



Marketing Committee Meeting of the Brand USA Board of Directors

March 22, 2016

USA

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Brand USA

Opening Remarks and Introductions



Barbara Richardson

Vice Chair, Board of Directors
Chair, Marketing Committee

Marketing Committee Meeting Agenda

Opening Remarks

- Call the Meeting to Order
- Introductions: Management, Legal Counsel, and Invited Guests

Approval of the Minutes from the November 10, 2015 Meeting*

CEO Report

- CMO Roundtable Meeting
- International Representation Team Meeting
- Worldwide Premier of “National Parks Adventure” in Washington, D.C.
- 2016 U.S.-China Tourism Year

Marketing Updates

- New Vice Presidents Introductions
- Q1-FY2016 Marketing Highlights
- “National Parks Adventure” Update
- 2016 Bridge Campaign Launch

FY2017 Business Planning Update

Discussion and Closing Remarks

Adjourn Meeting

Brand USA Marketing Committee



Barbara Richardson
Chair



John Edman



Kyle Edmiston



Randy Garfield



Rossi Ralenkotter



Mark Schwab

Executive Management



Chris Thompson
President & CEO



Anne Madison
Chief Strategy &
Communications Officer



Don Richardson
Chief Financial Officer



David Whitaker
Chief Marketing Officer



Tom Garzilli
SVP, Global Sponsorships



Karyn Gruenberg
SVP, Partner Marketing &
Strategic Alliances

CEO REPORT



Chris Thompson

President & CEO

Brand USA

Marketing Committee Meeting Agenda

CEO Report

- CMO Roundtable Meeting
- International Representation Team Meeting
- Worldwide Premier of “National Parks Adventure” in Washington, D.C.
- 2016 U.S.-China Tourism Year

CMO Roundtable Meeting

February 10 CMO Roundtable Meeting

- CMOs in attendance helped us “open” our newly renovated office space following a full agenda of meetings/discussions
 - New marketing campaigns
 - New website
 - International Visitation Trends
- Following the meeting, we attended the DMAI Foundation Dinner where the National Park Service was honored



International Representation Team Meeting

February 11 International Rep Team Meeting

- 40 representatives from 24 markets attended this one-day meeting where we provided updates on our marketing strategies and kicked off the FY2017 planning process
- Following the meeting, we attended the Worldwide Premier of “National Parks Adventure” in Washington, D.C.



Worldwide Premier of “National Parks Adventure”

**Worldwide Premier of “National Parks Adventure”
held in Washington, DC on February 10**

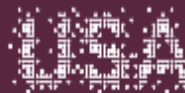
- Special Guests included Secretary Pritzker and Secretary Jewell
- Nearly 400 attendees
- Screenings throughout the world began showing in theaters in 12 countries on February 12



MACGILLIVRAY
FREEMAN
FILMS

 **Expedia**

 **SUBARU**



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2016 U.S.-China Tourism Year

On September 25, 2015, the **United States and China** announced an agreement for a **year of tourism cooperation**.



- Led by the **Department of Commerce** and the **China National Tourism Administration**
- **Focused on three mutually beneficial areas:**
 - Enhanced travel and tourism experiences
 - Enhanced cultural understanding
 - Enhanced appreciation of natural resources
- **Brand USA efforts focused on:**
 - **Educating** (China Ready Programs, USA Discovery Program, Road Shows)
 - **Promoting** (USA Campaign, MegaFams, Sales Missions)
 - **Sharing** (Social Media Campaigns)

CMO Report and Marketing Updates



David Whitaker

Chief Marketing Officer
Brand USA

Marketing Committee Meeting Agenda

Marketing Updates

- New Vice Presidents Introductions
- Q1-FY2016 Marketing Highlights
- “National Parks Adventure” Update
- 2016 Bridge Campaign Launch

The Brand USA Marketing Organization





MARKETING HIGHLIGHTS Q1-FY 2016

USA

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Brand USA

2016 CMO Roundtable



2016 CMO Roundtable Participation

- Rolando Aedo - Executive Vice President/Chief Marketing Office, Greater Miami Convention and Visitors Bureau
- Lisa Becket – Senior Vice President, Marketing & Sales Strategy, Walt Disney Parks & Resorts Worldwide
- Lynn Carpenter – Vice President of Marketing, Visit California
- Melissa Cherry – SVP, Marketing and Cultural Tourism, Choose Chicago
- Danielle Courtenay – CMO, Visit Orlando
- Fred Dixon – President and CEO, NYC & Company
- Timothy Fennell – Tourism Deputy Director, Texas Office of the Governor Economic Development & Tourism
- Andrew Flack – Vice President, Global Marketing, Hilton Worldwide
- Cory Jobe – Director, Illinois Office of Tourism
- Kerri Verbeke Kapich – Senior Vice President of Marketing & Strategic Partnerships, San Diego Tourism Authority
- DT Minich – President/CEO, Experience Kissimmee
- Alice Norsworthy – EVP, Marketing & Sales, Universal Orlando Resort
- Teresa O'Neill – Vice President, Global Sales, Travel Oregon
- Paul Phipps – Chief Marketing Officer, VISIT FLORIDA
- Don Skeoch – Chief Marketing Officer, LA Tourism
- Noah Tratt – Global Vice President, Expedia Media Solutions
- Cathy Tull – Senior Vice President of Marketing, Las Vegas Convention and Visitors Authority



SOCIAL FIRST STRATEGY:
The Ultimate Selfie Exercise

FY16 Engagement-based Buying

On Social Media, Engagement = Behavior

- For FY16, we based our planning on behavior versus reach, and targeted those based on previous interactions.
- Driven by Facebook, the result of this approach was that at a similar investment, almost double the number of impressions were generated.

	Q1FY15	Q1FY16	Results
Impressions	32 million	61 million	↑ 91%

We also received 24 million organic impressions
(+9% growth YOY, bucking the platform trend)

Note: Does not include China





Global Trade Development Q1-FY 2016 Highlights

USA

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Brand USA

Vakantiebeurs 2016 (Netherlands)

- 13–17 of January, 2016
- Utrecht, Netherlands
- The USA Pavilion hosted 26 exhibitors; organized by the Visit USA Netherlands Committee
- Highlights
 - The USA was the host country sponsor with additional branding through the trade show floor
 - Screening of the National Parks Adventure trailer at the official Vakantiebeurs opening ceremony
 - Open café area hosting exhibitor networking events, and providing lounge area to exhibitors and trade show visitors

Vakantiebeurs 2016 (Netherlands)



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VISIT USA
THE NETHERLANDS

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FITUR (Spain)

- 20-24 of January, 2016
- Madrid, Spain
- 23 exhibitors
- Hosted ribbon cutting & networking reception with Ambassador Costos
 - Organized by Brand USA, the U.S. Embassy, the U.S. Commercial Service, and the Visit USA Committee Spain
- Participation of:
 - U.S. Ambassador to Spain James Costos
 - President of Visit USA Committee Spain Victor Muntane Pavillard



MATKA 2016 (Finland)

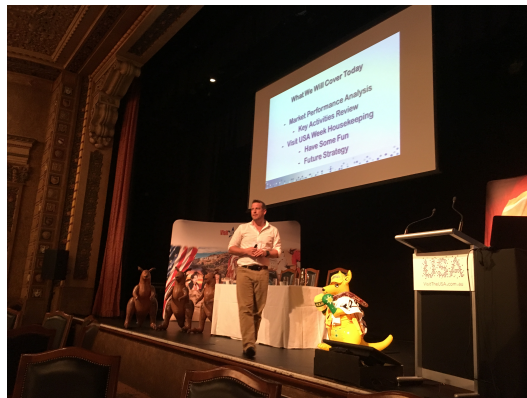
- 21–24 of January, 2016
- Helsinki, Finland
- The USA Pavilion hosted 11 exhibitors; organized by the Discover America Finland Committee Committee
- Highlights
 - The U.S. Ambassador to Finland, Mr. Charles C. Adams, Jr., cut the ribbon and opened the Brand USA Pavilion at MATKA.
 - U.S. Commercial service was represented by Rick de Lambert, Senior Commercial Officer and Katie Janhunen, Commercial Specialist
 - A. Klapper and K. Janhunen represented the USA at the Destinations Breakfast (DMOs and media), and the Destinations Networking hour (DMOs and tour operators)

MATKA (Finland)



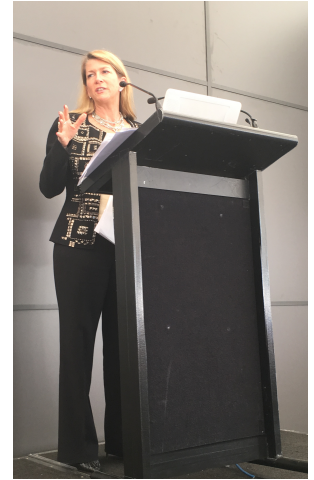
Visit USA & Brand USA Australia Expos & B2B

- 15–18 of February, 2016
- Melbourne, Brisbane and Sydney
- Over 70 U.S. suppliers
- B2B had the participation of
 - U.S. Consul General Hugo Llorens
 - Outgoing Visit USA President Janette Davies
 - Incoming Visit USA President Kylee Kay
 - 1,712 confirmed appointments



International Media Marketplace (Australia)

- 19 of February, 2016
- Sydney, Australia
- Brand USA was Headline Sponsor
- Largest travel media event ever held in Australia
- 57 U.S. exhibitors
- 110 journalists
- 40 media appointments held by Brand USA



International Media Marketplace (UK)

- 14 of March, 2016
- London
- Brand USA was Headline Sponsor
- Largest travel media event ever held in London
- 29 U.S. exhibitors
- 360 journalists
- ## media appointments held by Brand USA

New Zealand Expos

- 22-23 of February, 2016
- Christchurch & Auckland
- Over 70 suppliers
- Over 430 buyers
- 1st ever New Zealand Expos organized solely by Brand USA
- Participation of:
 - U.S. Ambassador to New Zealand Mark Gilbert



ANATO (Colombia)

- 24-27 of February, 2016
- Bogotá, Colombia
- 40 exhibitors
- First Brand USA Pavilion at ANATO
- Hosted ribbon cutting & networking reception with AmCham
 - Organized by Brand USA, the U.S. Commercial Service, and AmCham



VITRINA
TURISTICA
ANATO 2016



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Guangzhou International Travel Fair (China)

- 24-26 of February, 2016
- Guangzhou, China
- 24 U.S. Industry Partners
- 780 Hosted Buyers
- 158 Media
- Brand USA – Largest booth and international audience
- Awarded Most Popular Destination 2016



Danish Travel Show (Denmark)

- 26–28 of February, 2016
- Brand USA supported the Discover America Denmark committee, and Brand USA was the partner country at the travel show



Brand USA China Mission

- 28 of February to 4 of March, 2016
- Beijing and Shanghai
- 37 U.S. Industry Partners
- 250 Trade Participants (buyers and media)
- 2,000 Partner Meetings
- In conjunction with the launch of the 2016 U.S. China Year of Tourism



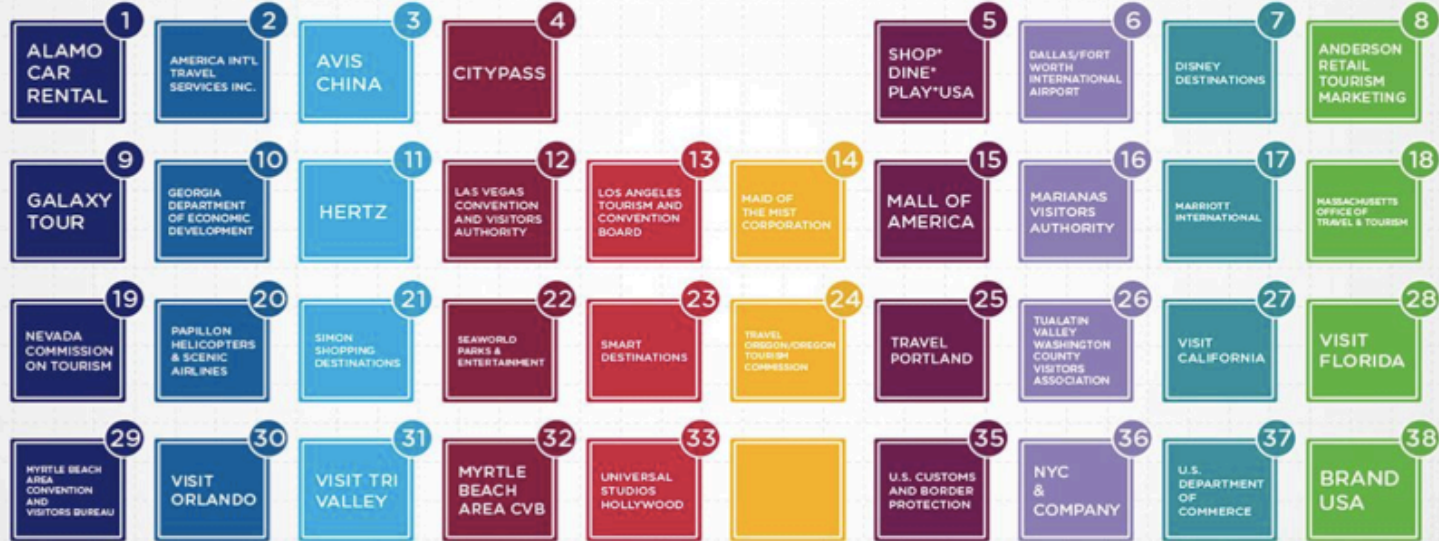


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STAGE

SCREEN

SCREEN





USA Travel Show - Copenhagen

- 7 of March, 2016
- Copenhagen, Denmark
- The Discover America Denmark Committee hosted the USA Travel Show showcasing over 70 exhibitors; Brand USA launched the *National Parks Adventure* film
- 101 Trade Participants (buyers and media)
- Highlights
 - Screening of the *National Parks Adventure* Film; the U.S. Ambassador to Denmark, Mr. Rufus Gifford addressed the audience followed by the Brand USA sponsored brunch, U.S. Commercial service was represented by Bjarke Fredriksen, Senior Commercial Specialist

USA Travel Show - Copenhagen



Ambassador Rufus Gifford arrives, escorted by Karin Gert Nielsen of Discover America Denmark



More than 100 U.S. exhibitors participate in 1x1 appointments with the travel trade



Chief Strategy & Communications Officer and SVP, Partner Marketing & Strategic Alliances Karyn Gruenberg provide updates on Brand USA results and new marketing efforts

ITB Berlin 2016

- 9-13 of March, 2016
- Berlin, Germany
- Brand USA Pavilion hosted 225 exhibitors
- Brand USA Events
 - U.S. Embassy Round Table with the U.S. Ambassador to Germany Mr. John B. Emerson; Kelly Craighead, Executive Director NTTO; Hans Gesk Visit USA Germany President; Dale Tasharski Minister Counselor for Commercial Affairs; Michael Richardson, Commercial Counselor; Cindy Biggs, Principal Commercial Officer; Elizabeth Walsh, Commercial Service Specialist
 - Cocktail reception open to all U.S. exhibitors
 - VIP Lunch hosted by Brand USA together with key Germany partners
 - Represented at the Visit USA Media Breakfast

ITB Berlin 2016



WTM Latin America (Brazil)

- 29 of March, 2016
 - Brand USA Brazil B2B Sessions – Rio de Janeiro & São Paulo, Brazil
 - WTM Latin America – São Paulo, Brazil
 - 30 Partners

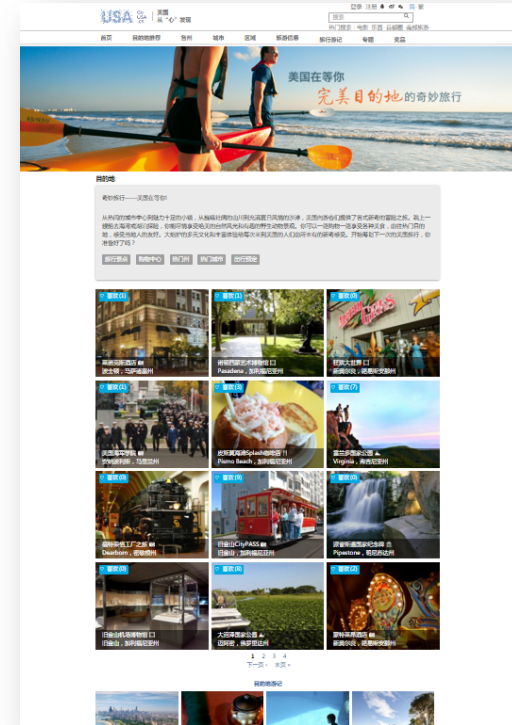


Multi-Channel Q1 Summary

- Targeted, in-market campaigns in Brazil, China, Germany, Mexico and the UK w/ special golf focus
- 67 total partner commitments across all 5 campaigns
- Deliverables created:
 - 5 language-specific magazine inserts created – print & digital for each – with 136 total pages of co-branded, custom content
 - 56 sets of co-branded banner ads and content marketing campaigns (Brazil, Germany, Mexico and the UK)
- Distribution executed (sans China):
 - Across Brazil, Germany, Mexico and the UK, activation partner promotions netted in hundreds of thousands of bookings with a \$90 million revenue value
 - 142 million brand impressions across Outbrain and Taboola content marketing channels
 - 39 million brand impressions via banner ad campaigns – with a CTR of .24% (3x the industry benchmark)
 - 7.6 million social impressions
 - 1.8 million digital page views for the digital versions across Brazil, Germany, Mexico and the UK
 - 1.8 million magazine inserts distributed with the top travel publications in Brazil, Germany, Mexico and the UK
 - 220,000 clicks to promoted content

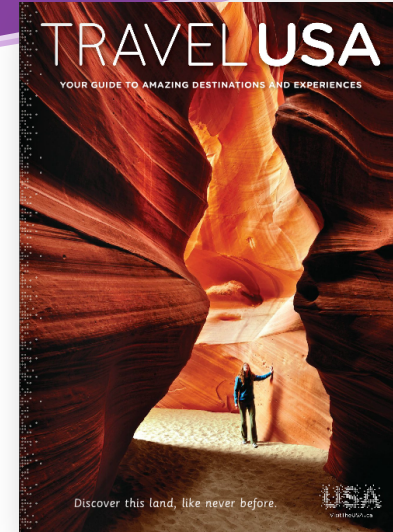
Multi-Channel Q1 Summary (China)

- With the uniqueness of the China audience, non-print content creation and distribution varies from the other countries
- Additional non-print deliverables created:
 - (8) 25-minute TV episodes for broadcast distribution
 - (40) 2-minute vignettes for digital and OOH distribution
 - Campaign-specific subsite on GoUSA
- Distribution executed (China only):
 - 1.6 million impressions across broadcast channels for the 8 episodes
 - 28 million impressions via metro and digital promotions for the 40 vignettes
 - 222,000 page views for the subsite on GoUSA
 - 1.7 million digital page views for the Chinese digital insert
 - 108,000 magazine inserts distributed with one of the top travel publications in China



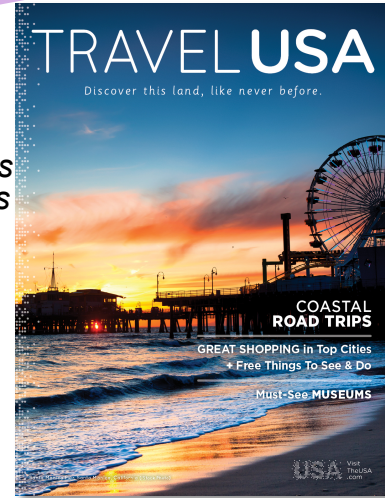
Inspiration Guide 2016

- *2016 Inspiration Guide is in the final stages of production – half of the language versions are in-market as of March 2016, and the rest will be in-market this Spring*
- 187 partners participating across almost all 55 states and territories
- Deliverables created:
 - 13 language-versions created – print & digital for each
 - 196-page 'Travel USA' travel guide
 - 40 co-branded, dedicated digital versions across all languages for government and trade partners
 - In-language promotions across Brand USA-owned and paid channels
- Distribution planned:
 - 45 million promotion impressions served (owned, social, OTA sites, GDN)
 - Includes new social promotions through Instagram and Pinterest
 - 575,000 guides with physical distribution in 55+ countries (core countries: Australia, Austria, Brazil, Canada, China, France, Germany, India, Ireland, Japan, Mexico, New Zealand, Scandinavia, South Korea, Switzerland, Taiwan and the UK)



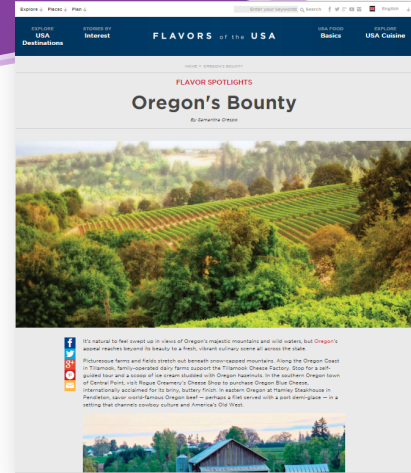
Multi-Channel Winter/Spring 2016

- 2016 Winter campaigns (Australia, Canada and UK) are currently wrapping and Spring campaigns (Brazil, Canada, China, France, Germany, Japan and Mexico) launch in the next couple of months
- 181 total partner commitments across all 12 campaigns
- Deliverables created:
 - 12 language-specific magazine inserts created – print & digital for each – with 264 total pages of co-branded, custom content
 - 150 sets of co-branded banner ads and content marketing campaigns (all campaigns sans China)
- Distribution planned:
 - 20.6 million impressions via co-branded banner ad campaigns on Expedia – the new global activation partner
 - 103 million impressions via co-branded banner ad campaigns – now on the Google Display Network (GDN)
 - 93,500 clicks across Outbrain and Taboola content marketing channels
 - 5.7 million magazine inserts distributed with the top travel publications in each country



Culinary Initiative 2016

- 2016 Culinary Initiative is in its final stages and will launch starting May 2016
- 25 partners participating from 11 states
- Deliverables to be created:
 - 33 partner-sponsored content pages (then translated for all Brand USA's language sites)
 - 84-page culinary guide
 - International influencer campaign with hosts visiting participating partners (hosts from Canada, South Korea or UK)
 - 9 culinary-focused videos
- Distribution planned:
 - 295,000 engagements with co-branded promotions driving to Brand USA's Culinary Hub
 - 100,000 culinary guides with physical distribution in 13 countries (Australia, Austria, Brazil, Canada, France, Germany, India, Japan, Mexico, South Korea, Switzerland, Taiwan and the UK)



LOA Partnership Highlights: Q1 2016

- 374 media contracts executed from LOA contributions in Q1 – 100% within procurement compliance procedures (up from 304 in Q1 FY15). These contracts represent over \$22 million of leveraged marketing to support Brand USA partners.
- To date (Oct.-Mar.) \$28.3 million in LOAs secured from 89 partners (up from \$22.2 million pace in 2015).



NATIONAL PARKS ADVENTURE UPDATE



National Parks Adventure

- Part of an integrated strategy that includes:
 - 3D, giant screen documentary film
 - “America the Beautiful,” an 8-episode TV series in partnership with Travel Channel (airing globally)
 - “The United States of Great Outdoors” content hub
 - Content inclusion in Brand USA assets: Inspiration Guide, Multi-Channel programs, digital/social media, and more



National Parks Adventure as a Revenue Driver

Total Investment:
\$13.65 Million
over 36 Months

- Total Production Costs:
\$10.15 million
- Total Distribution/Marketing Costs: \$3.5 million
- Over 4 million international audience reached in next 18 months (10 million including USA)
- Expect to exceed \$44 million of media reach outside of USA

Total Return:
\$37.70 Million in Revenue
and \$42 Million+ in Media Value

- Cash Contributions: \$6 million to date
- In-Kind Contributions: \$15.7 million to date
- Projected Contributions: \$8 million
- Box Office-Producer Revenue: \$8 million*

* International and Domestic

National Parks Adventure

- **Over the next four months – film appearing in nearly 100 museums and science centers in 12 countries**
 - Film will run for one year
 - 40 international theaters in Canada, Mexico, Europe, Australia, China, Japan, and India
- **Partnering with theater operators and leveraging Brand USA channels to promote the film**
 - Providing co-op dollars directly
 - Incorporating the film as call to action in Brand USA advertising and Digital/Social programs
 - Holding events in many cities worldwide

National Parks Adventure

Tier I Events:

- Washington, DC Premiere - February 10, 2016
- London - February 16, 2016
- Mexico City - April 4, 2016
- Sydney - April 2016
- China – April/May 2016 Beijing, Shanghai, Guangdong, Chong Qing, Dong Guan, Hong Kong
- Tokyo – May 2016
- Toronto, Montreal – September 2016
- Mumbai – September 2016

'America Wild: National Parks Adventure'

– UK film premiere

- UK & Ireland film premiere
- Date: Tuesday 16th February, 2016
- Venue: London's BFI Odeon IMAX
- The UK's largest cinema screen – located at Waterloo, central London (pictured), with a capacity of 500
- Film partners: Expedia, Inc., Subaru of America, Inc. and REI
- Total attendees: 139 (excluding Brand USA)





National Parks Adventure

- Tier II Events - sponsored:
 - Canada: four-six cities
 - Europe; Paris, Nuremburg, Frankfurt, The Hague, Lucerne, Copenhagen, others may be added
 - Australia; Melbourne
 - China: five cities
 - Japan: five cities

National Parks Adventure

What Theater Directors are Saying

“Everybody was thrilled by the beautiful pictures and thought it was one of the best and most beautiful films they had ever seen at the Tycho Brahe Planetarium.”

— **Peter Bak-Larsen, CEO, Tycho Brahe Planetarium, Copenhagen**

“This film is so well received! By press and by the audience. The attendance is really good, the weather is helpful and we are happy.”

— **Alexandra van der Zee, SMP Marketing, Omniversum, The Hague**

National Parks Adventure

What Theater Directors are Saying

"America Wild is a stunning film and our audiences love it! We are so very happy that we choose to launch our new IMAX with laser and 12 channel audio system with this film."

— **Brenda Tremblay, COO, Science North, Sudbury, Ontario, Canada**

"The film has had a superb opening with a notably higher occupancy than other shows in the month of February. In fact, we are increasing the number of shows per day to accommodate demand. We are off to a great start!"

— **Zarth Bertsch, Director, Theatres, Smithsonian Institution**

"National Parks Adventure is a soaring, patriotic tribute to the national parks. Our visitors sure love the film - particularly in 3D as our opening weekend was close to a sellout for all 14 runs of the film."

— **Brad Harris, Senior Director of Visitor Services, American Museum of Natural History, New York**

National Parks Adventure

Great Press Worldwide

- Dozens of great reviews from around the world in all forms of media
- International media coverage in London Times, Australia's Daily Telegraph, Netherlands Hague Newspaper, Mexico's Mosaico magazine and many more
- Movie media coverage featured on:

Entertainment
WEEKLY

FOX

THE
Hollywood
REPORTER

CNN

abc

The Washington Post

CHICAGO
SUN-TIMES

Los Angeles Times

...and many more

USA
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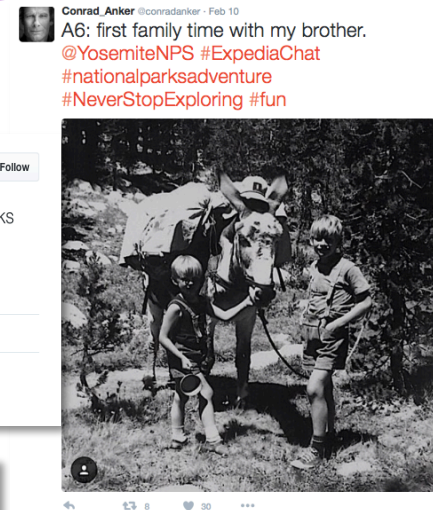
America's Treasures Update

- On schedule to make next three critical deliverables:
 - June 1 - first draft of script
 - Aug 1 - final script and production plan
 - Oct 1 - begin principal photography

National Parks Adventure Trended During the U.S. Premiere (02/10/16)

**Nearly 5,600 tweets about the topic,
exposed to 8.6 million users**

- Organized international Twitter chat with key film partners Expedia, REI, MacGillivray Freeman Films and the NPS for the *National Parks Adventure* film premiere
- Organic impressions on Twitter skyrocketed thanks to engagement with #ExpediaChat, which trended on Twitter's homepage





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FY16 BRIDGE CAMPAIGN

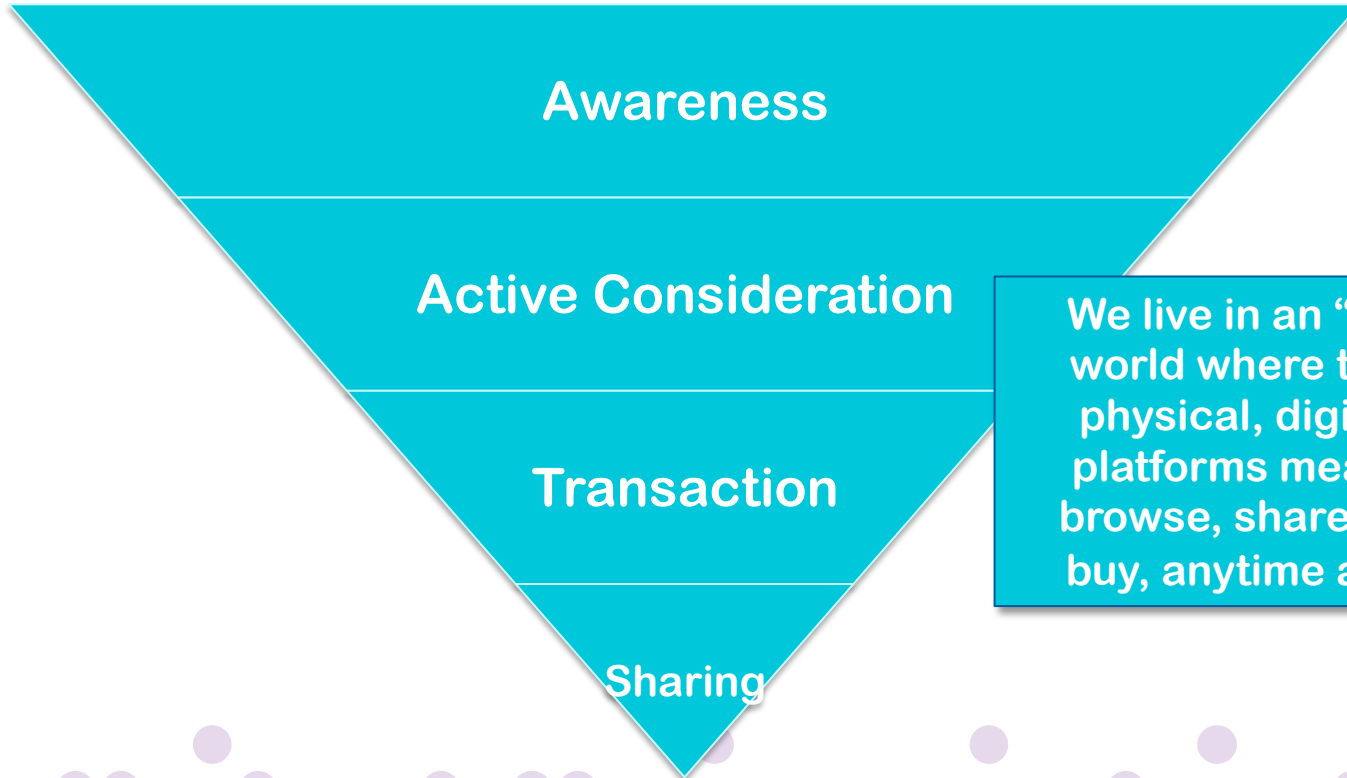


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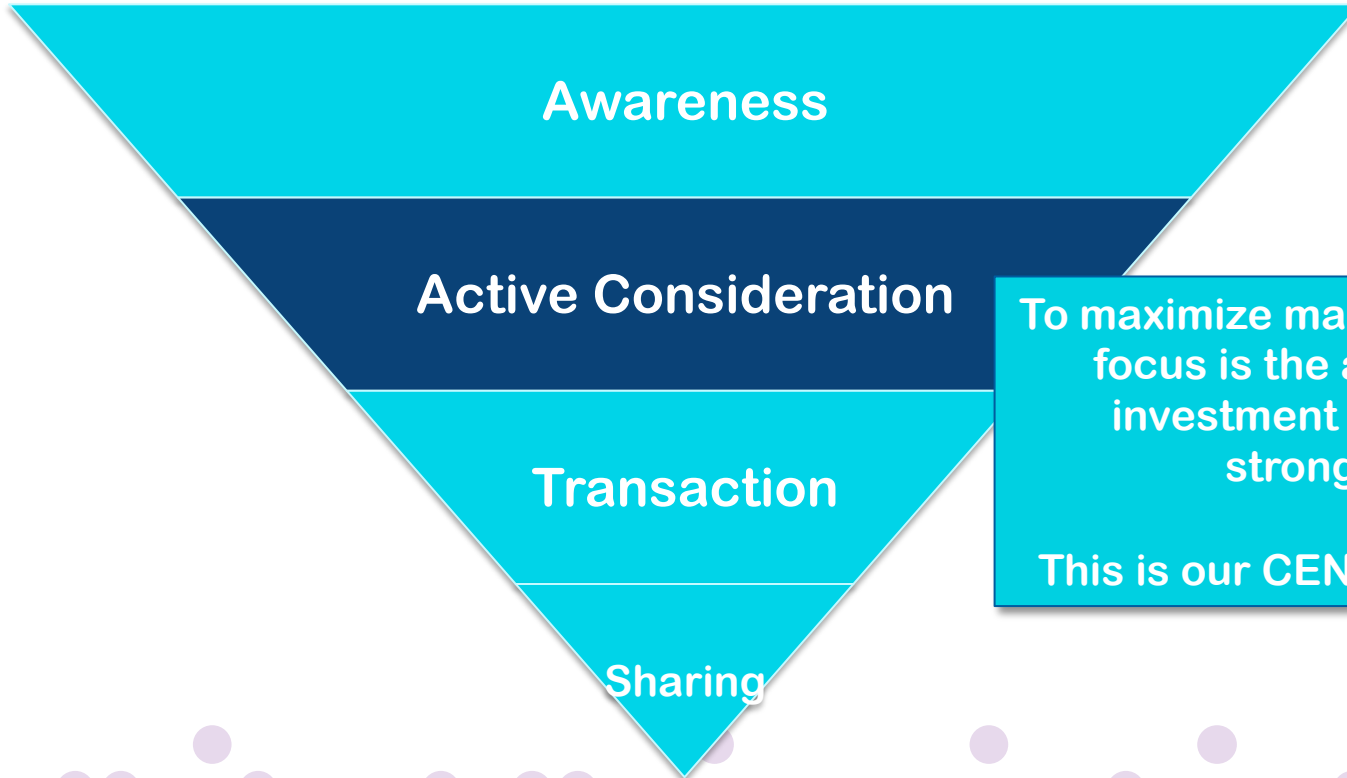
FY16 BRIDGE CAMPAIGN

Purchase Decision Journey



We live in an “omnichannel” world where the merging of physical, digital and social platforms mean people can browse, share, compare and buy, anytime and anywhere.

Purchase Decision Journey



To maximize marketing efforts, the focus is the area of optimal investment to achieve the strongest ROI.

This is our **CENTER OF GRAVITY**

Targeting Behavior: Trip Personas

To bring the 2016 creative campaign to life, we looked at the **individual nuances** of each of the 14 priority markets. For instance, how a Chinese traveler experiences excitement will be very different than a Brazilian traveler.

2016 Creative Strategy

Promote proximity and **interconnectedness of USA-only experiences** to demonstrate travel value, create a sense of urgency and continue to spark imagination and wonder.



Trip Persona

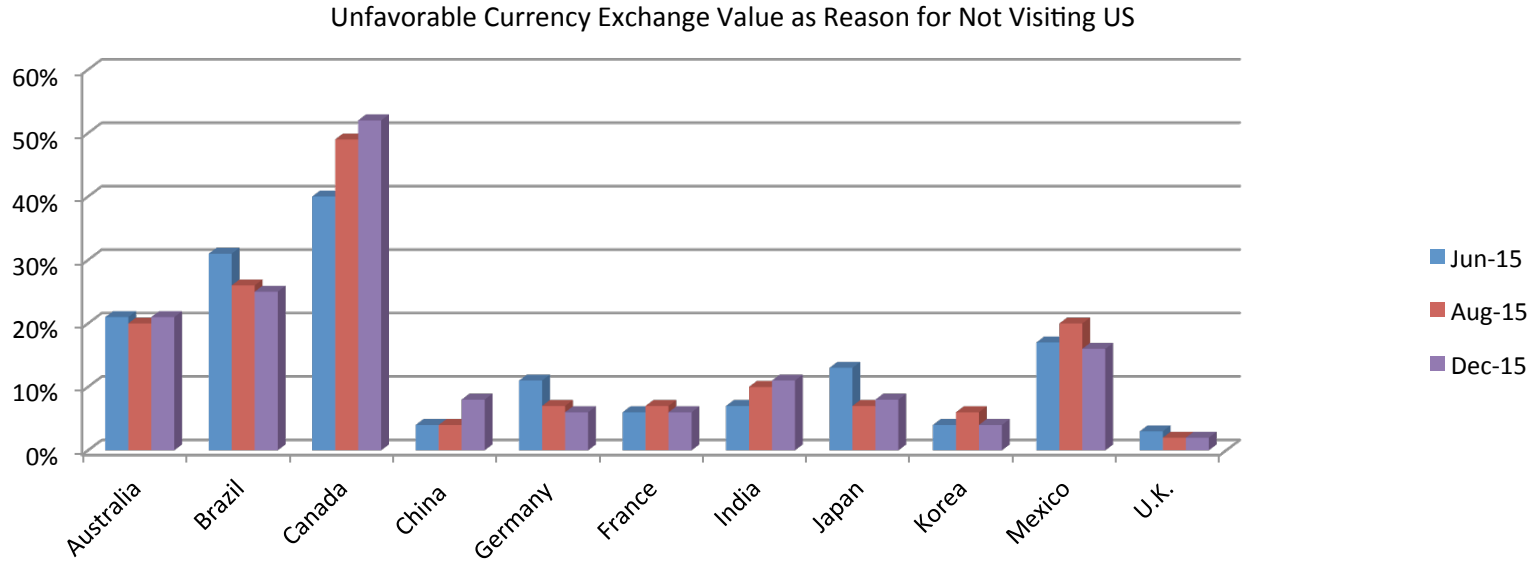
Use persona pairs to **tantalize travelers with unexpected destination juxtapositions** as a way to bring the campaign to life with maximum market relevancy

Proximity Is the Equalizer

The perceived cost of one trip with multiple experiences holds more value than many trips with a singular focus.



Strong U.S. Dollar Impacts International Visitation and Spend to the USA



Source: Brand USA Tracking Study

Base: Travelers who are not likely to visit the US in the next 12 months

Perceived Barriers

1 America is too familiar

“The US did such a good job of turning Brazilians into Americans that it’s not really different” — Brazil

“The USA is not so exotic anymore because we have adopted a lot of American stuff” — Germany

“You’ve seen it all in the movies, easy access through the Internet” — Mexico



Perceived Barriers

2

There are newer, cooler places

“Scale and bigness are owned now by Australia. If you want new and different and undiscovered you go to Southeast Asia” — UK

“Other destinations are now more top of mind, like Korea, China, Taiwan” — Japan

“There are a lot of new destinations in the [meetings and conventions] game now” — Publisher of MICE trade magazines



Perceived Barriers

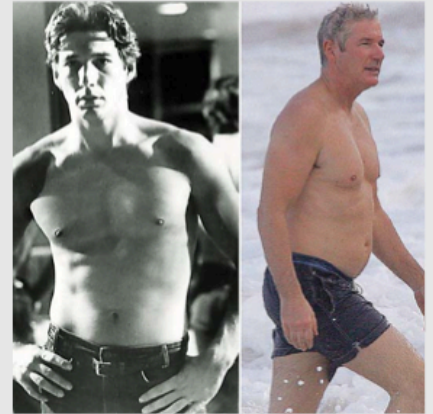
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America is now middle-aged

“America is now the ‘old’ new world...it’s the middle aged world...it used to be the new world, not anymore” — Spain

“The slightly shabby new world” — UK

“For Asians, America doesn’t reflect as positively on them as Europe does, in terms of the aspirational thing” — China



Perceived Barriers

4

America is unwelcoming

“Everywhere else in the world we feel welcome, but not in the US” — Brazil

“In other countries it’s called immigration...in America it’s called Homeland Security...bear in mind the semiotics of that” — UK

“The biggest surprise was the airport. At customs, they were very rude.” — Mexico



Perceived Barriers

5

America is artificial

“America is very man made, not original” — India

“The US is just about shopping” — Brazil

“They feel like the US is a big farce, while France and Europe are considered as authentic” — France



Perceived Barriers

6

America is overwhelming

“The size and vastness of the USA can be somewhat overwhelming for new visitors and package tours help make this much more manageable” — India

“At first, you choose the obvious destinations – Disney, New York or Florida, because you’ve heard from other Brazilians and you know those are safe bets for us” — Brazil

“The only problem is you don’t know where to start” — China



Perceived Barriers

7

America is brash and arrogant

In TripAdvisor, Americans are rated as the loudest and most obnoxious tourists

“Chinese still feel that America is the leader and sets the global standards, but they also see America as arrogant, not generous, petty, confrontational and getting in fight with everyone. And they see America as dangerous with their free gun rights” — Richard Hsu, Director, TED China

“Arrogant, aggressive and biased against Islamic values; most thought that US culture was a corrupting influence on their societies.” — Charles Skuba





2016 BRIDGE STRATEGY

**PROXIMITY IS THE HEART OF THE EXPANDED
POSITIONING & VALUE PROPOSITION**

2016 BRIDGE STRATEGY

A wide-angle photograph of the Denver skyline, featuring numerous skyscrapers and high-rise buildings. In the background, the snow-capped peaks of the Rocky Mountains are visible under a clear blue sky. The image is slightly hazy, giving it a soft, atmospheric feel.

CAPITALIZE ON PREVIOUS THEMES

2016 BRIDGE STRATEGY

A wide-angle photograph of the Denver skyline, featuring numerous skyscrapers and high-rise buildings. In the background, a range of snow-capped mountains is visible under a clear blue sky. The image is slightly hazy, giving it a soft, atmospheric feel.

UTILIZE AND EXPAND UPON EXISTING ASSETS

2016 BRIDGE STRATEGY

A wide-angle photograph of the Denver skyline, featuring numerous skyscrapers and high-rise buildings. In the background, a range of snow-capped mountains is visible under a clear blue sky. The image is slightly hazy, giving it a soft, atmospheric feel.

**BUILD UPON ICONIC DESTINATIONS WHILE INTRODUCING NEW/
UNDISCOVERED EXPERIENCES**

2016 BRIDGE STRATEGY



**PUT THE VASTNESS AND DIVERSITY OF THE
U.S. TRAVEL EXPERIENCE IN CONTEXT**

2016 BRIDGE STRATEGY

A wide-angle photograph of the Denver skyline, featuring numerous skyscrapers and high-rise buildings. In the background, the snow-capped peaks of the Rocky Mountains are visible under a clear blue sky. The image is slightly hazy, giving it a soft, atmospheric feel.

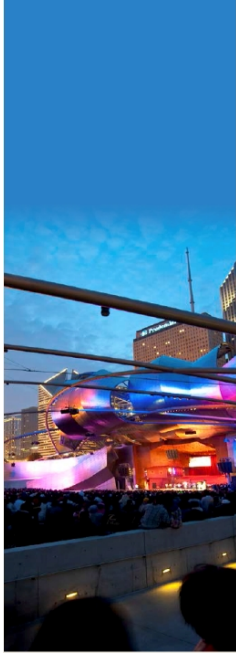
**SERVING UP EXPERIENCES/INTERESTS THAT MATCH
TRIP PERSONA PROFILES**

ALL WITHIN YOUR REACH



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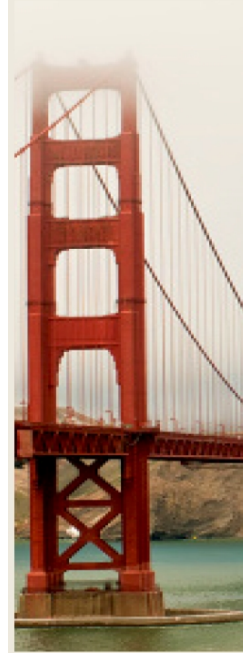
SURPRISING JUXTAPOSITIONS



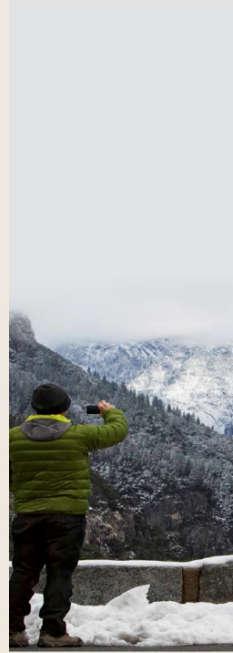
Chicago



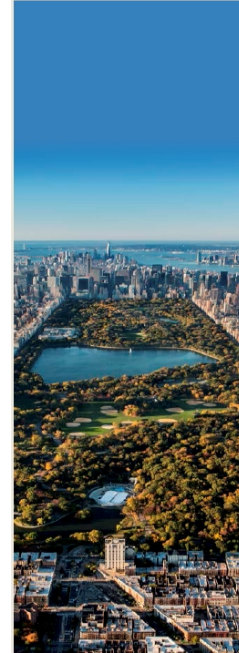
Grand Haven



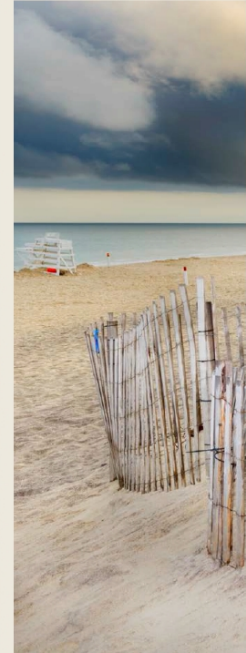
San Francisco



Yosemite



New York City



The Hamptons

Print Ad



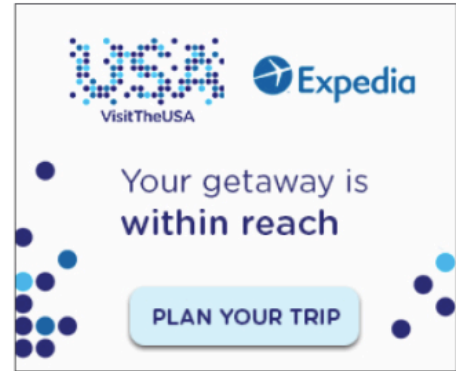
Print Ad



Print Ad



Retargeting



Digital Banner Ads: Prospecting & Retargeting

- 14 Consumer Markets
- 8 Pairings per market (22 Hub Destinations + 38 Proximity Locations)
- Dynamically optimized by performance



USA

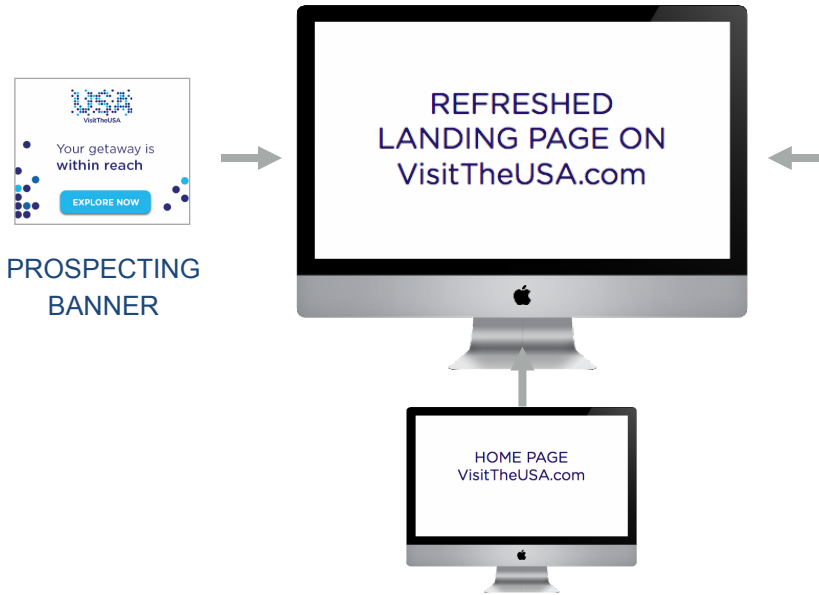
VisitTheUSA.com

Brand USA

Destination Hubs

Refreshed Landing Pages

Optimize engagement on Brand USA landing pages to help travelers “connect the dots”



Use “proximity” as a framing device for organizing and curating content

- Provide easy access to compelling, destination-based content from a variety of sources
 - Nearby experiences & POIs
 - Content Videos
 - Map
 - Social Media Feed
- Modules can be turned on and off, and optimized based on performance

Home Page: VisitTheUSA.com

Visitors will be driven to the homepage from print and OOH advertising, or when they search “Visit The USA” online.



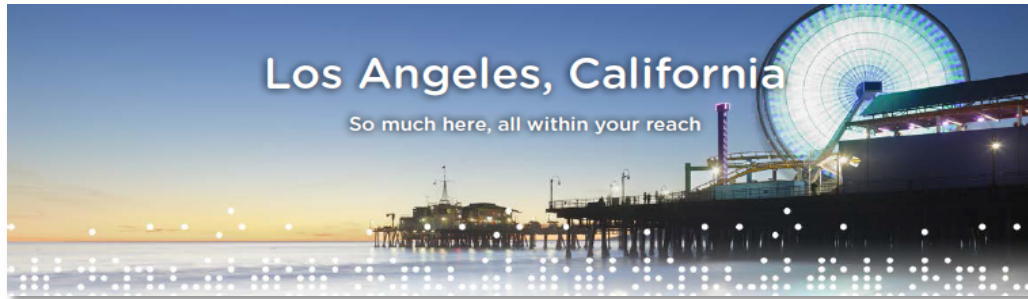
Homepage will feature a prominent callout to reinforce the campaign, and prompt viewers to click-through.



Proximity pairings are matched to the market



22 New Destination Hubs



The hubs prompt viewers to select their area of interest, and see all the experiences within reach.

These pages can be reached via link from the home page, or via retargeting from digital media.

1. Anchorage
2. Atlanta
3. Austin
4. Boston
5. Charleston
6. Chicago
7. Denver
8. Honolulu
9. Las Vegas
10. Los Angeles
11. Miami
12. Minneapolis
13. Nashville
14. New Orleans
15. New York City
16. Orlando
17. Portland, OR
18. Salt Lake City
19. San Diego
20. San Francisco
21. Seattle
22. Washington D.C

38 Proximity Locations

1. Tampa/St. Pete
2. Santa Fe
3. Santa Monica
4. Memphis
5. Newport
6. Palm Springs
7. Hot Springs
8. Santa Barbara
9. Louisiana Bayou
10. Smoky Mountains
11. Hilton Head Island
12. Savannah
13. North Shore
14. Kona
15. Multnomah Falls
16. Kauai
17. Route 66
18. Volcano
19. Vail
20. Mount Rushmore
21. Napa
22. Everglades
23. Key West
24. San Juan Islands
25. Bryce Canyon
26. Venice Beach
27. Yosemite
28. Hamptons
29. Redwoods
30. Cape Cod
31. Yellowstone
32. Denali
33. Joshua Tree
34. Grand Haven
35. Niagara Falls
36. Shenandoah Valley
37. St. Louis
38. Grand Canyon

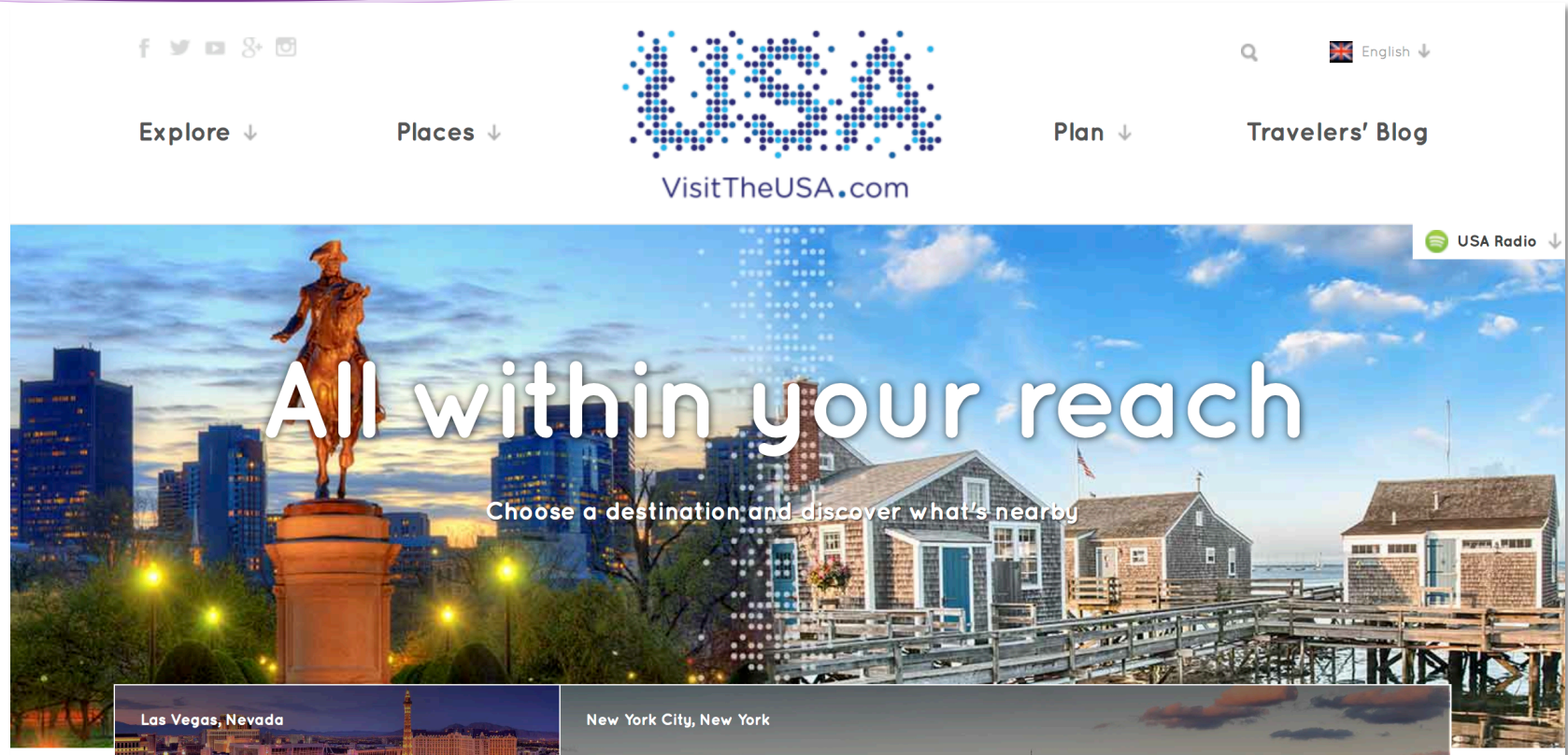


Chicago & Route 66



Honolulu & Volcano

Destination Hub: UK Example



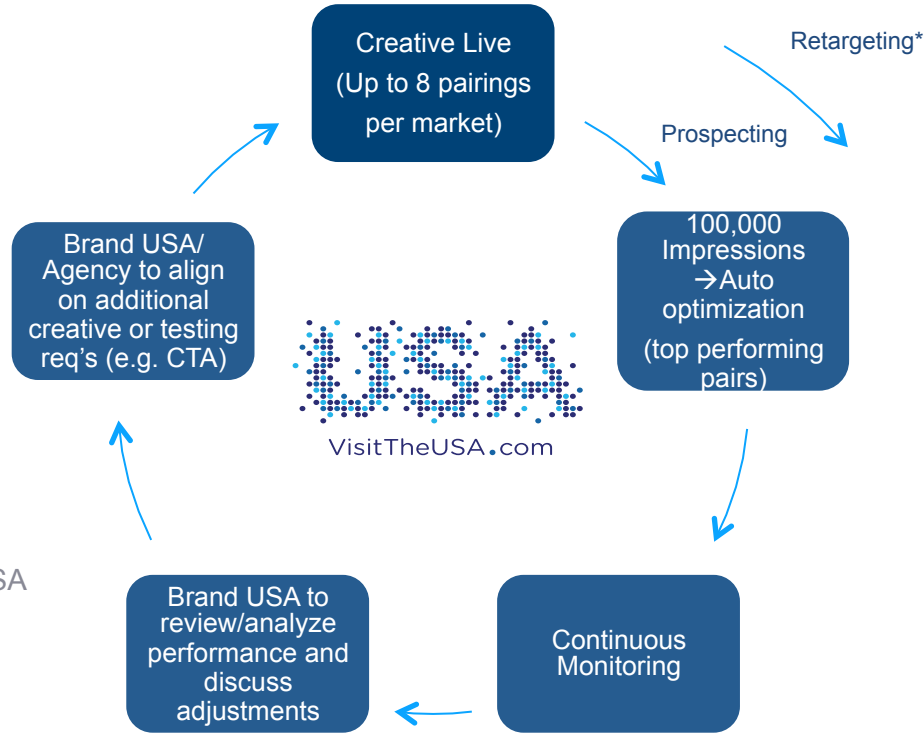


Key Performance Indicators

Key Performance Indicators



Performance Optimization/Monitoring



* Retargeting: users who visit Brand USA site will be auto-served media with pairings/destinations relevant to prior visits.

FY2017 Business Planning Process



Anne Madison

**Chief Strategy & Communications
Officer**

Brand USA



FY2017 Business Planning Process

USA

VisitTheUSA.com

Brand USA

FY2017 Planning Cycle

**CMO
Roundtable**
Feb. 9

**Present
Strategy to
the Board**
March 22 &
March 31

**Marketing
Roundtables**
April/May

**FY15 Annual
Report to
Commerce**
May 1

**FY2017
Objectives to
Commerce**
August 1

**Marketing
Roundtables**
September

**Present
Business
Plan to the
Board**
September

**Publish
FY2017
Business
Plan**
October 1



Statement of Purpose: Foundational Elements

Maximize and optimize ROI of Brand USA resources
by deploying the right messages, through the right channels, in the right markets, at the right times and at the right investment levels

Add and Create Value
by pioneering cooperative marketing platforms and programs that grow and leverage the USA brand in ways our Partners would be challenged or unable to do on their own



Promote the entirety of the USA
with innovative marketing that supports all 50 states, the District of Columbia and five territories to, through and beyond the gateways

Inspire, inform welcome and thank travelers
while accurately communicating vital and compelling information about visa & entry policies

Build and maintain trusted relationships with stakeholders worldwide through inclusive, proactive and transparent outreach with a commitment to compliance and integrity through words, actions and results



VisitTheUSA.com

Brand USA

Discussion



**Thank you for attending
the March Marketing Committee Meeting**