

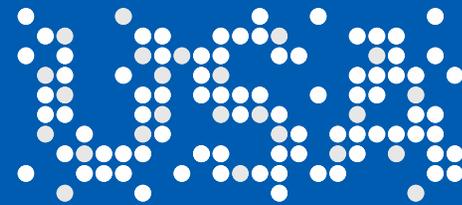
Marketing Committee Meeting

February 25, 2015



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Barbara Richardson

Chair
Brand USA Marketing Committee

Agenda

- Opening Remarks
 - Barbara Richardson, Marketing Committee Chair
 - Call the Meeting to Order
 - Introductions: Management, Invited Guests, Legal Counsel
- Brand USA Update
 - Chris Thompson, President & CEO
- 2015/2016
 - Tom Garzilli, Senior Vice President, Global Partner Marketing and Acting CMO
 - FY15 Strategies and Programs Update
 - Partner Roundtables Report and Satisfaction Survey
 - Key Initiatives and Planning
- Discussion
- Questions/Answers
- Adjourn



Brand USA Marketing Committee



Barbara Richardson
Vice Chair



Caroline Beteta



John Edman



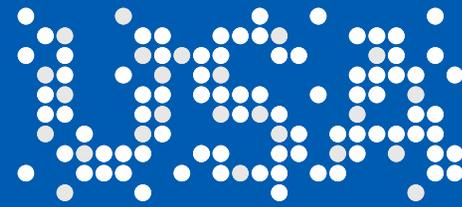
George Fertitta



Randy Garfield



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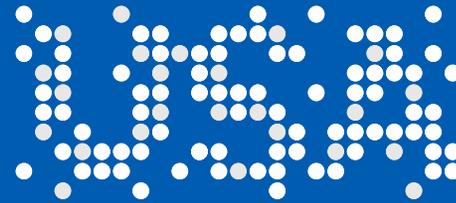
Chris Thompson

President & CEO



Tom Garzilli

Senior Vice President
Global Partner Marketing
& Acting CMO



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Anne Madison

Chief Communications Officer



FY15 Strategies

- Drive Results
- Market the Welcome
- Create Value for Consumers and Stakeholders
- Build and Distribute Dynamic Content
- Continue to Expand Market Presence
- Build and Leverage Industry Collaboration





Drive Results



Research & Analytics: Ongoing Activities

Performance Metrics

- Annual ROI study
- Ad Campaign and partner program results, website/social reporting

Market and Media Prioritization

- Using projections and trend analysis to support budget allocation

Market Intelligence

- Primary consumer studies in 12 markets
- Analysis of acquired data and intelligence (TDM from Tourism Economics, Comscore, MIDT, etc.)

Ad and Creative Testing

- Post wave campaigns
- Ongoing creative testing
- Website behavioral testing

Partner Satisfaction and Intelligence

- Partner surveys and roundtable meetings



Change in Arrivals Methodology

- In January 2014 The National Travel and Tourism Office implemented an electronic system to better count one-night stays
- Change in methodology will inflate 2014 overseas arrivals growth, and will not be an issue thereafter
- Based on the overlap period of Jan.- Feb. 2014, the overall growth could be inflated as much as 2.5 percentage points
- The inflation varies greatly market to market, individual analysis is important for understanding the trend
- As part of the annual ROI study, Brand USA will release an estimate of actual arrivals growth
- Overview available at **thebrandusa.com**



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Old and New Methodology Comparison

Year-Over-Year Growth in Non-Resident U.S. Arrivals
(January-April 2014)

	Old Arrivals Growth	New Arrivals Growth	Variance
Total Overseas	4.3%	9.6%	5.3%
Mexico	21.9%	21.9%	0%
Canada	-1.4%	-1.4%	0%
Grand Total	5.8%	8.1%	2.3%

Source: NTTO





Market the Welcome

Market the Welcome Update

- **Communicating and Promoting U.S. Entry Process and Policy**
- **Welcoming and Thanking International Travelers**
 - International Arrival Halls
 - Toolkits, Marketing Materials and Redesigns in Consular Areas of U.S. Embassies
- **Supporting Travel & Tourism to Grow Our Economy and Create More Jobs**
 - Launching a new National Goal to provide a best-in-class arrivals experience to an ever-increasing number of international visitors.
 - Implementing new Action Plans at 17 of the USA's largest airports—accounting for nearly three out of four international travelers to the United States—to improve the arrivals process for international travelers.
 - Announcing \$20 million in public-private partnerships supporting the Airport Action Plans to install 340 additional automated passport control kiosks that reduce wait times by up to 30 percent.
 - The Department of Homeland Security taking steps to improve the arrivals process at all airports, including eliminating the need for air passengers to complete the paper 6059b Customs Declaration form upon arrival by the end of 2016.
 - Airport action plans can be found on the Customs and Border Protection website: <http://www.cbp.gov/travel/travel-tourism>



Create Value for Consumers & Stakeholders



Create Value for Consumers and Stakeholders:

● Q3 Apr- Jun

- TV Programming
 - Jeni & Olly
- Road Trips (Social Media & National Geographic)
- Ongoing Social engagement-across all markets ongoing
- Culinary
 - Content Hub
 - Expo Milano
 - Culinary Guide

continue

- Content Hubs
- Expo Milano
- Food Network- “30 Chefs” Vignettes
- National Parks Television Series - Travel Channel
- Giant-Screen Film Pre-Launch Activities

● Q4 Jul- Sep

- Global Content Partnerships





Build and Distribute Dynamic Content

Build and Distribute Dynamic Content

- 2015-2016 – Launching of our Content Strategy
 - Content – created, curated, organic
 - Dynamic and Scalable
 - Measurable by real-time analytics and consumer feedback
 - Leading global media brands
- Two Platforms
 - Great Outdoors and Urban Excitement
- Channels
 - Giant-Screen Film
 - Television
 - Social/Digital
 - Print & OOH
 - Trade



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Build and Distribute Dynamic Content

- A global partnership with BBC “The United States through Film”
- More than 3,000 Brand USA :30 spots running across 6 regions

- South Asia
- Asia Pacific
- Europe
- Middle East
- Latin America
- South Africa



- Plus 1,300 spots feature 9 different 2-minute vignettes featuring award-winning filmmakers from the USA sharing their stories about destinations that have influenced their work.

- New York City
- Los Angeles
- Brooklyn
- Memphis
- Richmond
- Texas
- Miami
- Utah
- Chicago



- Can be viewed on DiscoverAmerica.com and YouTube
- Digital impressions: More than 32 million



Great Outdoors 2015-16 Campaign

- The United States of Great Outdoors Content Hub and Social Platform
- Giant-Screen Film—filming continues
- Film premiere events for consumer and trade-fall '15 and winter '16
- Pre-sold approx. 1 million tickets in USA theatres
- Multi-channel consumer and trade advertising throughout 2015 and 2016



WILDLIFE
The 15 Most Adorable Animals in U. S. Parks

LOREM IPSUM DOLOR SIT AMET, CONSECUTUR ADIPISCING ELIT AMET.



ADVENTURES
One Brazil Blogger's Hunt for Terrifying Adventure

LOREM IPSUM DOLOR SIT AMET, CONSECUTUR ADIPISCING ELIT AMET.



NATURE
Which U.S. Park is Home to 50 Types of Butterflies?

LOREM IPSUM DOLOR SIT AMET, CONSECUTUR ADIPISCING ELIT AMET.



ADVENTURES
How Ben Ford Cooks the Perfect Park Feast

LOREM IPSUM DOLOR SIT AMET, CONSECUTUR ADIPISCING ELIT AMET.



HOW TO GET THERE
On the Rails: National Parks You Can Reach By Train

LOREM IPSUM DOLOR SIT AMET, CONSECUTUR ADIPISCING ELIT AMET.



STATE SPOTLIGHT
Top 10 Things You Will Love About the Everglades

LOREM IPSUM DOLOR SIT AMET, CONSECUTUR ADIPISCING ELIT AMET.



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Great Outdoors

2015-16 Campaign

- Media spin-offs –
TV series with Travel
Channel summer/fall
2015
- Digital/Social
 - Road Trips
 - Travel Like a Local



Urban Excitement

Great American Food Stories

- Award Winning Culinary Guide – Phase 2 with in-country promotions
- United States of....Content Hub + Social platform
- Multi-Channel marketing campaign in Canada, UK and Japan
- International Food Network – “30 Chefs, 30 Days” – vignettes to air globally in July 2015
- Travel Channel – Jeni & Olly American Adventures- expanded episodes



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Urban Excitement

Great American Food Stories

- Expo Milano 2015: May 1-Oct 31
 - .25-30 million people are expected to visit
 - Many iconic American brands—companies like 3M, Boeing, Microsoft, GE, etc.—are stepping up to help the United States put its best face forward.
 - Brand USA will showcase Food Truck Nation, a series of six authentic food trucks with a rotating menu that celebrates regional foods from across the United States
 - The food trucks and other opportunities around the USA Pavilion are a platform that Brand USA is offering to its destination partners . Several destinations are coming in for three-week periods with branding on the trucks, menu items and other activations.



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Discover America with Peter Greenberg

- Produced and hosted by Peter Greenberg, multi-E Emmy Award-winning producer and the Travel Editor for CBS News
- Modeled after Peter's Royal Tour series for public television
 - King of Jordan
 - President of Mexico
 - Prime Minister of New Zealand
 - Prime Minister of Israel
- In Discover America, Peter will be guided by America's own set of royalty
 - Global stars of film, television, music and sports, who will give Peter the "royal tour" of their favorite places, journeys and experiences within the states where they were born, raised or live
- Distribution via Brand USA's international media partners and other platforms
- Initial season comprised of five 30-minute episodes, each devoted to a single state (South Carolina, Alaska, Louisiana in production)
- Expand the project to all 50 states, the 5 territories and the District of Columbia over a 3-year period



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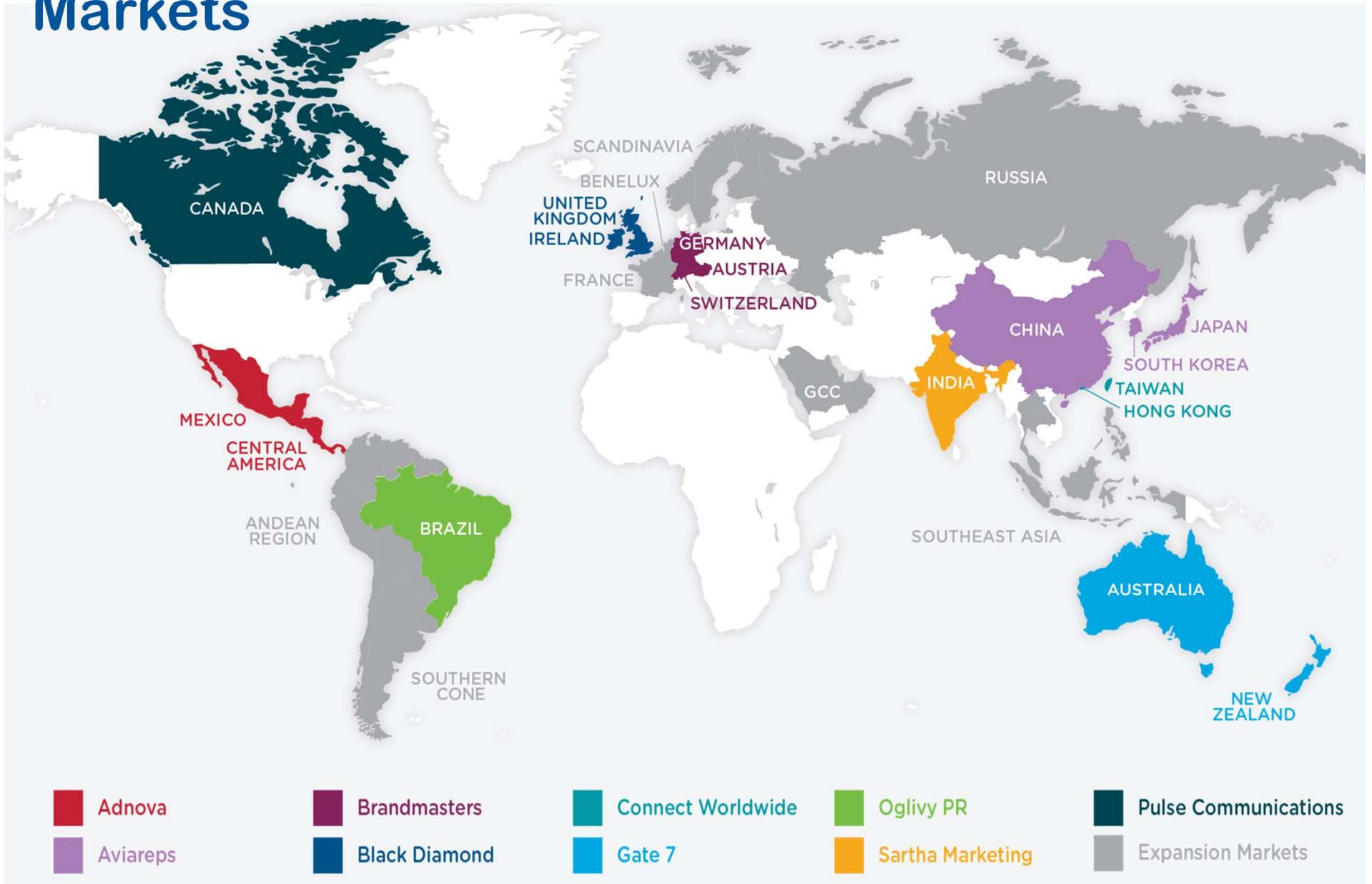
Continue to Expand Market Presence



Consumer Marketing Plan – Have Expanded to 14 markets that generate 81% of inbound travel to the USA



International Representation Expanding to 25 Markets





Build and Leverage Industry Collaboration



Partner Feedback Study – Key Takeaways

- Methodology
 - Mix of partners of different levels, destinations and types
 - Each interview lasted about 45 minutes
 - 67 total completed interviews
- Partnership with Brand USA
 - Overall, feedback was positive: “collaborative,” “optimistic,” “developing,” and “value add”
 - Smaller partners rely on Brand USA for the bulk of their international marketing and see great value in it
 - Many partners feel Brand USA is doing a great job in selling the USA as a “whole” destination
 - Most said they would continue to invest with Brand USA; many said they are hoping to grow investment



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Partner Feedback Study – Key Takeaways

- Overall international marketing challenges for Partners
 - Assist with understanding the many distinct international markets (i.e. cultural nuances, language, competition, etc.).
 - Measuring ROI
 - Research, to include understanding travel and marketing trends
 - Improve and expand social media outreach
- Challenges to working with Brand USA
 - Too many programs, lack of understanding them, what they include and their benefits to specific partners
 - Measuring program success and clear results/effectiveness
 - Brand USA logistics and processes are complicated and lengthy
 - Timing: not enough time to take advantage of some programs, and some are presented too late in partners' planning process



Brand USA Partner Roundtable Meetings



- Held in DC on January 26-28
- 30 total participants on three roundtables
 - CMO
 - Partner Programs
 - Global Development



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Brand USA Partner Roundtable Meetings



- Participant Survey Combined Results
 - Quality of the content: 8.92
 - I feel well informed about Brand USA's strategies and Initiatives: 7.96
 - I had the opportunity to contribute my ideas and insights: 9.54
 - The meeting provides overall value to my organization: 9.33



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Brand USA Partner Roundtable Meetings



● Key Points for the meetings

- More time together for collaboration and discussion
- Regular schedule of meetings
- Clearer direction at the outset

● Next Meetings

- Update meeting for entire group at IPW May 30-June 3
- Individual meetings in fall 2015
- Full event January 2016

● Key Learnings Overall

- More clarity on programs and offerings
- More and better research on a localized basis
- Partners want and expect Brand USA to be pioneers abroad and provide information and opportunity - primarily in emerging markets



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18 MONTH PLANNING

- Next 6 months
 - Improve organizational structure to better address our mission
 - Global agency solution in place- selections made and contracting complete
 - New company brand and URL for website
 - Web re-build solution in place and under way
 - Unifying Statement/Branding for consumer and trade content
- Next 12 months
 - Continued optimization of Brand USA partner programs, and digital/social content strategies
 - Create sustainable funding sources



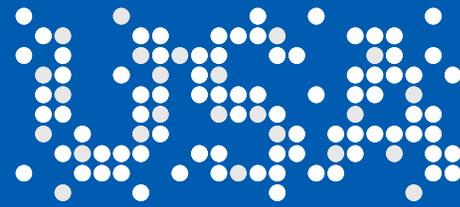
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18 MONTH PLANNING

- Next 18 months and beyond
 - Pioneering in emerging markets- primarily China and India
 - Provide media and marketing efficiencies, and an increased number of tactical solutions in the more established markets
 - Lead and innovate in improving on the existing global marketing ecosystem



Discussion and Q/A



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Thank You!

Travel Industry Information

@BrandUSA on Twitter
TheBrandUSA.com

Consumer Information

@DiscoverAmerica on Twitter
Facebook.com/DiscoverAmerica
DiscoverAmerica.com



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