade Fam for Product Managers, May 24-31, 2019:** pre-IPW fam targeting Arizona and Utah
- **Brand USA corporate workshop for key MICE operators, June 26 & 27:** Mumbai & New Delhi
- **EPEX 2019, June 27-29, 2019:** Brand USA presence at one of largest business platforms for MICE & Incentive travel



# Integrated Marketing





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

**Create urgency and provoke “travel dreaming”** by highlighting first person storytelling & perspectives

**Lend authenticity** to our communications, as well as creating a sense that there are many United States

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

Our content strategy will focus on curating individual voices that each express a particular point of view and place of interest.





# Our Many Voices Platform

**Take the scenic route. Stop for storytellers. Search for the best piece of pie.  
Sing your heart out. Relax. Enjoy.**

We are the USA. A collection of places and experiences whose spirit is found in its diverse range of people. We're here to guide you, to help you discover that behind every mountain, every skyscraper, whether on the fast lane or a country road, there are many voices who are happy to show you around.



# Who Are The Many Voices?



## LOCALS

**A place is defined by those who live there,** who have explored its culture, roads and trails like no other and can welcome and inspire.



## VISITORS

To travel is to know and **the past visitor now becomes the storyteller** and the evangelist for travel to the USA.



## CATEGORY EXPERTS

**Travelers look to category experts like journalists, hoteliers, cabbies** and others to inspire their travel decisions. We will use them to guide our community.



## CREATIVE CLASS

We will amplify creative voices to **show America as it hasn't been seen before** via musicians, writers, photographers, artists and poets.



# Screen Strategy & Storytelling Devices



Mobile



Laptop/Desktop



Smart TV



Digital OOH



Giant Screen

“From mobile to giant screen and everything in between”



# Consumer Programs FY19-20





**B** BEAUTIFUL  
DESTINATIONS

UNITED  
STORIES







# #UNITEDSTORIES

We are a nation of **Many**, not of few.

We are a collective, a hodgepodge of faces, races, religions, beliefs, and stories. We are a fabric that is woven together by our uniqueness — one that champions our differences, and one that honors our past as a country of immigrants.

We are a nation of many. **Many Voices**, that is. Voices that have stories, sayings, interests, thoughts, and purposes that **connect** us all.

We are a nation physically connected by the roads, highways, byways, waterways, and thoroughfares that crisscross this great country — roads that sometimes lead us to new adventures and sometimes reconnect us with old friends or loved ones.

Yes, we are all connected, and it is our stories that help define us and show the world that the doors are open and adventure is just one **road trip** away.



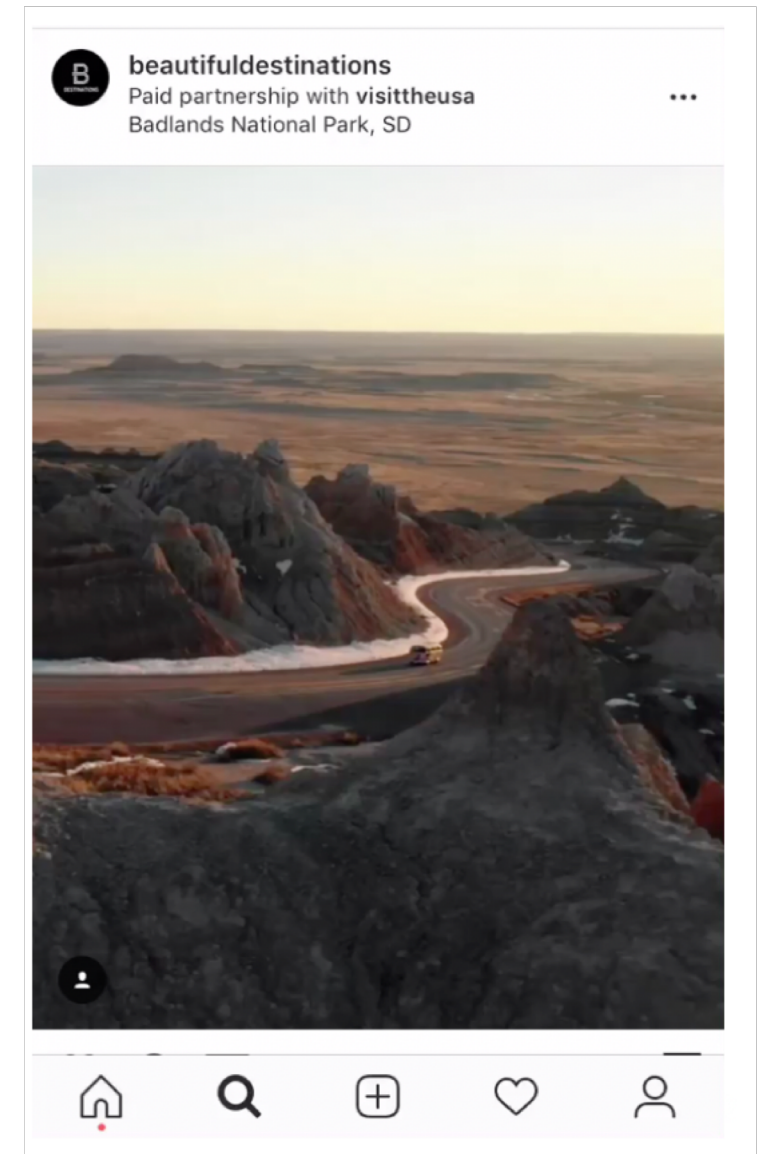
# The Mobile Content Lab

Each month, we will send a minimum of **two** cars in various locations across the USA to find unique stories to inspire and drive international visitation to the U.S.

Each vehicle will double as a mobile unit that our teams can travel in, and also serve as a **hotspot** to any onlooker. The cars will also be leveraged to support earned media opportunities hosting journalists, influencers and podcasters.

A robust content hub will track where the car has been and display in-depth content of each destination it travels to:

[www.VisitTheUSA.com/UnitedStories](http://www.VisitTheUSA.com/UnitedStories)







BEAUTIFUL  
DESTINATIONS



VisitTheUSA.com

PRESENT



# #UnitedStories Artist Partnership





*United Stories*

# THE LAUNCH

The United Stories campaign launched in South Dakota in January 2019. Eight international influencers joined the Brand USA and BD teams for an epic 3-day journey to American icons across South Dakota, such as Mount Rushmore and Badlands National Park. The Brand USA PR team garnered press coverage of the trip and follow up interviews from international media with a total of over 3.4 UVM.







*United Stories*

# THE TRIP

Eight international influencers traveled to South Dakota for a 3 day trip to explore:

- Badlands National Park
- Mount Rushmore
- Custer State Park
- Belle Fourche
- Spearfish Canyon





*United Stories*

# SOUTH DAKOTA SOCIAL TOTALS

1,775,012

Engagements

Including BD post , and Visit The USA posts and Stories, Influencer posts, and the @Instagram post.

238

Posts and Stories

Including coverage from influencers, BD, and Visit The USA.

232

Hashtag Mentions

During the trip, the #UnitedStories hashtag was picked up by the general public who follow the influencers and want to get involved.

16,177,952

Accumulative Story Segment Views (Reach)

Including reach of Visit The USA, influencers, and BD.

75,150,346

Organic Impressions

Including influencer posts and Stories, BD post and Stories, and Visit The USA posts and Stories, and the @Instagram post.

11,263,328

Paid Social Impressions

From one post and one Story ad on Instagram.







*United Stories*

# WHERE WE'VE BEEN

November: **Alaska** and **Hawaii**

December: **Vermont** and **Miami**

January: **South Dakota** and **Arizona**

February: **Nashville** and **Memphis**

# WHERE WE'RE HEADED

March: **Austin, Puerto Rico and Marfa, Texas**

April: **Asheville, NC, Virginia and Washington, D.C.**

May: **Ohio, California and TBD**

June: **New York City (World Pride), Maine, New Mexico and IPW**

July: **Utah and Montana**

August: **50th Anniversary of Woodstock/Hudson Valley, NY and Civil Rights Trail**

September: **Massachusetts/Cape Cod and Oklahoma**

October: **Louisiana and TBD**



An aerial photograph of a tropical coastline. In the foreground, dark, turbulent ocean waves are crashing against a dark, pebbly beach. To the left, a rocky cliff face is visible, with white foam from the waves cascading down its side. The background features a lush green landscape with dense vegetation and a single palm tree standing prominently on the right. The overall scene is captured from a high angle, looking down at the coastline.

# Hilo, Hawaii





**HEAR THE MUSIC**



# Cities, Genres, Artists, and Songs



## What I Like About You

Austin - Dr. Joe - Rock

Minnesota - Lady Lark - Pop

Illinois - 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

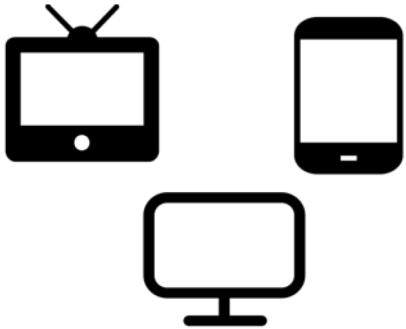
Las Vegas - Frankie - Sinatra





# Hear the Music 2019

Expanding on the success of our 2018 campaign, Hear The Music 2.0 is a musical journey featuring 10 artists from 10 cities covering two 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

- Launching in 11 international markets
- Assets include: Social, OLV, OTT episodes, Website Hub, Spotify Integration



## CAMPAIGN LAUNCH

- **February 11:** Organic Social and Web Site
- **February:** AU, CA, DE, FR, KR, UK
- **March:** BR, JP
- **April:** CN

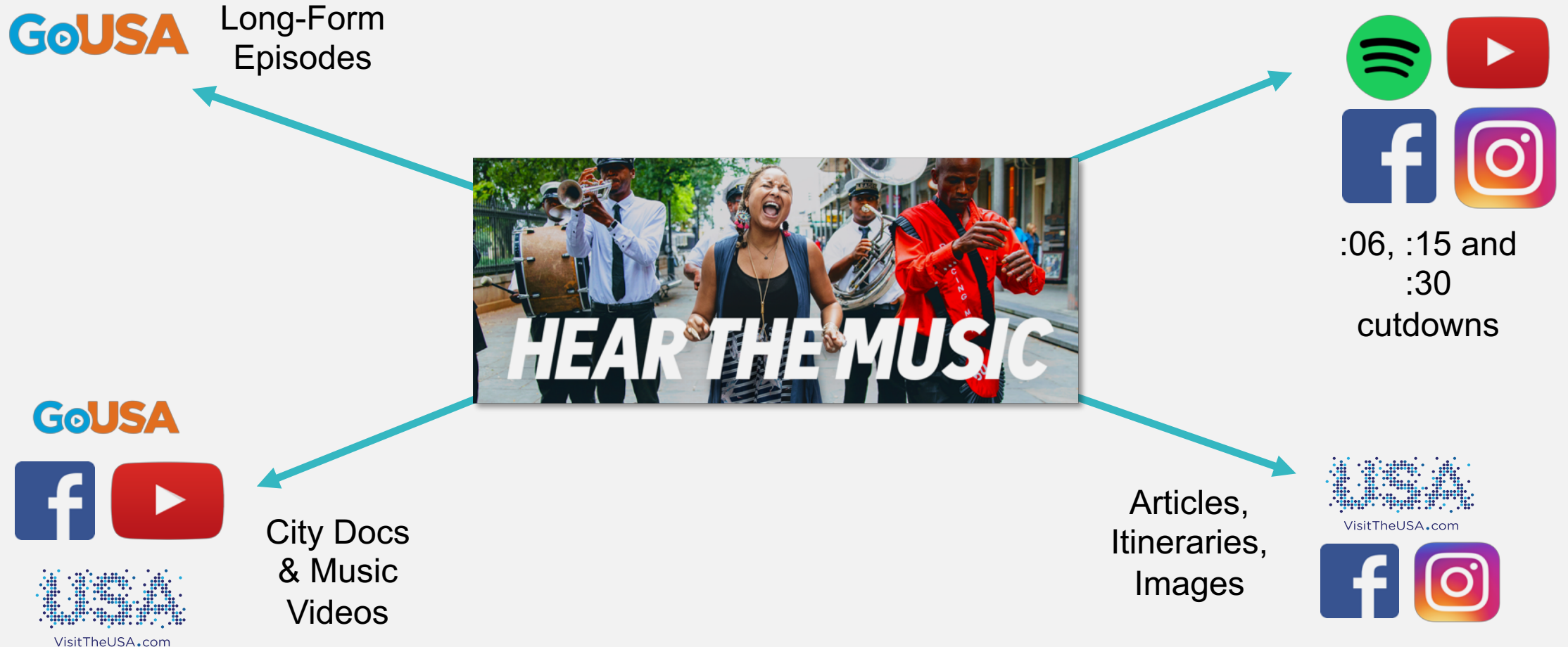


## MEASURING SUCCESS

- Video Views
- Website Visits
- GO USA TV Views/Downloads
- Increased Affinity (FB Brand Lift Study)



# Hear the Music Campaign Ecosystem





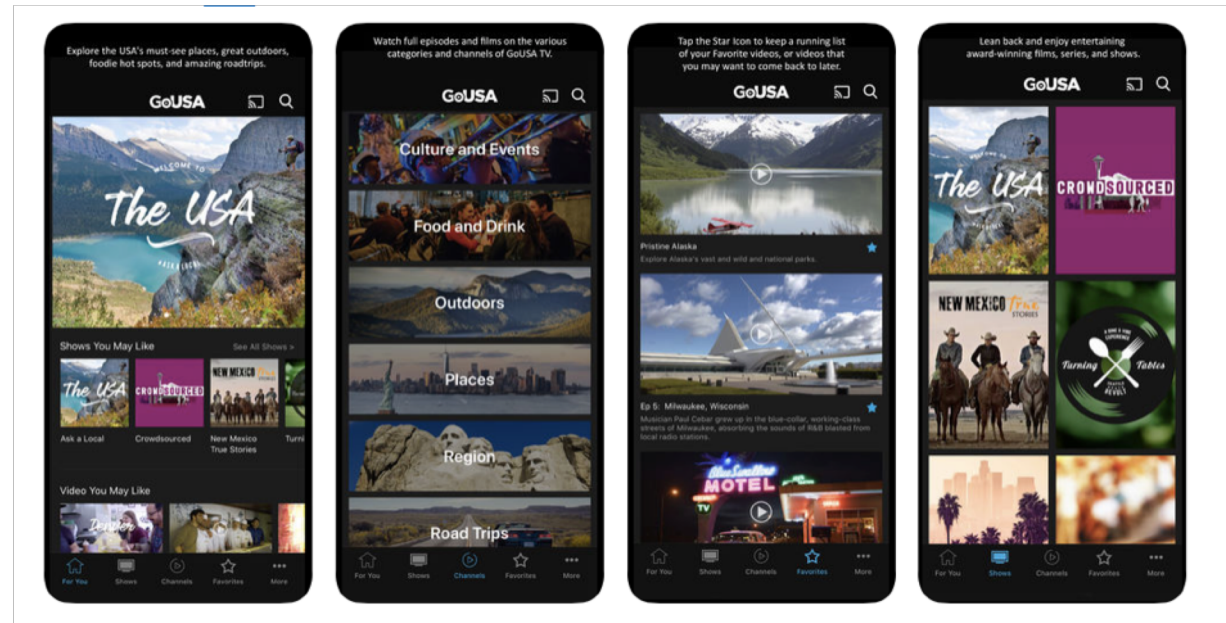
The logo for GoUSA TV features the word "Go" in blue, "USA" in orange, and "TV" in a smaller orange font. The letter "o" in "Go" is stylized with a white play button icon inside a blue circle.

**GoUSA<sub>TV</sub>**

**Because every place has a story.**



Connected TV



Mobile App



# Connect w/Travelers on GoUSA TV

*Because every place has a story.*

Introducing the new GoUSA TV. The premier travel entertainment channel, available at your fingertips with no subscription, no fees and no logins required.

Watch full episodes, documentaries and films, told from the diverse perspectives of real people across America.

Download. Escape. Explore. GoUSA TV.

# Visit The USA Digital Ecosystem

The elements in our **multi-screen, video storytelling** strategy create a positive inspiration feedback loop that delivers the right content to the right consumer in the right place.



## Giant Screen Films

Immerse audiences in feature-length documentaries to help discover the U.S. from an unbranded point of view

*Emotional narratives inspire further destination investigation*



## Social

Focus on thumb-stopping, snackable content



## Website

Portal for self-directed discovery of destinations and itineraries



## Connected TV & Mobile App

Curating emotional narrative experiences with a distinct sense of place

*Expand on information led media with emotional narratives*



## Chatbot

Personalize wanderlust and discovery of U.S. possibilities





# Narrative-Based Storytelling



Friendship



Self  
discovery



Falling in  
love



Adventure



Achievement

**Sense of place**

# On Now & Coming Soon!





# It's Early Days

## OTT (launched February 2018)

- ~80% of installs were international
  - 95% of installs were on Roku
- 61% of video views were international
  - Most video views came from US (followed by CA, MX, UK)
- Average watch duration of 33.39 Minutes per user (Global)
  - UK: 40.23 average minutes per viewer
  - MX: 23.19 average minutes per viewer
  - CA: 52.68 average minutes per viewer

## Mobile App (launched November 2018)

- ~89% of installs were International
  - 85% of installs were on Google Play
- 86% of video views were international
  - Most video views came from India (followed by US, UK, MX, AU, CA)
- Unsurprisingly, shorter videos perform better than longer ones on the mobile app
  - This is also a trend we see in China, where videos < 10 minutes and episodic content perform well on mobile

Note: As of 12.31.18

# Follow Us!



#VisitTheUSA

#UnitedStories

#RoadTripUSA

#MusicUSA





A woman with long dark hair, wearing a white t-shirt and glasses, is seen from behind, holding a smartphone to take a photo of a long, brightly lit corridor. The corridor is lined with tall, red columns and has a red ceiling. The floor is made of light-colored stone tiles. Sunlight streams in from the end of the corridor, creating long shadows. A series of small, round, white lanterns hang from the ceiling. On the right side, there is a framed picture on the wall. A semi-transparent dark teal banner with white text is overlaid on the left side of the image.

# Questions & Answers





# Closing Remarks & Adjourn Meeting





**Travel Industry**  
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BrandUSATV



BrandUSA

**Consumer**  
**VisitTheUSA.com**



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VisitTheUSA



VisitTheUSA



VisitTheUSA

**GoUSA**TV

Roku  
Apple TV  
Amazon Fire

# THANK YOU

