

# Road to IPW: U.K. Market Outlook

Welcome! While you wait for us to get started, here's a few housekeeping notes:

- This webinar is being recorded and will be posted/available on our website by tomorrow.
- You will receive a link to the recording/deck tomorrow in your inbox.
- Please type your questions into the Q&A box; we will do our best to answer as many as we can live or electronically, but any we cannot answer will be responded to via email post-webinar.
- Not sure who to contact for additional questions? Email [info@thebrandusa.com](mailto:info@thebrandusa.com) to be connected with the right party!
- Thank you for being here – the webinar will begin shortly!





# An Introduction

with Cat Reith  
Sr. Director of Partner  
Marketing Programs

Road to IPW:  
U.K. Market Outlook

# An Introduction Agenda



- Housekeeping
- A U.K. Research Update, with Chelsea Benitez
- A Brand USA U.K. Consumer Update, with Jenn Ross
- A Brand USA U.K. Trade Update, with Jackie Ennis
- Brand USA Program Opportunities in the U.K., with Julie Paulson



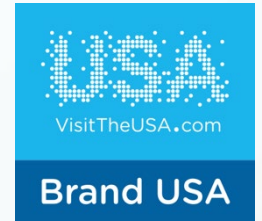
# Chelsea Benitez, Director of Consumer Research



Road to IPW:  
U.K. Market Outlook

Road to IPW: U.K. Market Outlook

# Agenda

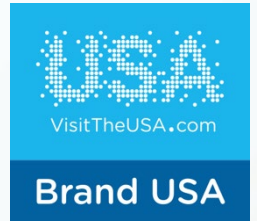


Global Outbound & USA Inbound Travel and Spend

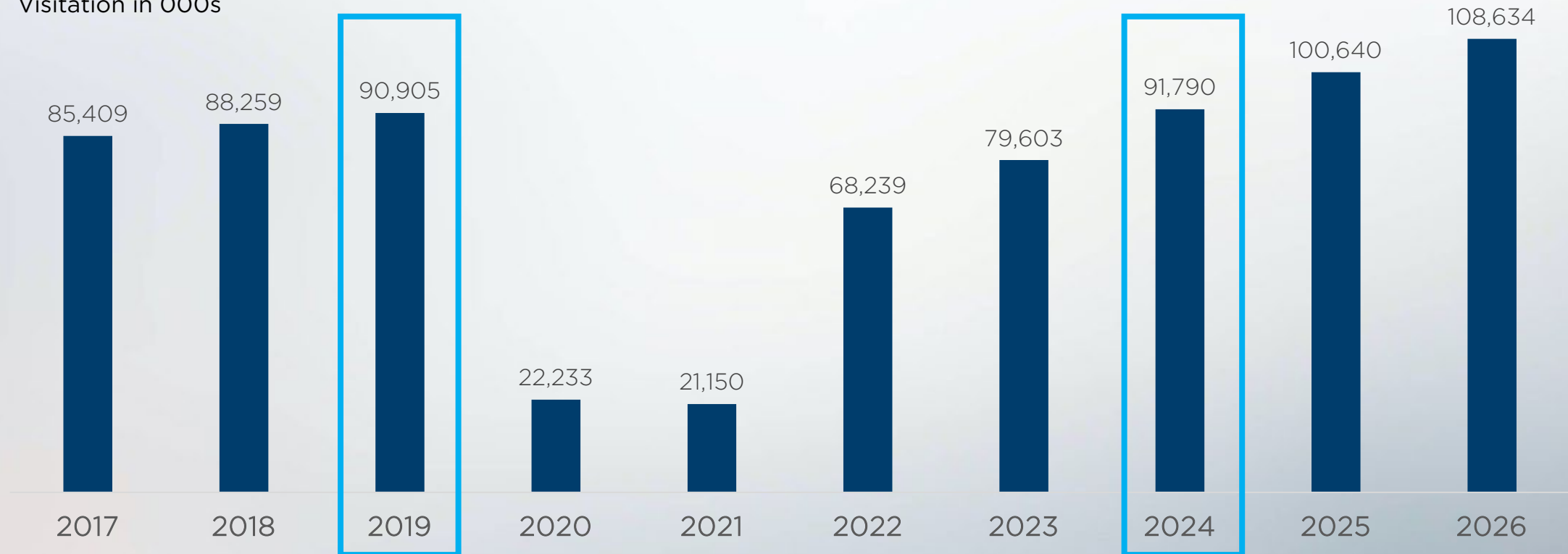
Air Capacity

Consumer Sentiment

# U.K.: Global outbound travel

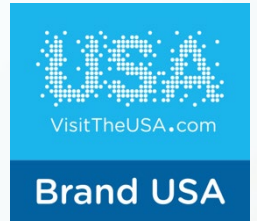


Visitation in 000s

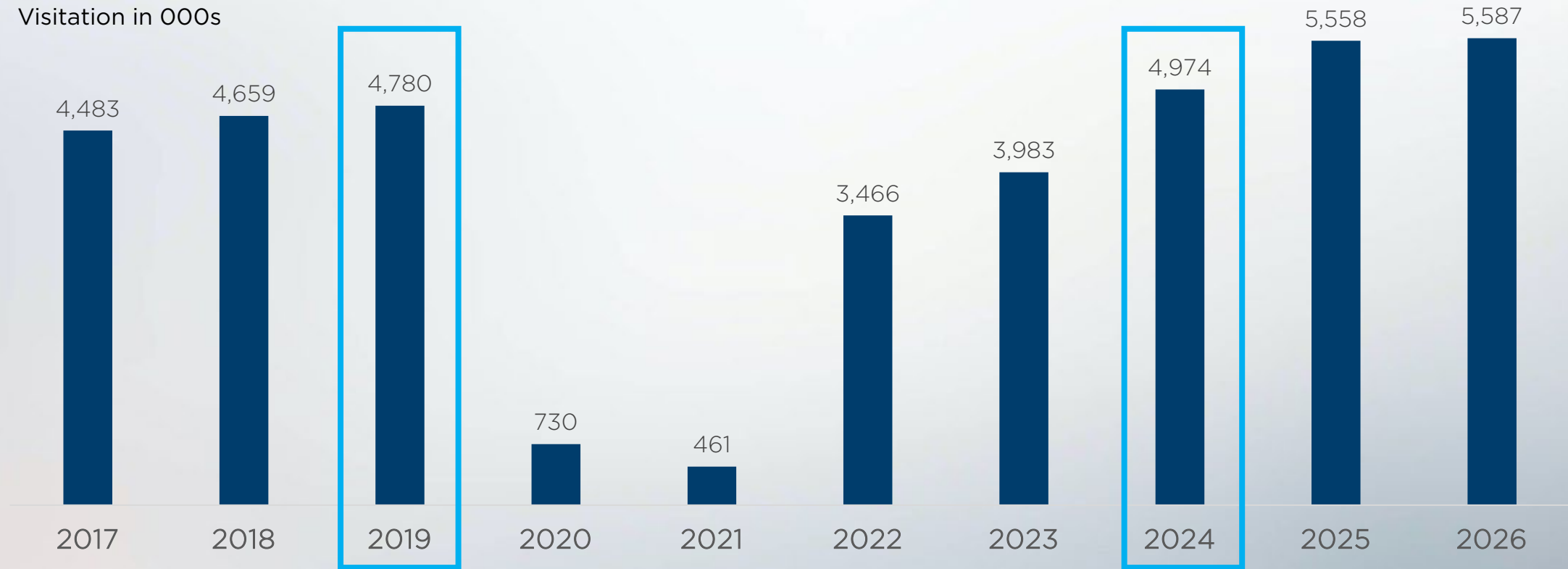


Source: Tourism Economics, March 2023

# U.K.: USA inbound travel



Visitation in 000s

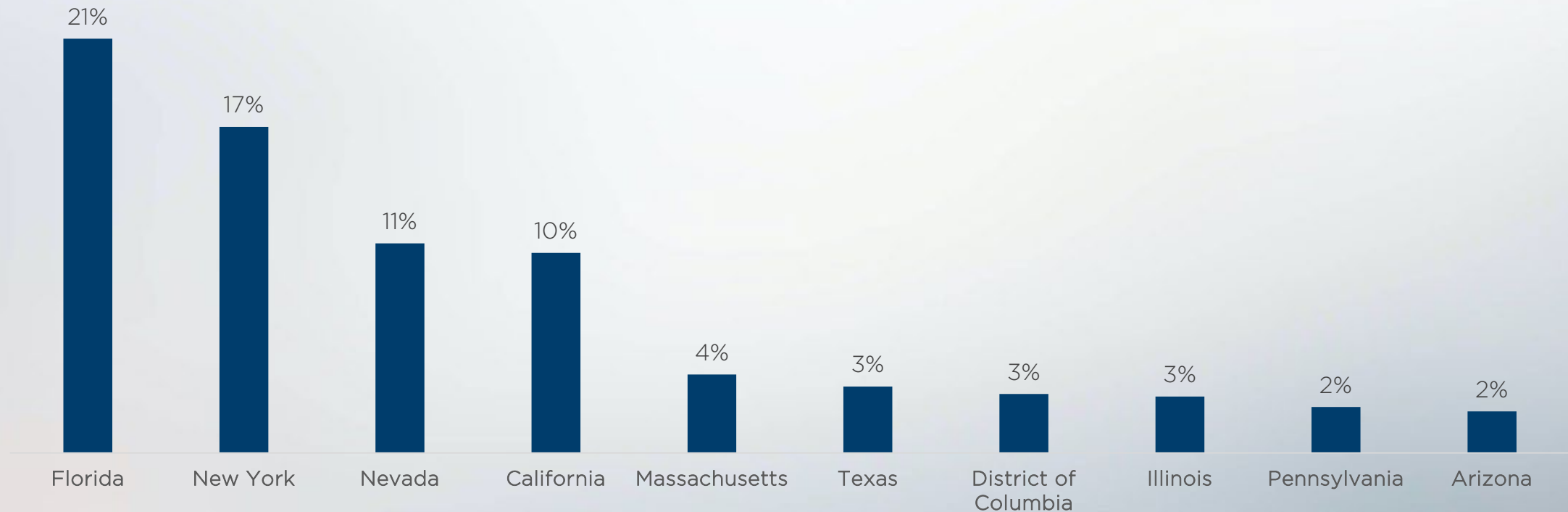


Source: Tourism Economics, March 2023

# U.K.: USA inbound travel – Top 10 states



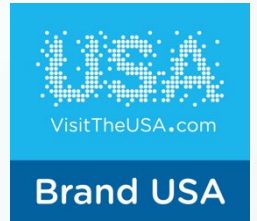
% of 2022 Visitation



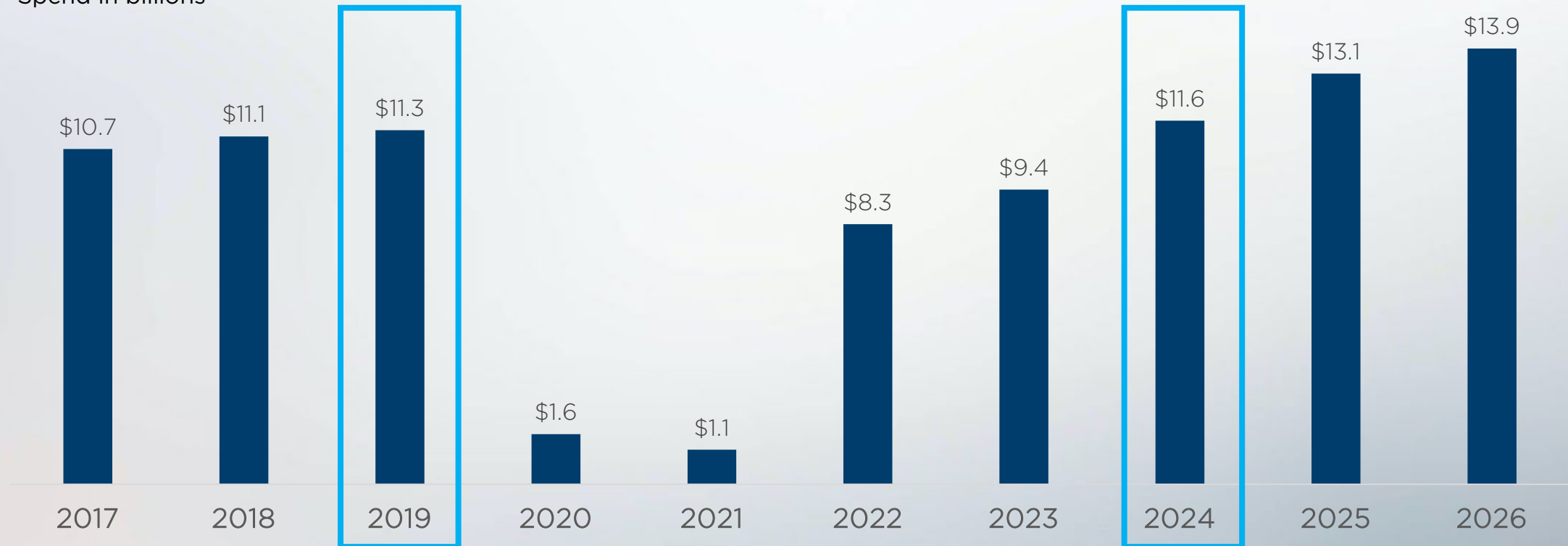
Source: Tourism Economics, March 2023



# U.K.: USA inbound travel spend

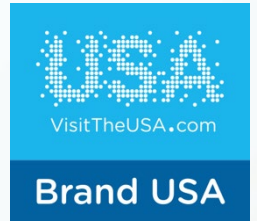


Spend in billions



Source: Tourism Economics, March 2023

# U.K.: Operating air capacity



USA Inbound Operating Air Capacity from the U.K.  
% of 2019



Source: Sabre, April 2023



# U.K.: 2023 Operating air capacity

USA Inbound Operating Air Capacity from the U.K.  
% of 2019



Source: Sabre, April 2023

## Road to IPW: U.K. Market Outlook

# U.K.: 2023 Operating air capacity – Top 10 arrival airports



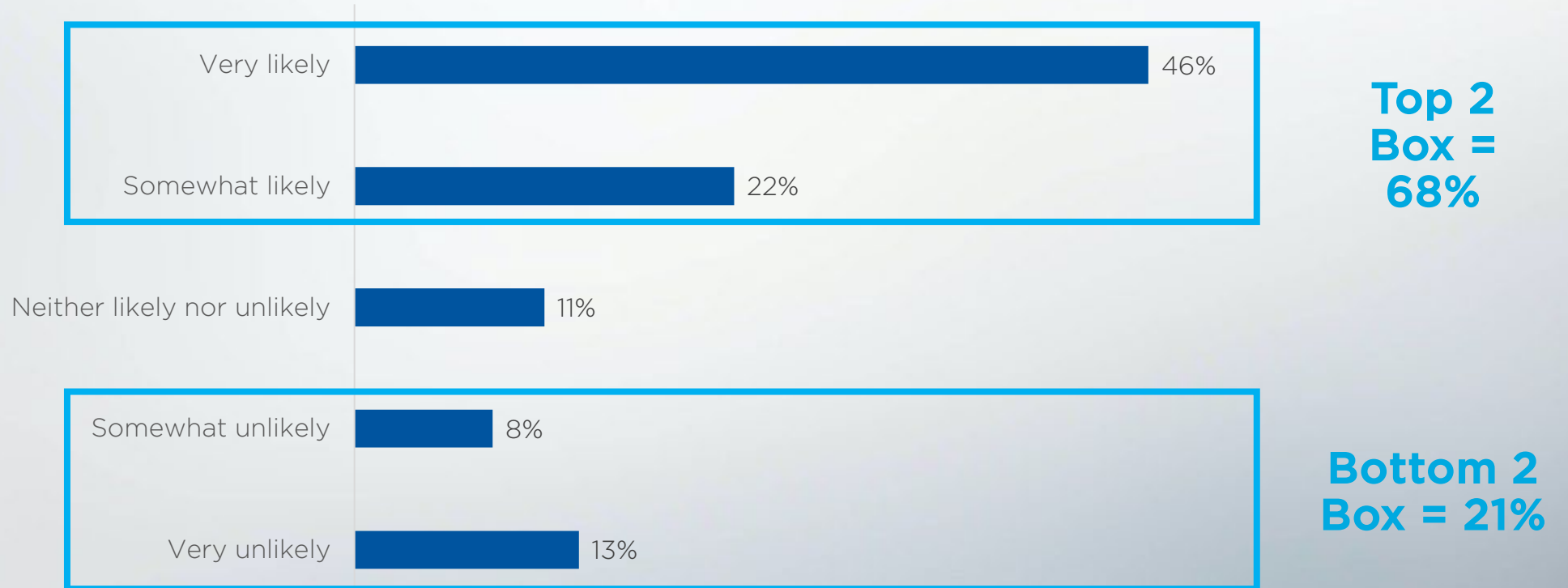
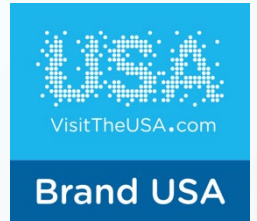
% of 2023 Seat Capacity



Source: Sabre, April 2023

## Road to IPW: U.K. Market Outlook

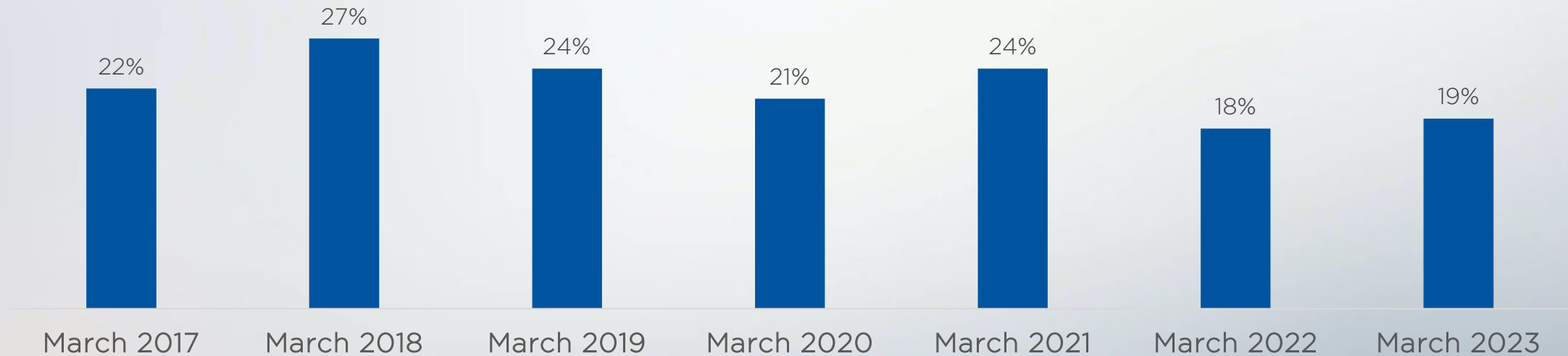
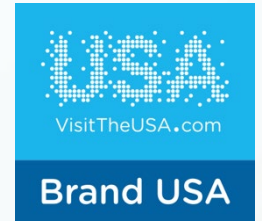
### U.K.: Likelihood to take an international holiday in the next 12 months



Question: How likely are you to take an international holiday in the NEXT 12 MONTHS?  
Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

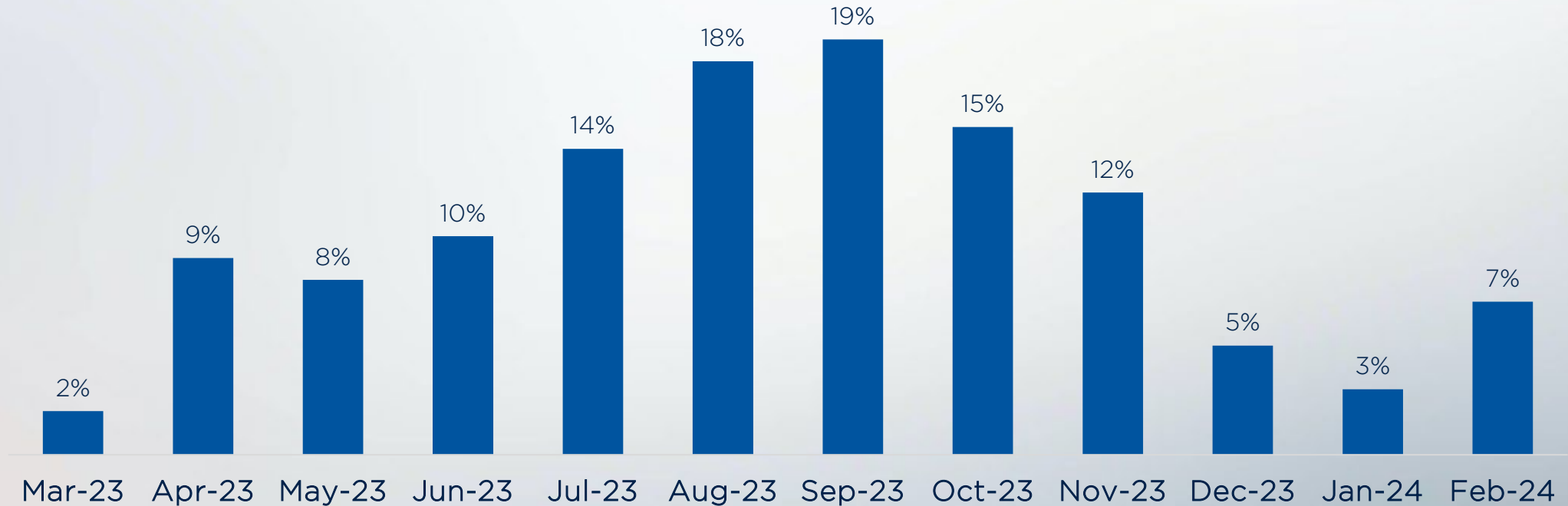
## Road to IPW: U.K. Market Outlook

# U.K.: Likelihood to travel to the USA in the next 12 months



Question: In the NEXT 12 MONTHS, what country or countries will you visit on your international holiday(s)? Please select all that apply.  
Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

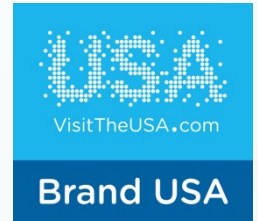
# Month of Travel to the USA



Question: "In which month(s) are you planning to depart for your holiday trip(s) TO THE USA that you anticipate taking in the NEXT 12 MONTHS?"

Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

# Deterrents to Visiting the USA

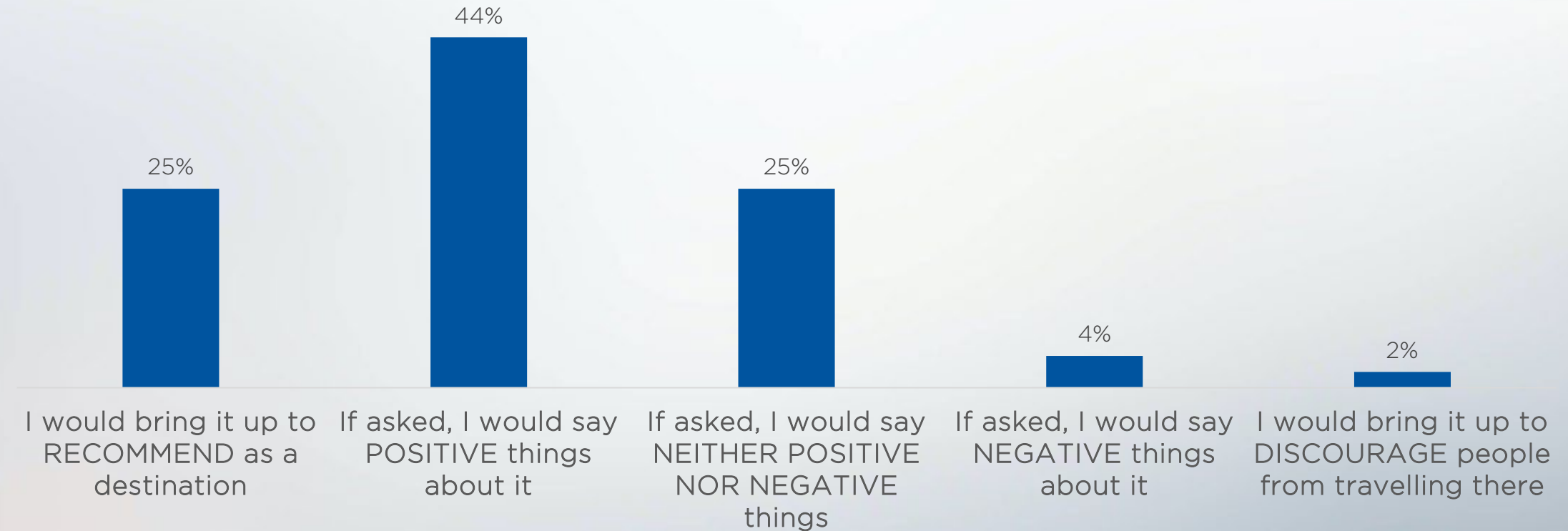
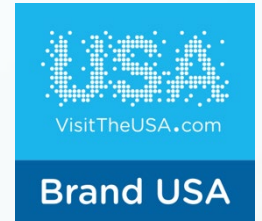


Question: "Why is the United States not a likely holiday destination for you in the next 12 months?"

Source: Brand USA/Big Village, Quarterly Custom Study, March 2023



# U.K.: Attitude towards the USA



Question: If a friend or relative were discussing a future holiday destination with you, which statement would BEST DESCRIBE YOUR ATTITUDE TOWARDS THE UNITED STATES?

Source: Brand USA/Big Village, Quarterly Custom Study, March 2023



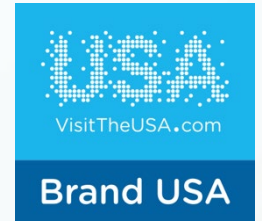
# Consumer Updates with Jenn Ross, Director of Media & In-Kind Planning



Road to IPW:  
Partner Program Opportunities 2023-2024

Consumer Updates

# Integrated Marketing Strategy



Objective: Maintain or increase share/volume

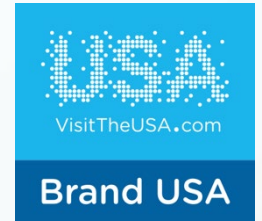
## Consumer Updates

# Media Campaigns Aligned to Traveler Consumer Journey



Consumer Updates

# Branding and Inspiration Layer



## Media Objective:

Drive reach and top of mind awareness

## Creative Opportunity:

Create campaign with broad USA messaging that creates a sense of urgency to visit and inspires action.

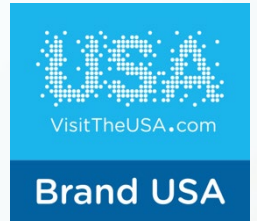
## KPIs:

Reach (Impressions), Video Completion Rate, Cost per Completed View

A woman in a red jacket and a child in an orange jacket are walking in a snowy city street. The woman is wearing a red jacket, a blue and white striped beanie, and a blue face mask. The child is wearing an orange jacket. They are walking towards the right. The background shows a city street with buildings, snow on the ground, and other people in the distance. The text "THIS IS WHERE FAMILY FUN'S AT" is overlaid on the image in white, bold, sans-serif font.

THIS IS WHERE  
FAMILY FUN'S AT

# Dreaming and Education Layer



## Media Objective:

Increase familiarity and consideration through content.

## Creative Opportunity:

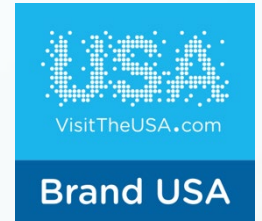
Leverage United Stories campaign to take consumers deeper into content by introducing regional, multi-state road trip itineraries.

## KPIs:

Video Completion Rate, Cost per Completed View

Consumer Updates

# Shopping Layer



## Media Objective:

Increase intent through site visitation.

## Creative Opportunity:

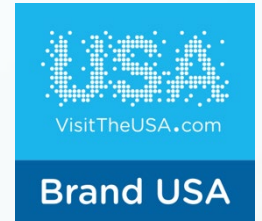
Feature a variety of destinations that ladder up to the “This Is Where It’s At” creative for consistency and maximum impact.

## KPIs:

Click Through Rate, Cost per Click, Onsite Conversion Rate, Cost per Conversion



# Where We'll Be

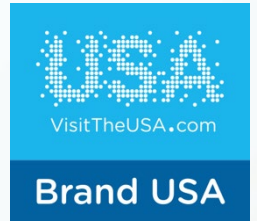


Vendors & Channels across all media layers:

- YouTube
- Sojern
- Expedia
- Meta
- Programmatic
- Google
- TripAdvisor
- Channel 4
- The Telegraph
- Euronews
- Influencers

Consumer Updates

# Consumer Media Timing



	April	May	June	July	August	September
Branding	Light Green	Light Green	Light Green	Dark Green	Light Green	White
Education	Light Green	Light Green	Light Green	Dark Green	Light Green	White
Shopping	Light Green	Light Green	Light Green	Light Green	Light Green	Light Green



# U.K. & Ireland Trade Update with Jackie Ennis, Vice President Global Trade Development

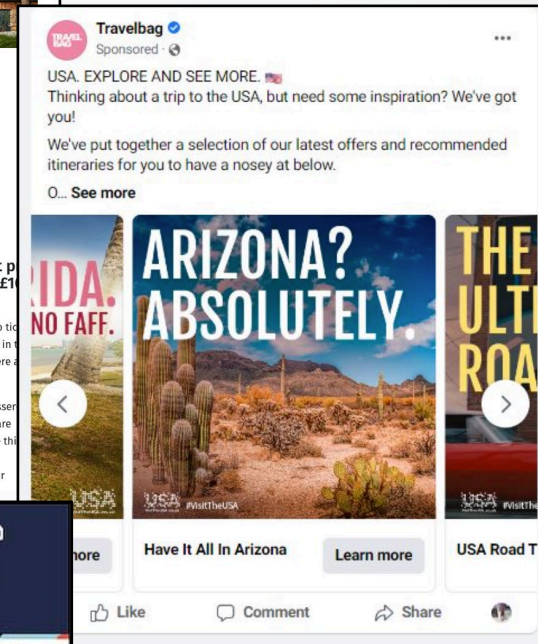
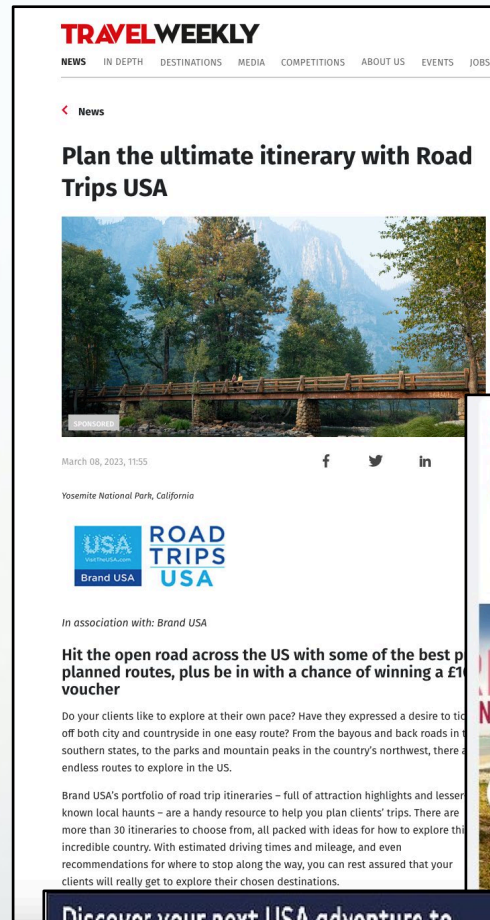


Road to IPW:  
U.K. Market Outlook

# Global Trade Development

## Trade Campaigns

- Consumer Recovery Campaigns:
  - Trailfinders, BA Holidays, Travelbag, Lastminute.com
- Tour Operator Campaigns include:
  - Abercrombie & Kent, BA Holidays, Barrhead, Carrier, First Class Holidays, North America Travel Service, Saga Holidays, Inspire My Holiday, American Affair
- Digital Campaigns with Tour Operator Call to Action:
  - American Sky, Click and Go, Flight Centre, Ocean Holidays, Travelbag, Travelplanners, Tour America



# Global Trade Development

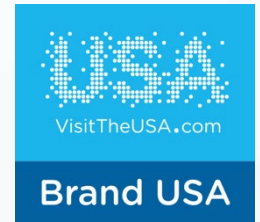
## Trade Media Campaigns

- Trade Media Campaigns Promoting
- Road Trip USA Itineraries with Trade Call to Action

- U.K. - Travel Weekly and Gold Medal
- Ireland - ITTN and American Holidays



# ROAD TRIPS USA



Picture: Shepherdstown, West Virginia

Explore and expand your USA knowledge and be in with a chance of winning some exciting prizes! Brand USA has created multi-state, self-drive itineraries in order to better assist you when planning your clients' U.S. road trip! There are over 30 itineraries

## Global Trade Development

# Agent Engagement

- U.K. & Europe MegaFam in Partnership with American Airlines and British Airways- November 2022
- U.K & Ireland MegaFam in Partnership with American Airlines and British Airways- April 2023
- Aer Lingus Agent Fam- June 2023
- Jetblue Agent Fam- September 2023
- Participation in Tour Operator, Trade Media and Visit USA Roadshows and Training Events
- USA Discovery Program Promotion and Incentives
- Monthly Newsletters



## USA DISCOVERY PROGRAM

USA Discovery Program UK & Ireland February Newsletter [View this email in your browser](#)

**Brand USA's 2023 MegaFam is coming soon!**



Scottsdale, Arizona

### Exclusive sneak peak into the Brand USA MegaFam!

The Brand USA MegaFam will see 60 travel agents from the U.K. & Ireland travel on six itineraries across the United States, from Georgia and Massachusetts, to Arizona and California, and so many more amazing U.S. destinations! The trip will depart on Wednesday 19th April and arrive back in the U.K. & Ireland on Thursday 27th April 2023.

For a chance to win, log all bookings made between Monday 16th January – Tuesday 28th February 2023 with American Airlines and British Airways (U.K. and Ireland - USA - U.K. and Ireland). Each booking counts as a new entry! Don't forget to complete the MegaFam Airlines 2023 badge to be eligible for a spot on the MegaFam.

The chance to win a place on the Brand USA U.K. & Ireland MegaFam is now even easier as you can simply log bookings via the Google Form here: <https://forms.gle/enGMKnYzZMbJUTWQA>

Please note bookings can still be logged on the USA Discovery Program website. Please [click here](#) to log your bookings.



### Badge Spotlight: Discover Puerto Rico

The archipelago in the Caribbean Sea consists of a main island, four small islands, and hundreds of cays and islets. The U.S. territory is only 100 miles long and 35 miles wide (8,870 square kilometers), but it packs an amazing diversity of sights, scenery and culture into one sun-kissed Caribbean paradise. Consider kayaking the bioluminescent bays, tasting local rums, hiking to see waterfalls in a rainforest or viewing contemporary art in a museum that is its own architectural masterpiece. The hardest part will be choosing from so many options.



## Global Trade Development

# Trade & Media Events

- Travel Week U.K. & Europe 2022- October 2022
- Thanksgiving Celebration- November 2022
- Global Marketplace Virtual One-to-one Meetings- February 2023
- Bourbon and Bluegrass Cocktail Masterclass Event- February 2023
- Dublin *Into Nature's Wild* Film Event- May 2023
- Royal Ascot Horse Racing and Bourbon Tasting- June 2023
- Luna Cinema Partnership- June-September 2023
- RHS Hampton Court Garden Festival with Trade and Media Activations- July 2023
- Travel Week U.K. & Ireland 2023- October 2023





# Quick Poll





Do you currently have Trade rep support in the U.K.?

- a. Yes - directly
- b. Yes - through my state/regional DMO
- c. No



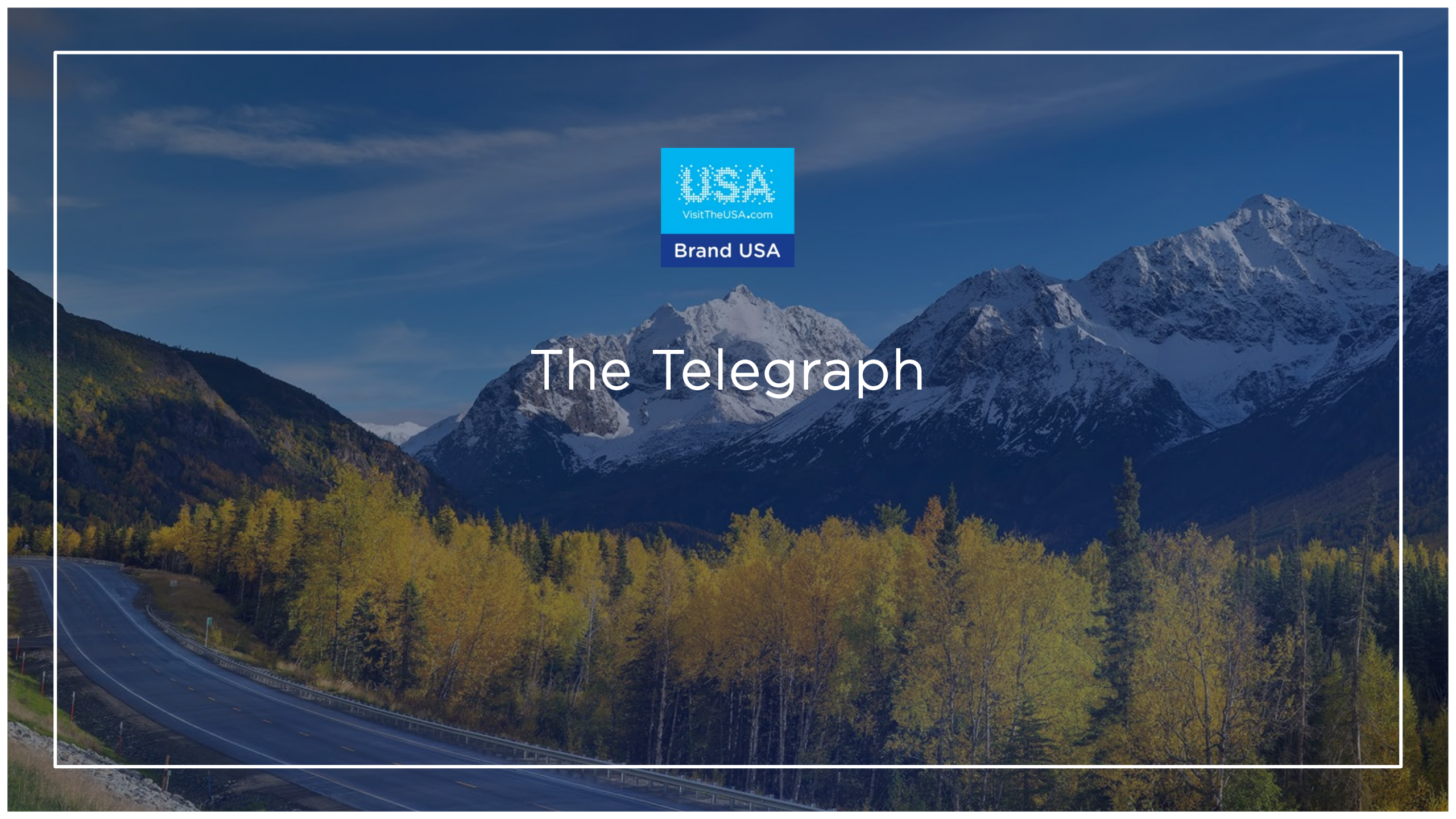
# U.K. Partner Programs

Julie Paulson  
Sr. Manager of Partner  
Marketing Programs

Road to IPW:  
U.K. Market Outlook

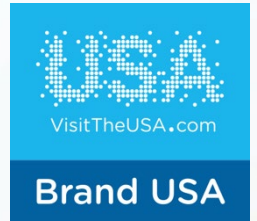


# The Telegraph



FY23 The Telegraph Program

# Program Overview



The Telegraph program offers a multi-faceted, content-driven program that will reach millions of potential travelers through exposure in the U.K.'s number one quality news brand and travel publisher.

The news brand's readership relies on The Telegraph for travel inspiration that subsequently generates a spend of £21.8 billion on travel; 47% of all U.K. spend.

## CAMPAIGN KPIs



REACH  
IMPRESSIONS

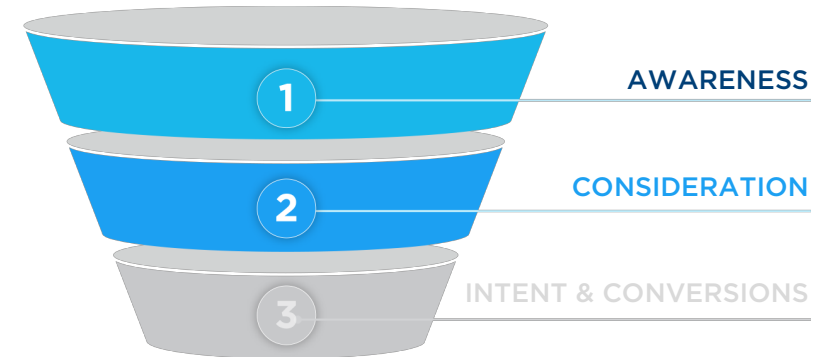


ENGAGEMENT  
CLICKS/CTR

Road to IPW: U.K. Market Outlook

## STAGE OF TRIP PLANNING

A higher funnel travel inspiration platform that garners awareness



IN-MARKET DATES: ONGOING

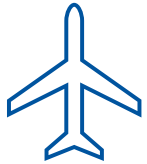
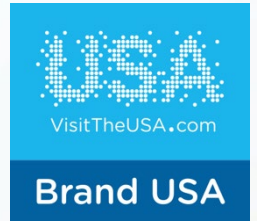
COMMITMENT DATE: 10 WEEKS PRIOR TO LAUNCH DATES

ASSET COLLECTION DATE: 8 WEEKS PRIOR TO LAUNCH DATE

CAMPAIGN LENGTH: 2 - 3 MONTHS

REPORTING: 90 DAYS AFTER CAMPAIGN COMPLETION

# Key Benefits



Telegraph readers are 21% more likely to travel to North America than any other destination.



With a total reach of 27.2 million (including 4 million monthly print readers), The Telegraph reaches 52% of the U.K. population.



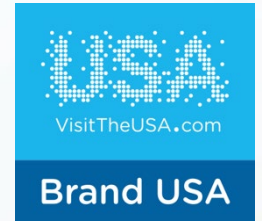
Telegraph Travel has 3.3 million monthly unique U.K. users.



The Telegraph's editorial team will produce both informative and inspiring content that will be amplified across social channels to gain a wider reach.

FY23 The Telegraph Program

# Partner Program Details



- 2 Sponsored articles on Brand USA hub + iPad edition
- Native placements within travel editorial and premium channels
- 1 online Branded story
- 2-week destination-specific sponsorship of the USA editorial section on telegraph.co.uk
- Video in-article ads
- Digital display ads
- 1 Print display page in The Telegraph Magazine

2-3  
Months

7.87M  
Impressions

Sponsored Articles

# FY23 The Telegraph Program Creative Examples

Branded Story

Traffic Drivers

Display Page (Print)



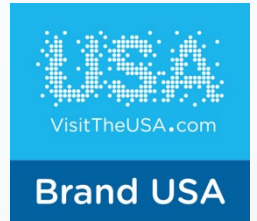
# Family Traveller





FY23 Family Traveller

# Program Overview



Family Traveller is a multi-platform, award-winning, lifestyle brand which targets parents via inspiring content reaching 500,000 U.K. households per month across print, website, email and social media. Family Traveller’s target audience is 28 to 50 year-old affluent mothers with children aged 0 to 15 years.

Brand USA’s Family Traveller program offers a content-driven marketing campaign designed to reach the U.K. family primed for travel planning.

## CAMPAIGN KPIs



REACH  
IMPRESSIONS

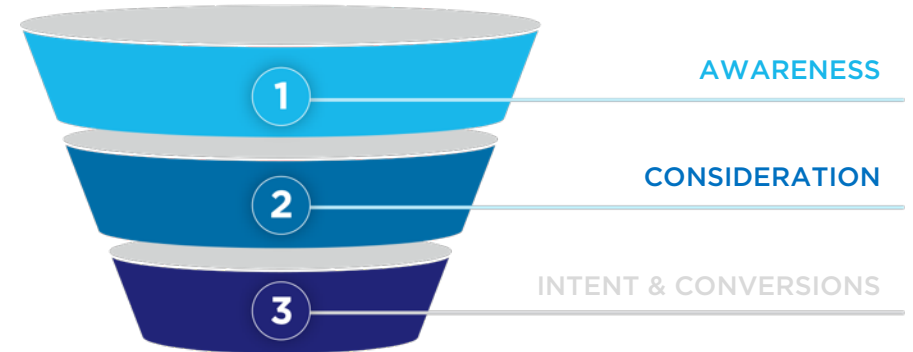


ENGAGEMENT  
CLICKS/CTR

Road to IPW: U.K. Market Outlook

## STAGE OF TRIP PLANNING

Upper funnel planning tool inspiring travelers to consider destinations in future bookings



IN-MARKET DATES: ONGOING

COMMITMENT DATE: 10 WEEKS PRIOR TO LAUNCH DATE

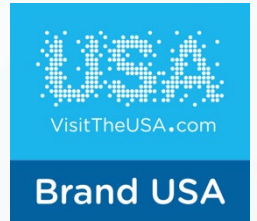
ASSET COLLECTION DATE: 8 WEEKS PRIOR TO LAUNCH DATE

CAMPAIGN LENGTH: 1 TO 3 MONTHS

REPORTING: 45 - 60 DAYS AFTER CAMPAIGN COMPLETION

## FY23 Family Traveller

# Key Benefits



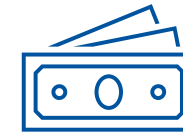
Program inspires travel with impactful content inclusive of a print advertorial, native articles and editorial newsletter content



Family Traveller publishes two magazines per year available in the U.K. through a blend of newsstand, subscription and targeted free distribution



familytraveller.com averages 500,000 sessions per month with an average of 8 page views per session and current social media reach is 1,000,000+ with traffic averaging 4.5 pages per session



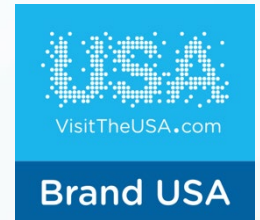
Family Traveller audience has an average household income of \$150,000+ and takes 3 to 4 vacations per year with an average trip length of trip 10 to 12 days



Family Traveller audience has visited the USA at least once, and have the propensity to travel to the USA every 2 to 3 years

FY23 Family Traveller

# Partner Program Details



Promotional Element	Tier One	Tier Two	Tier Three
Print Advertorial	Double Page	Single Page	
Custom Native Articles on Family Traveller website	3 ✓	2	1
2 Week takeover of USA Section on familytraveller.com			
Boosted Facebook posts promoting content	3	2	1
Boosted Instagram posts promoting content	3 ✓	2 ✓	1
Display banners	✓	✓	✓
1 Solus email to subscribers			
Editorial mentions in the Sunday editorial newsletter	3	2	1
Impressions	1.53 M	960k	495k
Time	12 Weeks	8 Weeks	4 Weeks

# FY23 Family Traveller Program Creative Examples

Native Articles



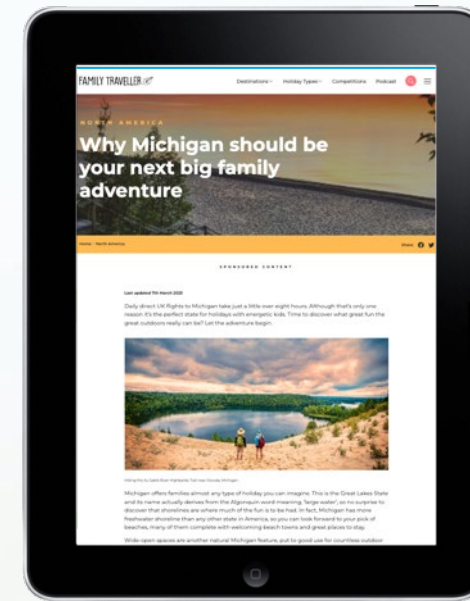
Social Media Promotion



Email Promotion



Display Banners



Double Page Spread (Print - Tier 1 Only)

## Warm up winter in the Caribbean

Beaches all-inclusive Caribbean resorts in Jamaica and Turks & Caicos are the best way to warm up winter this year.

**Your perfect family getaway awaits** this winter at Beaches Resorts in Jamaica and Turks & Caicos. Play on pristine, white sand beaches caressed by crystal clear seas. Spend your family holiday in luxurious rooms or suites and enjoy a whole army of incredibly exciting and fun activities for kids of every age. Only Beaches Resorts has been voted the World's Leading All-Inclusive Family Resorts and only Beaches Resorts can promise you unforgettable family holidays under the year-round Caribbean sun.

**What's included in your holiday at Beaches Resorts:**  
Resorts on the Caribbean's Best Beaches • Unlimited Gourmet™ Dining at 21 restaurants • Choice of 15 Bars and Unlimited Premium Spirits • Kids Programs • Teen Activities • Pirates Island Waterpark • Unlimited Land & Water Sports • Entertainment For All Ages • Spectacular Family Rooms & Suites

**Beaches Turks & Caicos**  
Awarded the Caribbean's Leading All-Inclusive Family Resort, Beaches Turks & Caicos is the resort for families who dream about getting away from it all on an unforgettable all-inclusive holiday. Nestled on Grace Bay, it offers you a wide choice of accommodation styles from Caribbean & Soudie charm to French elegance, Italy's allure and the cool of Key West. The stunning 12 mile stretch of Grace Bay beach with edging turquoise waters, is perfect for water sport keen kids. And scuba, along with legendary dive sites and coral reefs also makes Beaches Turks & Caicos a dream for divers and snorkelers.

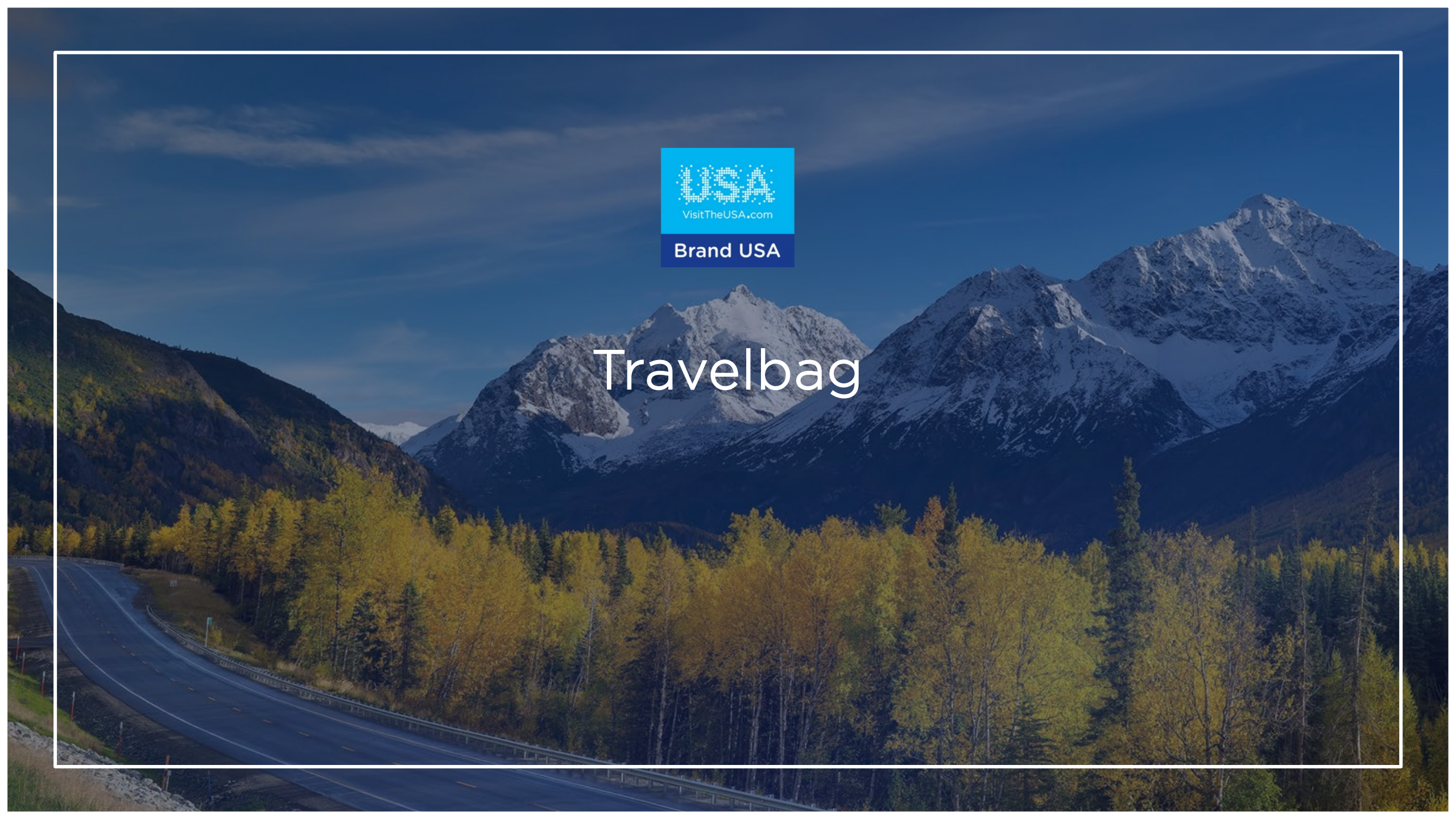
**Beaches Negril, Jamaica**  
Beaches Negril is a carefree zone, in fact, Negril is where "laid back" was invented, and that vibe is still alive and well for families, especially as everything here is included. The resort sits on the widest stretch of Negril's famous Seven Mile Beach. So beach side is where it's all at, from the waterpark and pools to restaurants and bars. Whether you want to adventure or relax, this resort has something for the whole family to enjoy, so you can spend time making unforgettable memories with those you love - one of the many reasons it's been awarded Jamaica's Leading All-Inclusive Family Resort.

**Beaches Ocho Rios, Jamaica**  
Beaches Ocho Rios has something for everyone in the family, from a huge waterpark to a championship golf course, and everything in between. The 22 acres of lush tropical gardens and private white sand beach here are idyllic, there just add more gourmet restaurants, five swimming pools, a dedicated scuba practice pool and endless water sports. So if you're looking for a family beachfront getaway with extra spacious accommodation, the only all-inclusive golf programme for kids and Jamaica's top attractions on the doorstep, Beaches Ocho Rios is the resort to choose.

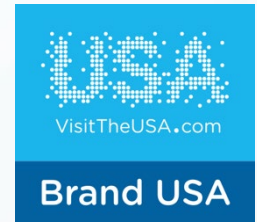
Discover your unforgettable all-inclusive family holiday at Beaches Resorts.  
For more information call 0009 937 9999 or visit [www.beaches.com](http://www.beaches.com)



# Travelbag



# Program Overview



Travelbag is a tour operator that specializes in creating tailor-made holiday packages to a range of US destinations exclusively for U.K. customers for over 40 years. In addition to its online platform, Travelbag also offers a call center and retail shops for their customers to connect with travel agents on building custom itineraries.

The program offers a comprehensive marketing campaign designed to reach a U.K. audience primed for travel planning.

## CAMPAIGN KPIs



REACH  
IMPRESSIONS



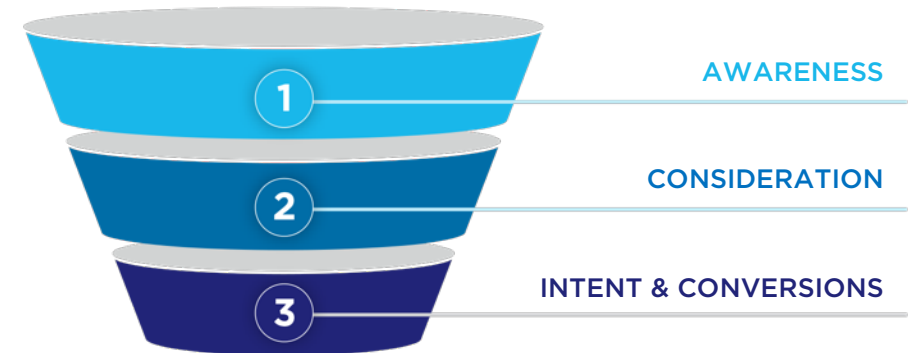
ENGAGEMENT  
CLICKS/CTR



INTENT & CONVERSIONS  
ROOM NIGHTS &  
REVENUE

## STAGE OF TRIP PLANNING

A lower funnel program that drives direct bookings



**IN-MARKET DATES:** ONGOING (EXCLUDING SEP, OCT, JAN, FEB)

**COMMITMENT DATE:** 8 WEEKS PRIOR TO LAUNCH DATE

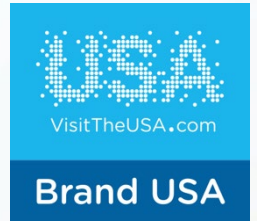
**ASSET COLLECTION DATE:** 6 WEEKS PRIOR TO LAUNCH DATE

**CAMPAIGN LENGTH:** 4 TO 12 WEEKS

**REPORTING:** 45 - 60 DAYS AFTER CAMPAIGN COMPLETION

FY23 Travelbag

# Key Benefits



Travelbag is a trusted and respected brand in the U.K. Travel Industry

Winners at the British Travel Awards (7 Gold and 2 Silver awards in 2021/2022).

Good Housekeeping recommended



Travelbag has access to nearly every bed bank



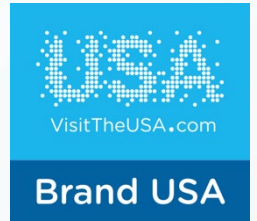
Ability to work with Travelbag on product creation



50% of Travelbag customers stay in more than one destination during a Travelbag trip

## FY23 Travelbag

# Partner Program Details

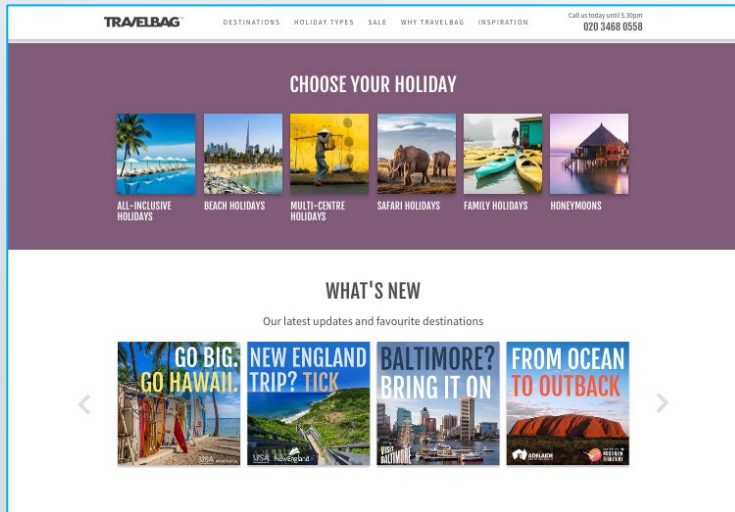


Promotional Element	Tier One	Tier Two	Tier Three	Tier Four
Homepage Banner	✓	✓	✓	✓
Website Page Creation	✓	✓	✓	✓
Travelbag Blog Entry	✓	✓	✓	
Website Retargeting	✓			
Social Media Canvas (Facebook)	✓	✓	✓	✓
Social Media Paid Video Ad (Facebook)	✓	✓	✓	
Dedicated Destination Email (Eshot)	✓	✓		
Offer Inclusion in Travelbag Tactical Emails	2	2	1	1
Email Banner Inclusions	✓	✓		
Offer Inclusion in Half/Quarter Press Ad (i.e., The Daily Mail)	✓	✓		
TV Screens in 6 Shop Windows	✓			
Brand Video Inside 3 Shops	✓			
1 Light Box in 1 Shop Location	✓			
Staff Training Webinar	✓	✓	✓	✓
Impressions	2.6M	1.0M	560k	408k
Time	12 Weeks	8 Weeks	6 Weeks	4 Weeks



# FY23 Travelbag Program Creative Examples

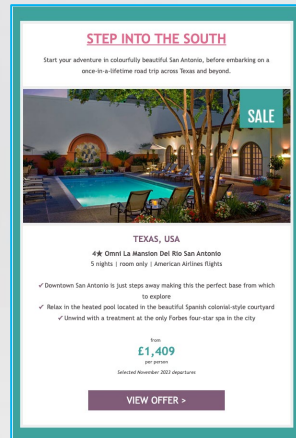
## Homepage Banner



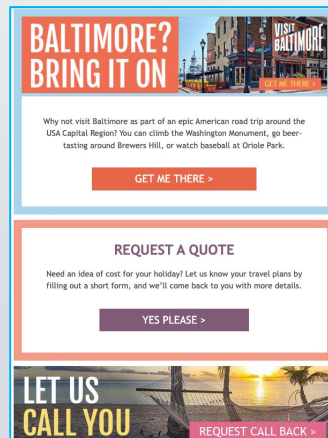
## Eshot



## Email Offer



## Email Banner



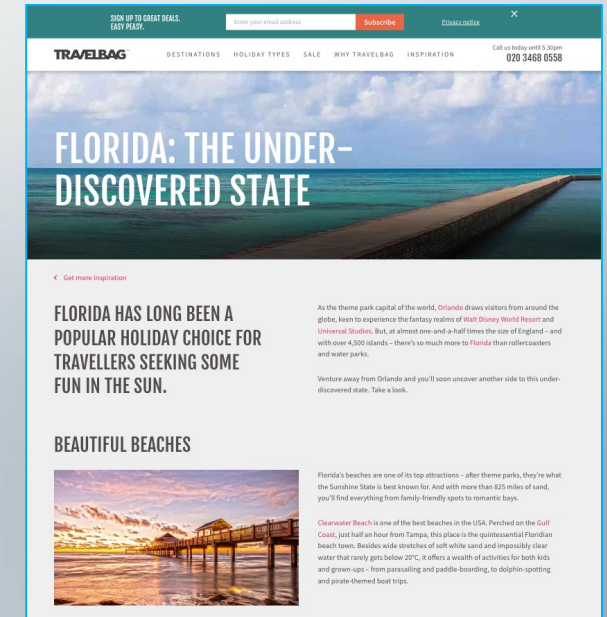
## National Press Offer Insertion



## Facebook Canvas



## Travel Blog



## U.K. Partner Programs

# Optimized Audience Campaign

- Integrated digital media campaign deployed in priority international markets during periods of peak travel planning
- Reach a curated audience of hand-raisers where they are seeking information, throughout the different stages of the travel planning process
- Deepen understanding of the impact and behavior after travelers engaging with this campaign
- Reporting includes measurable hotel booking data and other insights across multiple sources



## Campaign Timing:

U.K. Winter: January – February 2024

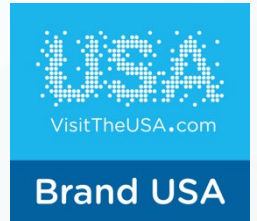
\*Participation Close: 9/1/23

U.K. Spring: March – May 2024

\*Participation Close: 11/10/23

U.K. Partner Programs

# Additional Opportunities Available



Affinity Partnerships  
Destination 101 training Videos  
Global Inspiration Program  
Global Marketplace  
Influencer Partner Inclusion  
Interactive Travel Guide  
JCDecaux  
Optimized Audience Campaign  
Programmatic Media  
USA Discovery Program  
Video Creation & Distribution  
VisitTheUSA Global Sites



Interested in learning more? Please contact us for additional details.



# Quick Poll



# What areas of Brand USA support are of interest to you in the U.K.?

*Select all that apply.*

- a. Trade support
- b. Digital advertising/programmatic
- c. Inspiration level/content creation programs
- d. Tour operator programs
- e. OTA opportunities
- f. Social media/influencers
- g. TV- linear or streaming
- h. Out of home



# Other Important Updates

## Upcoming Program Opportunities

# Road To IPW Webinar Series



### Road to IPW: Regional/Co-Ops Webinar

Thursday, May 4  
12pm ET

- What is Brand USA's framework for cooperative opportunities (singular state and multi-state focused)?
- What kind of results and benefits do these custom opportunities bring to our partners?
- How can partners participate in Brand USA regional/co-op opportunities?

### Road to IPW: Programmatic Webinar

Tuesday, May 16  
2pm ET

- How does programmatic media work?
- How do we use custom targeting to better meet objectives?
- How can we leverage Brand USA's curated audience to create a bigger impact?

### Road to IPW: Market Focus - Canada Webinar

Thursday, May 18  
2pm ET

- What is Brand USA doing in Canada?
- What new research is available?
- What programs are available in Canada?

Last but not least...

# Upcoming Brand USA Activities!\*



May 2023	June 2023	July-August 2023	October 2023	January 2024	February 2024	March 2024	April 2024	July 2024
5/4: Co-Op/ Regional Webinar 5/16: Programmatic Webinar 5/18: Canada Webinar 5/21: Market Education Sessions @IPW May: Canada <i>Into Nature's Wild</i> Road Show	6/6-14: AUS/NZ Mega Fam with Hawaiian Airlines (HI, CA, TX, OR, WA, NV, UT, MA, NY)	7/15: GoUSA TV Storytelling Awards submissions due July: RHS Flower Show July: Japan & South Korea Sales Mission August: Korea: Roadshow with Hana Tour	10/16-19: Brand USA Travel Week in London	India Sales Mission	Mexico Sales Mission Australia B2B	South America Sales Mission	Canada Sales Mission	Japan & South Korea Sales Mission

\*Tentative dates; subject to change  
Road to IPW: U.K. Market Outlook





# Q&A

Road to IPW:  
U.K. Market Update



Thank you!

Road to IPW:  
U.K. Market Update