



Q2 Marketing Committee Meeting

February 20, 2018





OPENING REMARKS

USA
VisitTheUSA.com

Brand USA



Item 1: APPROVAL OF MINUTES

USA
VisitTheUSA.com

Brand USA



Item 2: CMO REPORT



2018 Marketing Roundtables Update: January 22-24 in Washington DC

The Brand USA Marketing Roundtables consist of the CMO Roundtable, the Partner Programs Roundtable, and the Global Development Roundtable

- Established to enable partners to provide valuable input to Brand USA on strategic marketing initiatives.
- Participants include leaders from a cross-section of the industry:
 - CMO Roundtable: 12 partners
 - Partner Marketing Roundtable: 15 partners
 - Trade Development: 7 partners
- Meetings Focus:
 - Marketing Strategy for 2018
 - Media Efficiencies
 - Social Media/Influencer Integration
 - Co-op Partner Programs
 - Tradeshows and Road Shows
 - Working with the In-Market Reps
 - Tour Operator Collaboration and Product Development



2018 Marketing Roundtables Update: January 22-24 in Washington DC

Focus:

Add and Create Value

Pioneer cooperative marketing platforms and programs that leverage and grow the USA brand in ways our partners would be challenged or unable to do on their own

Affirmation, Input, Discovery

- Strategic disruption and leadership
- Innovative changes to the standard industry model
- Examples:
 - Trade shows
 - Regional directors
 - International representation
 - Co-op marketing in emerging markets
 - Consumer marketing



A scenic landscape featuring a couple sitting on a rocky cliff edge, looking out over a vast, hazy mountain range under a blue sky with soft clouds. The foreground shows lush green foliage.

Item 3: GLOBAL TRADE DEVELOPMENT UPDATE

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Global Trade Update

January 2018

- Travel Trade Site Launched
- Onboarded Canada, Mexico, Europe, Australia/New Zealand Representation Firms
- Fitur
- Marketing Roundtables

February 2018

- Namaste Event in Mumbai and Delhi, India
- China Regional Director RFP Interviews
- BIT Milan
- Visit USA/Brand USA Road Show in Australia
- Brand USA Discover America Expos in New Zealand

March 2018

- Showcase USA-Italy
- Discover America Denmark
- ITB Berlin
- China Sales Mission



Namaste
USA 2018



International Representation – Regional Directors

- **Regional Directors:**

- **Report to the Vice President, Global Trade Development**
- **Assist in the development and execution of in-market strategy plan**
- **Coordinate the efforts of all trade, marketing and public relations agencies in-market**

- **Currently contracted:**

- **Mexico: Lourdes Berho, Alchemia**
- **Canada: Karly Melo, TimeZoneOne**
- **Europe:**
 - **Regional Director - Sam Hancock, Hills Balfour**
 - **Strategic Directors:**
 - **Florian Renner (Leib) – Germany, Austria, Switzerland & the Netherlands**
 - **Julie Geoffroy (Interface France) – France, Luxembourg & Belgium**
 - **Javier Fernandez (Interface Spain) – Spain**
 - **Marcella Re (Interface Italy) – Italy**

- **In process - China**

International Representation RFP: Markets Update

Completed and Contracted

- Brazil
- India
- The UK & Ireland
- Australia & New Zealand
- Canada
- Mexico
- Europe
 - Italy, Spain
 - France, Belgium, Luxembourg
 - Germany, Austria, Switzerland, the Netherlands

In Process

- China Regional Director
- China
- South Korea
- Japan
- Hong Kong
- Taiwan
- Singapore



A wide-angle photograph of the Golden Gate Bridge in San Francisco, California. The bridge's iconic red-orange towers and suspension cables are prominent against a backdrop of the city skyline and the bay. The sky is overcast with soft, grey clouds. In the foreground on the right, the back of a person's head and shoulder is visible, looking out towards the bridge. A semi-transparent teal banner is overlaid across the middle of the image, containing the text 'Item 4: PARTNER PROGRAMS UPDATE'.

Item 4: PARTNER PROGRAMS UPDATE

USA

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Brand USA Originals: Multi-Channel FY2017 Results

9 markets, 12 campaigns
232 partners participated

- Nearly 228MM Impressions across Facebook & GDN
- Over 945,000 Clicks to Partner content on Facebook
- Average CTR of .77% - nearly 10X over industry average on GDN, 938,000 clicks to partner
- \$40.7 Million in Gross Bookings post view/click attributed to campaign
- 5 million print inserts distributed
- *In China –*
 - *4B impressions*
 - *2.9MM page views on gousa.cn*
 - *11,230 USA Itineraries booked, 60% increase for Qin Travel*



A night landscape featuring a starry sky with the Milky Way galaxy visible. Below the sky, a forested valley is illuminated by warm lights, suggesting a town or resort. The foreground shows a dense forest of evergreen trees.

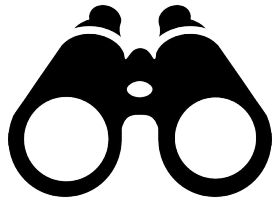
A FOCUS ON CHINA: Capturing Share

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Alibaba – Fliggy: Singles Day 2017 Summary

Largest single sales-day event on the globe 11/11



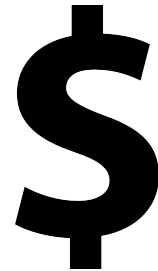
218,973,151

TOTAL IMPRESSIONS



243,805

TOTAL
TRANSACTIONS



\$42,412,679

TOTAL
SALES GENERATED



55x

TOTAL
RETURN ON INVESTMENT



1,416,557

ENGAGEMENT

156,872,383

IMPRESSIONS
(Fliggy Campaign Page
USA Entry Banner)

62,100,768

IMPRESSIONS
(Other Fliggy Media
Resources)

- **\$770,000** investment, the campaign resulted in a **55x return on investment**.
- **56%** more users participated in the campaign because of the large selection of products and the awareness of Single's Day campaign.
- **35%** more revenue was generated compared to 2016.
- **16%** more impressions was reached compared to the planned impression of 187,949,764.

Brand USA Contributing Partner Performance

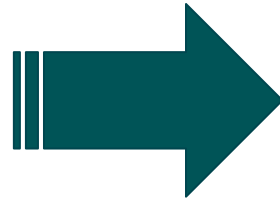
HAWAII, SAN DIEGO, SAN FRANCISCO, LAS VEGAS, MICHIGAN, DISNEY



27,379
TRANSACTIONS



\$10,319,434
TOTAL SALES GENERATED



15.9x

avg. return on investment for contributing partners

11.2%
of all transactions

24.3%
of all US travel sales

FLIGGY USA CAMPAIGN PAGE PERFORMANCE

Launched USA Pavilions and Guidebooks in China

Objectives:

Investing in a brand pavilion service allows Brand USA to develop brand content and better connect with Chinese travelers and build an umbrella for all USA destinations and product.

- Build a coherent brand image to establish USA as a premier travel destination.
- Drive engagement by developing accessible travel content to stimulate Chinese travelers' aspirations.
- Simplify users' research process on desktop by structuring USA and all sub-destinations (states/cities) for a more user-friendly homepage design.
- Distinguish the USA from other popular destination competitors on these three platforms.
- Promote unique travel experiences of USA to broader Chinese travelers.



50,378,390

YTD IMPRESSIONS FY2018



162,156,342

YTD IMPRESSIONS FY2018



4,337,384

YTD IMPRESSIONS FY2018

Pavilions



Desktop Version



Mobile App Version



Desktop Version



Mobile App Version





Item 5: INTEGRATED MARKETING UPDATE

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Media Planning Evolution & Measurement



FY2017 Media Objectives

- **Support new consumer websites**
 - Increase page views and session duration
 - Drive efficient cost per net view
- **Establish new consumer campaign**
 - **Raise awareness and drive consideration**
 - Increase CTR and completed video views
 - Focus on mass reach for awareness messaging
- **Social first**
 - **Drive engagement with "always on" messaging**
 - Content and storytelling are key



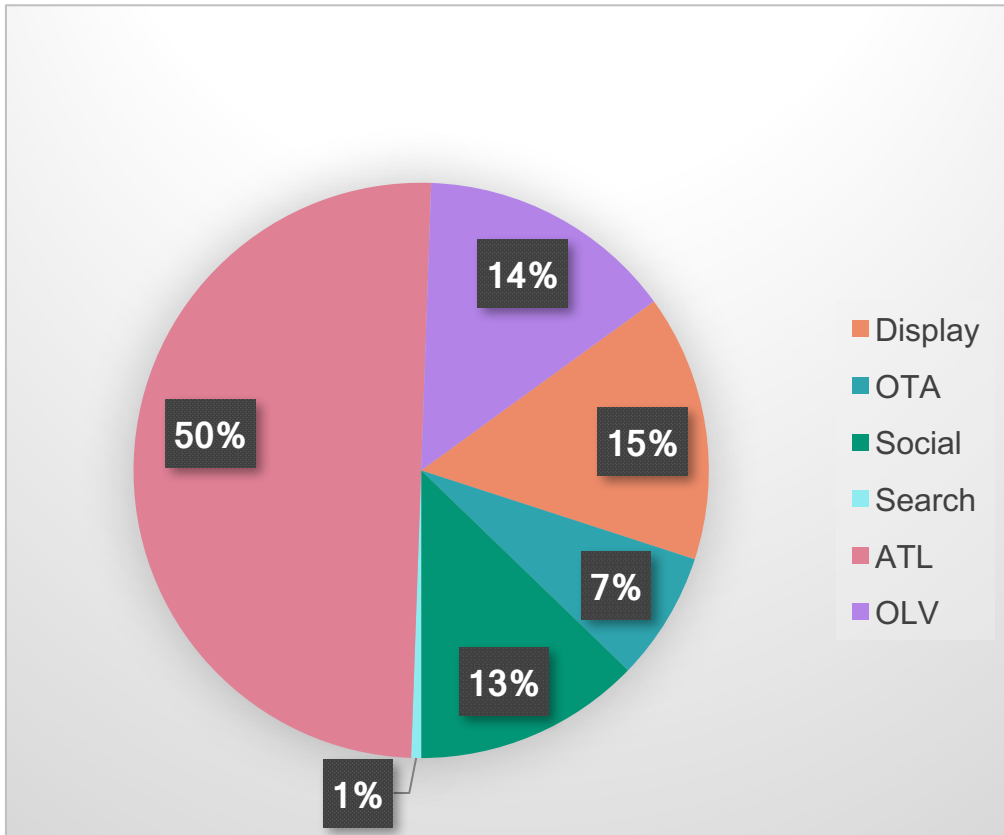
USA CAMPAIGN BUDGET ALLOCATION

Market	Allocation
Australia	8%
Brazil	8%
Canada	5%
Germany	9%
India	11%
Japan	10%
Mexico	15%
South Korea	3%
France	7%
UK	5%
China	19%
Total	100%

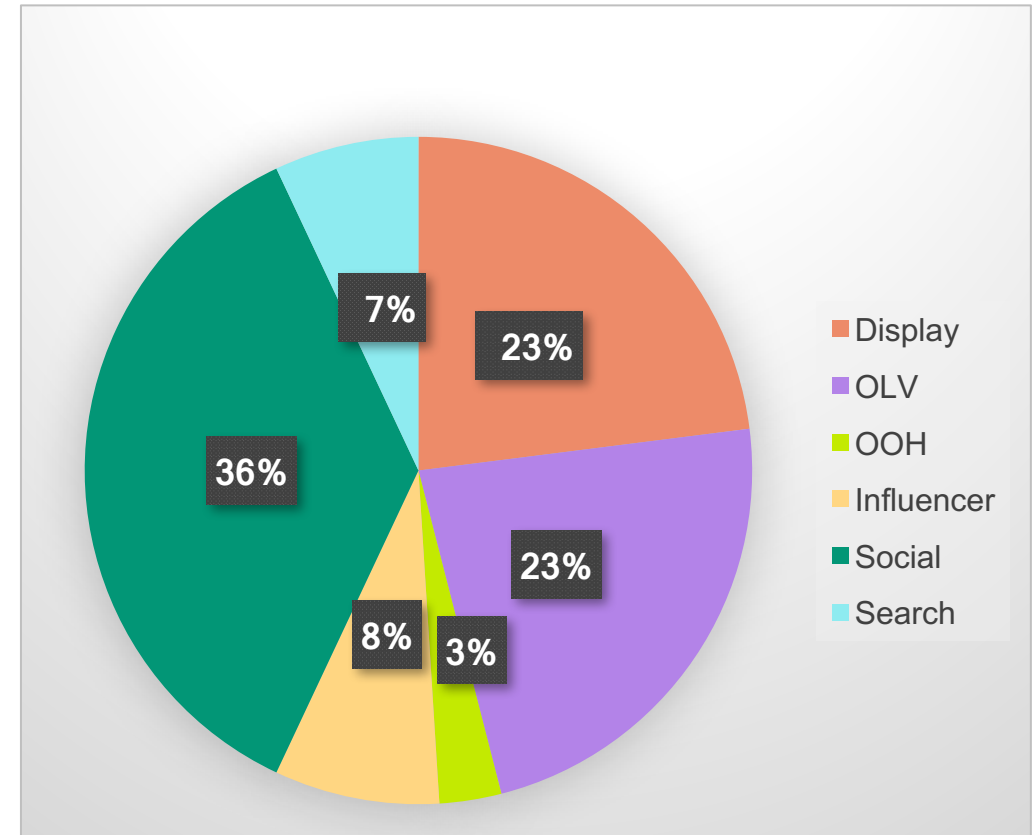
FY2017 Media Reprogram

To maximize presence in the market, we moved to channels that engaged our audience with inspirational and authentic travel content – but which are also more resilient to world events.

FY2016 Spend/Allocation



FY2017 Spend/Allocation



FY2017 USA Campaign Topline Results*

Focus:

Drive Results

Maximize and optimize ROI: Right messages, right channels, right markets, right times, and right investment levels.

By telling a deeper travel story, we've gained in the areas that are the most effective in influencing traveler decision-making and increased all social interactions by 5%.

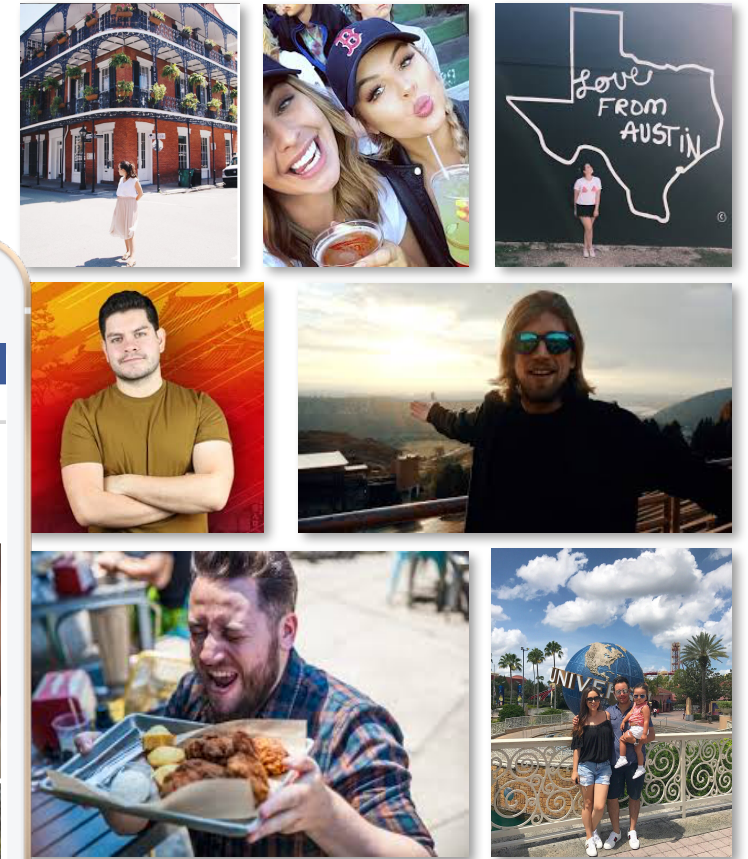


Measurement	FY2016	FY2017*	YOY
Total Impressions	4,834,438,987	6,464,830,746	34%
Website Page Views	27,230,710	32,348,122	19%
Comments, Likes, Shares, and Rich Media Interactions	10,783,079	11,215,306	5%
<i>Comments, Likes & Shares</i>	10,783,079	7,768,192	-28%
<i>Rich Media Interactions</i>	0	3,447,114	n/a
Video Views (:15 Social, OLV)	349,836,617	264,247,545	-24%

*Preliminary

Focus on Deeper Storytelling with Authentic Voices

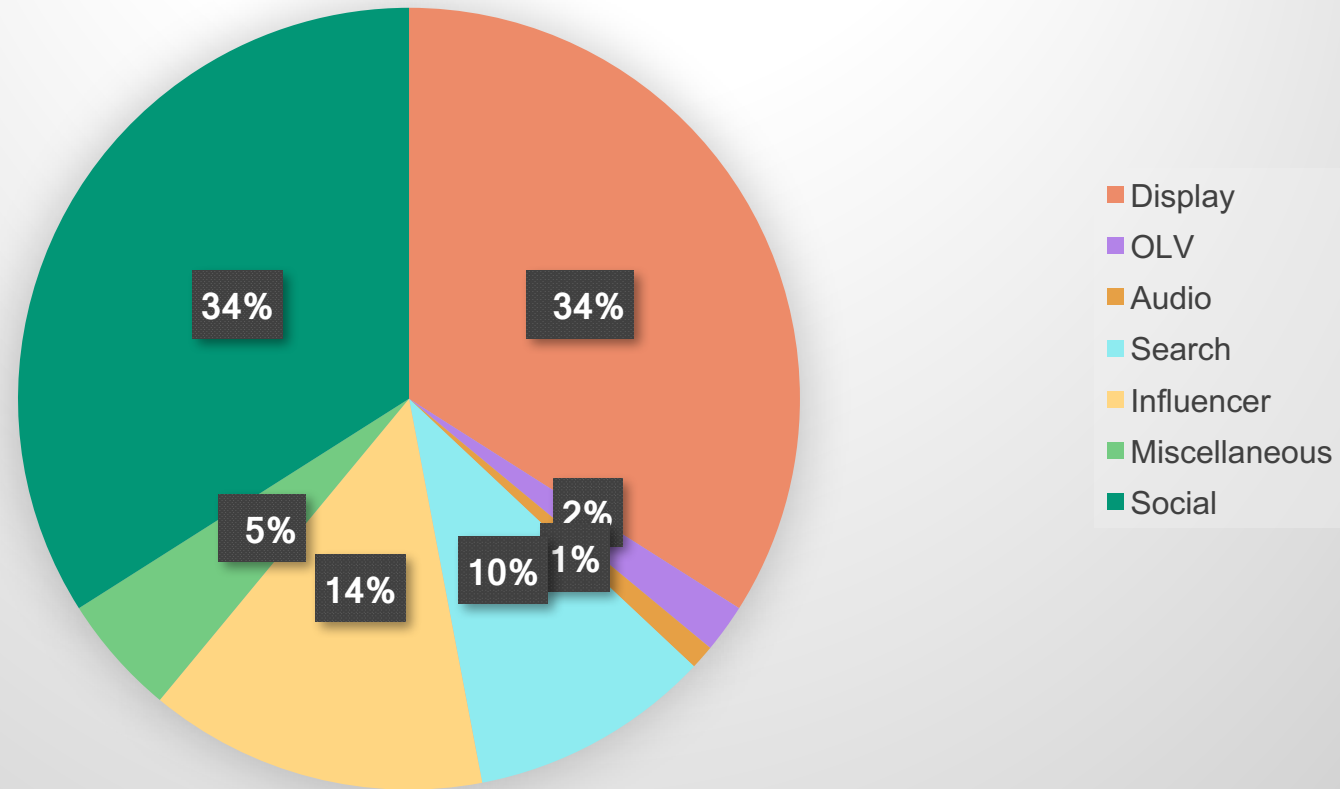
- Influencer engagement showed overwhelmingly positive sentiment for USA content, and bring authenticity to travel experiences
- Collection + Canvas ad unit test resulted an open rate was 4.6x higher when compared to regular canvas ads and engagement rate was more than double
- Focus: Australia, Canada, Germany, Mexico



FY2018 Spend/Allocation

For this fiscal year, social and display represent the bulk of the buy, though we've selected channels and formats that continue to allow for deeper storytelling & discovery.

FY2018 Channel/Spend Allocation



Screen Strategy & Storytelling

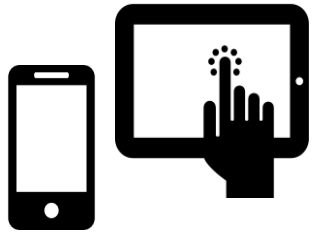


Screen Vision

“From mobile to giant screen and everything in between”



Screen Strategy & Storytelling Platforms



Mobile

Thumb-stopping and snackable content is everything



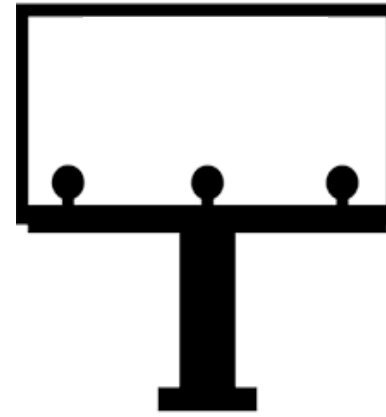
Laptop/Desktop

Serves as a portal to trip planning with multimedia videos



Smart TV

Caters to “lean back and watch” behavior with personalized playlists



Digital OOH

Connected media delivers engaging, experiential content in situ



Giant Screen

Immerses audiences in longer-form “mini-movies” (thematic)

Netflix (SVOD)

National Parks Adventure can now be seen by Netflix' 104MM subscribers – half of which are signed up outside the USA.

The global digital giant has transformed the way the public watch TV and Subscription Video on Demand (SVOD) has taken the world by storm.

The screenshot displays the Netflix interface for the documentary 'National Parks Adventure'. At the top, the Netflix logo is on the left, and navigation links for Home, TV Shows, Movies, Originals, Recently Added, and My List are on the right. A search icon, a notification bell with '0+', and a profile icon are also visible. The main title 'National Parks Adventure' is prominently displayed, followed by 'New 2016 TV-G 42m'. Below this, a synopsis states: 'Narrated by Robert Redford, this documentary tours the awe-inspiring landscapes, historic sites and untamed wilderness of America's great parks.' It also lists 'Starring: Robert Redford' and 'Director: Greg MacGillivray', with genres 'Documentaries, Science & Nature Docs'. A large play button is centered over a scenic mountain landscape. At the bottom of the main content area, there are three tabs: 'OVERVIEW' (which is underlined), 'MORE LIKE THIS', and 'DETAILS'. Below this is a 'Popular on Netflix' section featuring a row of four content cards: 'THE CLOVERFIELD PARADOX', 'ERASED', 'OCT 8', and 'Grace and Frankie' (with a 'NEW EPISODES' badge).

America's Musical Journey

- Sneak peek at Sundance Film Festival
January 20, 2018
- Global Premiere in Washington, D.C.
February 15 & 16, 2018
- Mexican Premiere: Papalote Museo del Niño,
March 15, 2018
- French Premiere: La Geode
Spring 2018



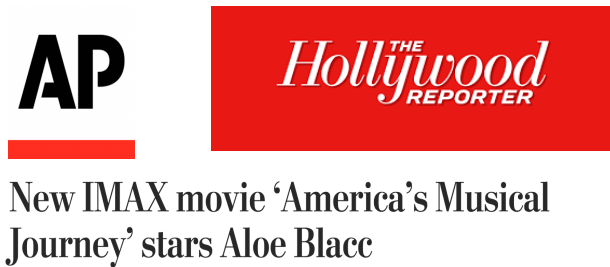
America's Musical Journey Trailer

Narrated By
MORGAN FREEMAN



Americas Musical Journey: Road to the Global Premiere

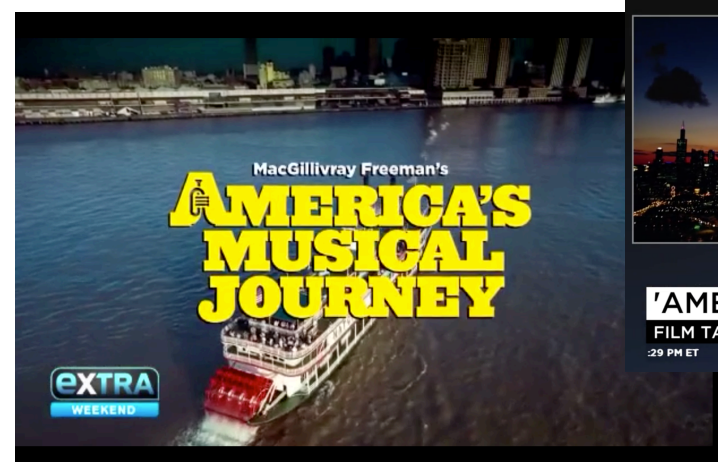
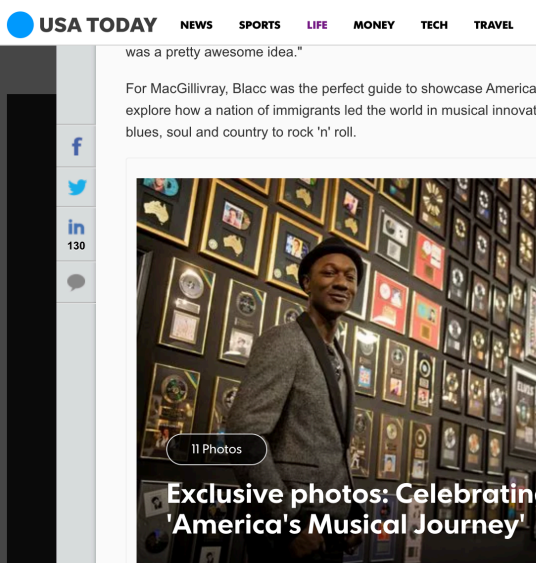
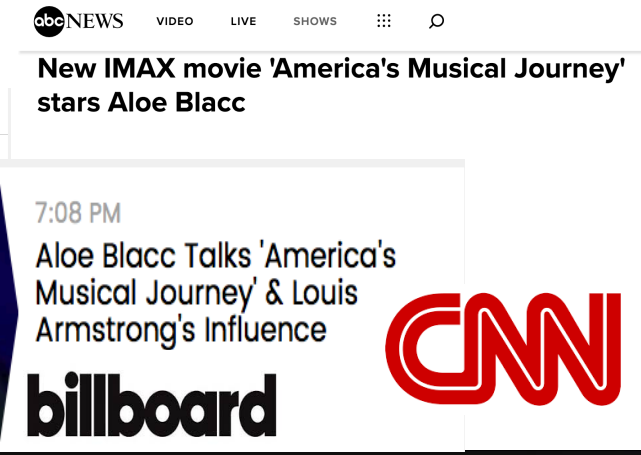
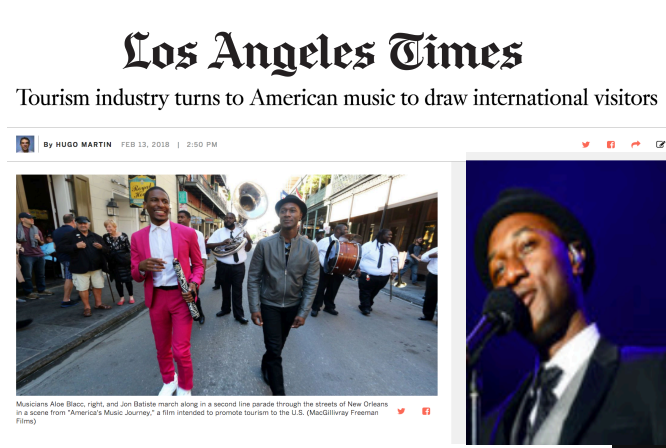
Leading up to the global premiere and release of "Americas Musical Journey," Brand USA has already secured a steady stream of high-quality, high-impact press with top-tier entertainment, travel, consumer, business and trade press across the globe.



New IMAX movie 'America's Musical Journey' stars Aloe Blacc



This undated image taken from video and provided by Brand USA is from the new IMAX movie called "America's Musical Journey" and shows musician Aloe Blacc in New Orleans looking at a statue of the late Louis Armstrong. The movie premieres Thursday, Feb. 15, 2018, and was produced by Brand USA, the agency that pany-target.com/click/.../Developing_leaders_for_thealong with MacGillivray Freeman Films.



“Heard Around the World”

“...the film is designed to **“remind the world how diverse, all-inclusive and welcoming the country is.”** Tom Garzilli

AP

“It’s a great story-telling device,” Tom Garzilli, chief marketing officer for Brand USA, said of music. **“It’s also what connects a lot of the world to us.”**

Los Angeles Times

The new film will take audiences on a tour of some of the most iconic cities across the USA, **exploring the diversity of experiences and celebrating American culture through music.**



... Aloe Blacc said he hopes the movie sparks in viewers a “love for music.. **If you get to see ‘America’s Musical Journey,’ you’ll see all the best there is to see here in the U.S. Politics aside, it’s a beautiful country.”**

THE CANADIAN PRESS

MacGillivray Freeman's
AMERICA'S MUSICAL JOURNEY

“The world helped bring us our music, and we want to share that back with the world,” Garzilli said.

TRAVEL60WEEKLY

“Exploring the USA, city by city, state by state, the singer traces America’s music roots in the new documentary. **Music is the glue that helps bring people together.”**

EXTRA

“Narrated by Morgan Freeman, the film features Blacc as a virtual tour guide through the history of jazz, blues and hip hop. **It’s moving to see the capacity of music to bring people together.”**

PRESS ASSOCIATION

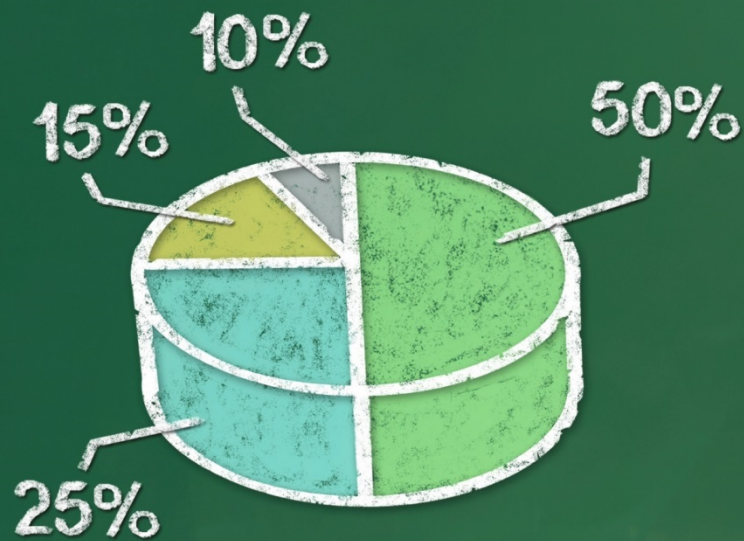
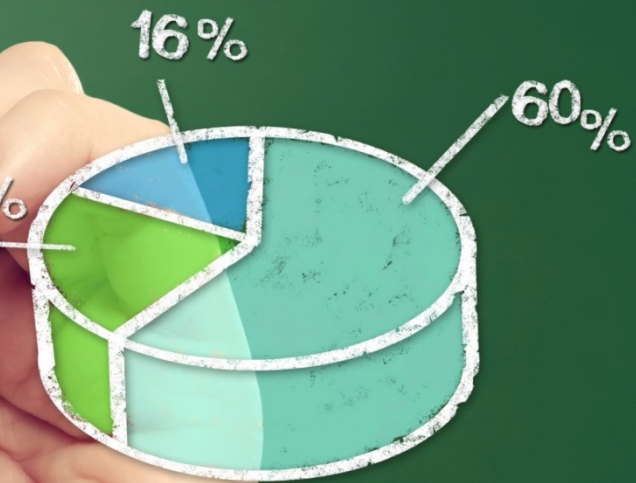
“SOUNDS GOOD AMERICA'S Musical Journey, a film celebrating the USA's diversity in music is hitting select cinemas from February 16.”

THE Sun

“Making a song and dance. It’s not just Elvis’s blue suede shoes you can follow in the footsteps of: a new doco unveils US music destinations.”

THE AUSTRALIAN

ROI



RETURN
ON
INVESTMENT



General Approach



=



x



Impact

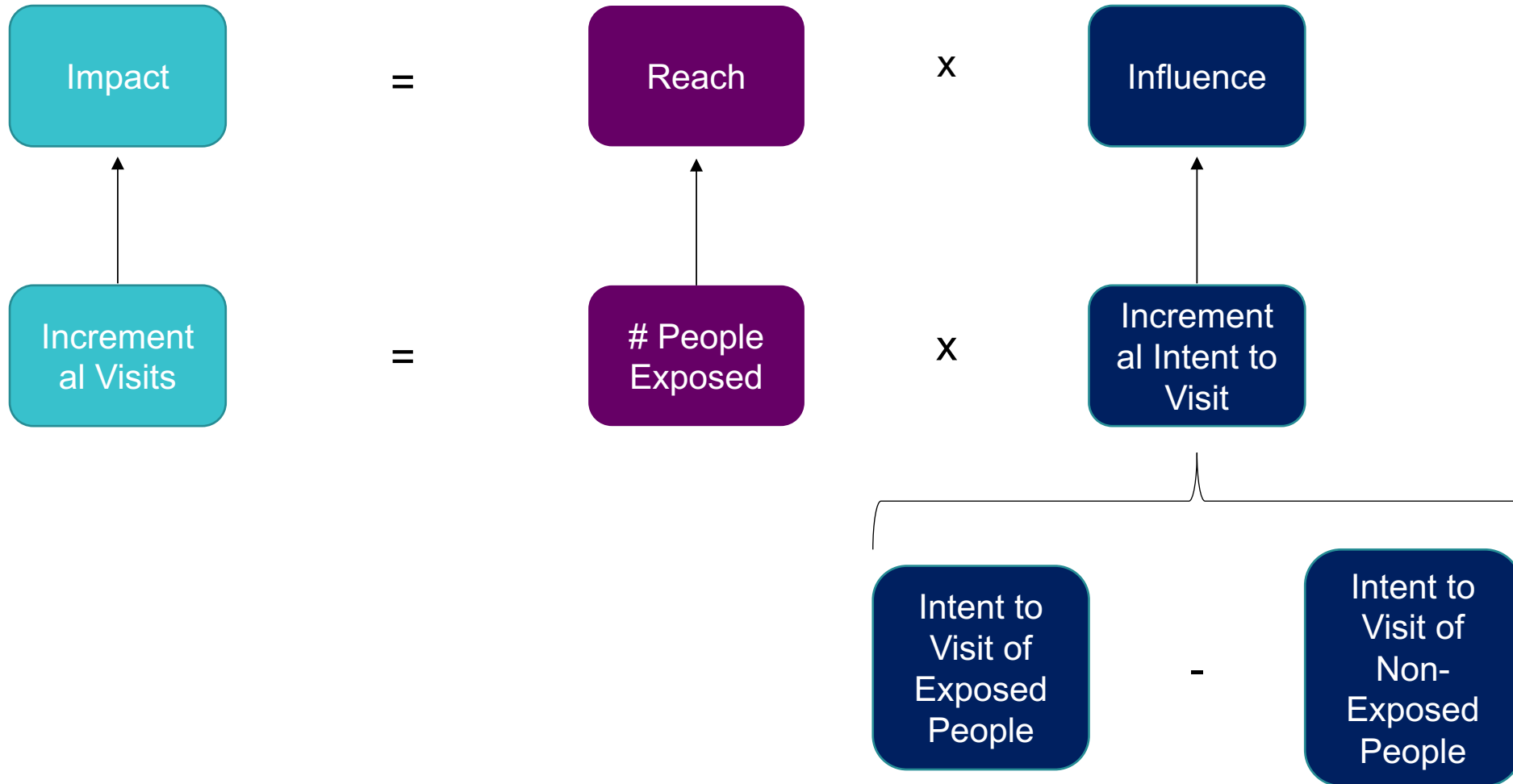
=

Reach

x

Influence

General Approach



Approach for the Film's Incremental Intent to Visit the U.S.



Intent to visit BEFORE
they saw they film

VS



Intent to visit AFTER
seeing the film



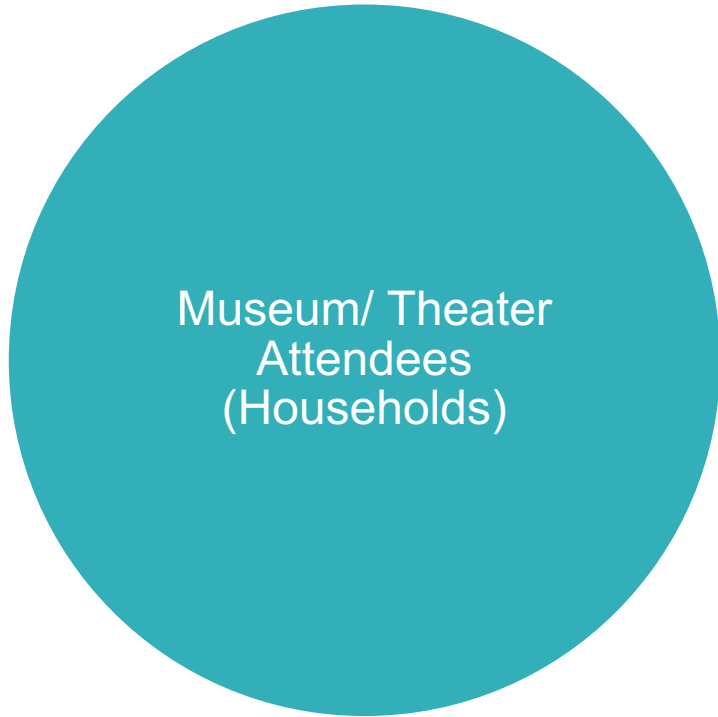
Accuracy Requires 3 Key Variables

- Medium (In Theater vs. Streaming)
- Time (When will the incremental visit occur?)
- Market (How does it vary by market?)

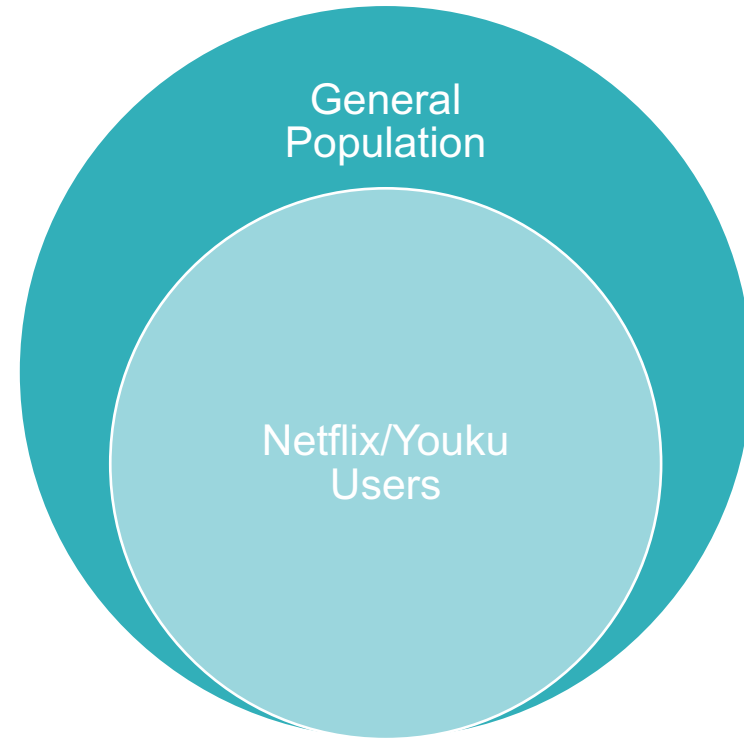
Medium



In Theater



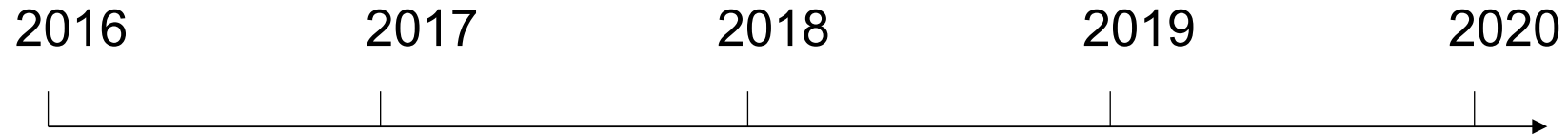
Streaming



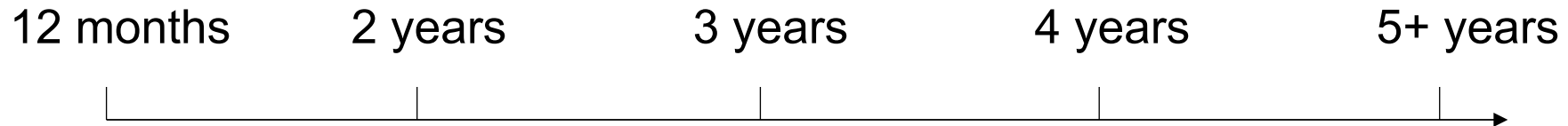
Timing



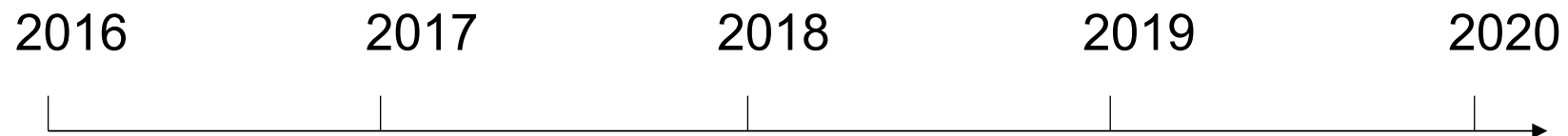
When did they see it?



When will they visit?



Year of Impact





In-Theater (one city sample projected to the region) 300 households per market

- Vancouver - Canada
- Mexico City - LATAM
- Paris – Europe
- Mumbai - Asia

Streaming (based on Youku viewers and Netflix subscriptions) 400 completes per market

- China (only market where actuals are available)
- Canada
- UK
- Germany
- Brazil
- Mexico

FY2018 Core Music Platform and Strategic Integration

MARKETING POSITIONING	<p>The United States of America welcomes travelers to discover our awesome possibilities. The diversity of the USA's destinations, experiences, and people is exciting and unique. The USA offers nearly limitless authentic travel experiences. Visitors to the USA have the opportunity to travel freely throughout the country and explore and discover all the USA has to offer.</p>				
FY2018 CORE PLATFORM	Music				
FY2018 COMPLEMENTARY PLATFORMS	Great Outdoors Neighborhoods, Cities, and Towns Arts, Culture, and Culinary Road Trips				
MESSAGE FOUNDATION	Possibility (Promise)	Proximity (Value Proposition)		Welcoming (Tone)	
PLANING APPROACH	Integration, Authenticity, ROI				
PLANNING TOOLS	Research & Analytics Content and Marketing Calendar				
MARKETING SEGMENTS	CONSUMER MARKETING	PUBLIC RELATIONS	GLOBAL TRADE	COOPERATIVE MARKETING	CORPORATE COMMUNICATIONS
	Consumer-driven	Consumer- and Trade-driven	Trade-driven	Partner-value, consumer-focused	Stakeholder-driven
MARKETING INTEGRATION	Storytelling, Educating, Sharing				
OPERATIONAL DRIVER	Efficiency, Effectiveness, Compliance				

Music Platform



Hear the Music. Experience the USA.



GoU**S**A

Connected, Web, Streaming & Non-Linear TV



Program Development

- Brand USA is in conversation with a variety of entertainment companies and world class creators to develop signature series, licensed content and curated playlists that feature the best in travel entertainment.



Audience Development

- With a goal of 3MM video views by year end, we have an aggressive plan to build our audience both on the channel and cross platform.



#AskALocal



One Big Welcome evolves into an unscripted, genuine and unique invitation to visit the USA





QUESTIONS & ANSWERS

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Brand USA



CLOSING REMARKS

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Brand USA



Like/Follow/Share

Travel Industry

TheBrandUSA.com



@BrandUSA



BrandUSATV



BrandUSA

Consumer

VisitTheUSA.com



@VisitTheUSA



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Thank You

