



# Marketing Committee Meeting

June 2, 2016





# Opening Remarks

USA  
VisitTheUSA.com

Brand USA



## Item 1: Approval of Minutes\*

USA

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

Brand USA



## Item 2: CEO Report



# Brand USA Annual Partner Study

- Objective – measure partner satisfaction across important facets of our operations including:
  - Clarity in communications
  - Responsiveness
  - Marketing effectiveness
- Sample
  - 52 surveys completed
  - Representative sample of partners across verticals and contribution levels
- Results Highlights
  - 92% agree that partnering with Brand USA adds value to their organization
  - 94% intend to partner with Brand USA again in the future



# Key Takeaways

- More Planning Lead Time
- Communication Between/Among International Offices
- Pro-Active Communications Promoting “Opportunities”
- Partner Portal Updates
- Reporting Campaign Results

# Partner Programs Roundtable



# Partner Programs Roundtable

- Bernadette Carter – NYC & Company
- Julie Chase – Austin CVB
- Dolly Chewning – South Carolina Department of Parks, Recreation & Tourism
- Nate Huff – Miles
- Pamela Johnson – Lee County CVB (Ft. Meyers & Beaches of Sanibel)
- Sue Presby – Cog Railway
- Matt Stiker – CityPASS
- David Burgess - Miles



# Global Market Development Roundtable



# Global Market Development Roundtable

- Theresa Belpulsi – Destination DC
- Jennifer Diaz – Greater Miami Convention & Visitors Authority
- Michael Goldsmith – Las Vegas Convention & Visitors Authority
- Jan Kemmerling – Illinois Office of Tourism
- Karen Kurth – Disney Parks & Resorts
- Kim Priez – New Orleans CVB
- Brian Said – Philadelphia CVB
- James Scoon – Wyoming Office of Tourism
- Kathy Smits – Los Angeles Tourism & Convention Board





## Item 3: CMO Report

USA  
VisitTheUSA.com

Brand USA



## 2016 PROXIMITY CAMPAIGN

# Early Assessment

So. How are we doing?

# FY16 Media Approach

Awareness and engagement are key measures for 2016.

## First flight (Feb '16)

- Australia
- Germany
- India
- UK
- Brazil

## Second Flight (May '16)

- Canada
- China
- Japan
- Mexico
- South Korea

Our goal is to deliver enough website traffic  
to show engaged user growth.



# FY16 Performance: First Flight

- First Flight
  - Optimize toward the right target (+62% CTR)
  - Optimize toward the right audience at maximum efficiency (-19% CPC)
  - Maximize efficient content consumption through video (- 34% CPCV)
  - Optimize off website pages visited (-20% CPNV)

Through May 12, we are ahead +4% YOY on web traffic; -6% on bounce

FY15	FY16
2,254,874	2,341,848



# Proximity: Online Video

## Maximize efficient content consumption through video

- Objective
  - Shift to OLV to deliver a device-neutral strategy
  - Drive awareness and completed video views by use of iconic imagery
- Key Performance Indicators
  - Completion rate: +8% versus YAG
  - Cost Per Completed View: 34% decrease in CPCV indicates maximized content consumption



### Implications

Online video may take up 80% of all consumer internet traffic by 2019.

It's important for us to understand the elements of successful narratives.

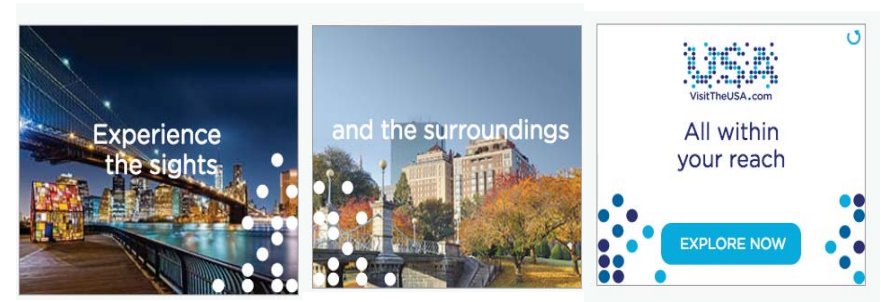
Note: Results reflect optimization between Week 3 & Week 7

VisitTheUSA.com

# Proximity: Digital Display

## Optimizing Toward The Right Target

- Objective
  - Drive engagement with targeted audiences
  - Increase in CTR illustrates message and audience alignment
- Key Performance Indicators
  - CTR: +62% improvement



### Implications

**Brand USA Average CTR: 1.7%**  
**Industry Benchmark: 0.2%-0.4%**

Note: Results reflect optimization between Week 3 & Week 7

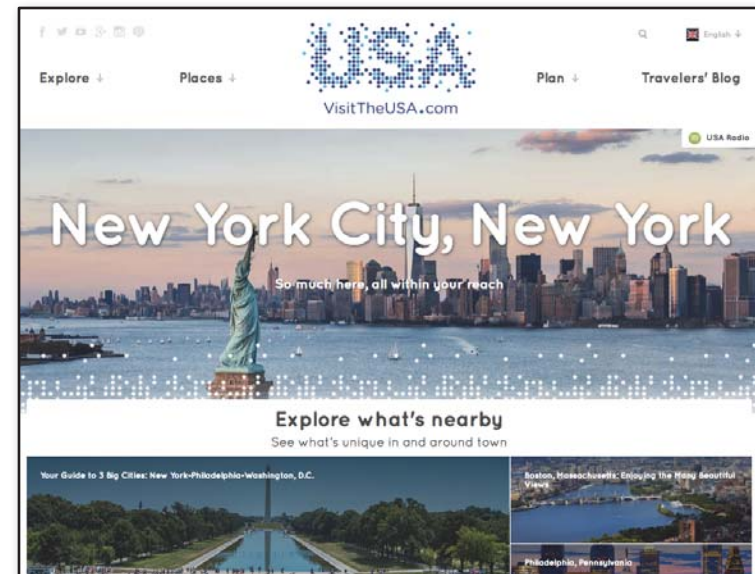


# Proximity: Website

## Activate consumers with inspiring images & messaging

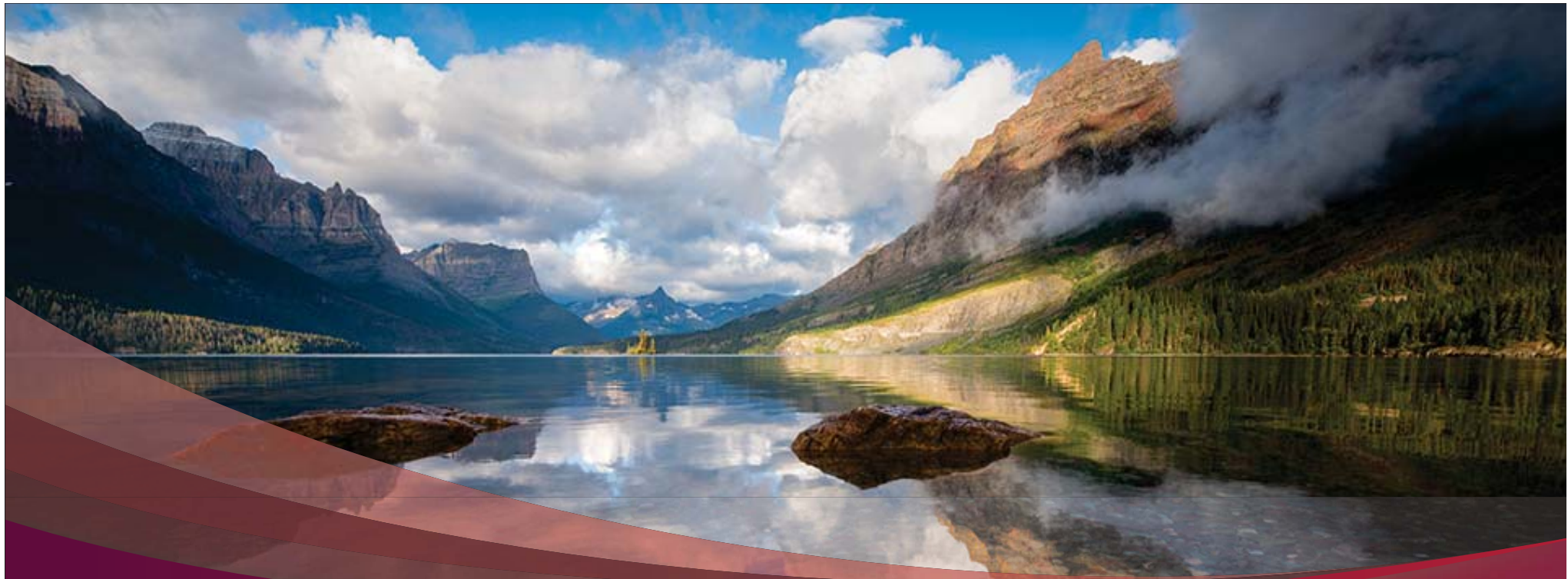
- Objective
  - Decrease in Cost Per Net Visit illustrates engagement with proximity content
- Key Performance Indicators:
  - Time on page for new landing pages: +24% improvement
  - Cost per net visit\* (CPNV): -20% improvement

\*Cost of a visit less bounce (engaged visitor)



Note: Results reflect optimization between Week 3 & Week 7





## NEW FALL CAMPAIGN UPDATE

**The diversity of the USA is exciting and uniquely  
ours to own in a way that is magnetic and inviting**

And, uniquely “yours” to discover genuine and authentic opportunities that truly speak to who you are

**And there's an American story for everyone, just waiting to be created...**

**The collection of these experiences become our own unique story that we in turn share with friends and family**

# Social-First Objective

**Now is always the time to experience a new chapter in your USA story.**

Social first will be an ongoing effort to **put momentum behind inherent sharing behaviors and constantly budding travel plans** in a relevant and impactful way.

- We should emphasize the consumer's potential story, so that our content is feeding their personal brand, not merely talking about our own.
- There should be a sense of time and place, giving messaging a dynamism that urges visitors to take action **now**.



# Expanding on Social First

Brand USA's social-first principle is rooted in today's cultural reality, and will guide how operate holistically, from identifying audiences and media platforms, to developing messaging in an ongoing fashion.

## TRAVELERS ARE INSPIRED BY AND INFLUENCED THROUGH SOCIAL

52

% USERS CONFIRMED THAT FRIEND'S PHOTOS INSPIRED THEIR OWN TRAVEL PLANS

% PEOPLE CHANGED TRAVEL PLANS AFTER USING SOCIAL MEDIA AS A RESEARCH TOOL

## DISCOVERY FUELS CREDIBILITY TO VISITOR STORIES (and can be shared in real time)



# Creative Expression Research

Our strategy has evolved into unique creative expressions that are currently in global research including

3

EXPRESSIONS

11

COUNTRIES

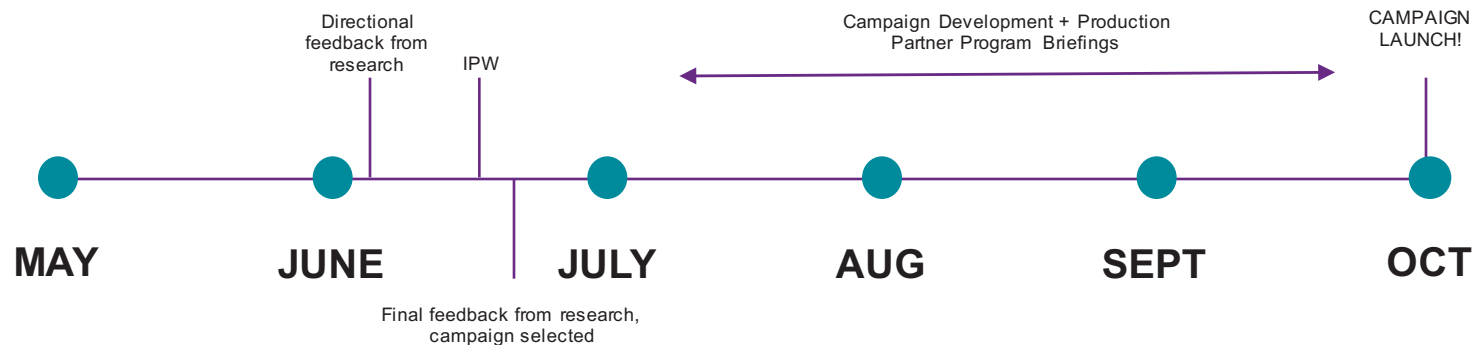
8

LANGUAGES



# Research, Development, Launch

The research will give us an idea of the campaign with best potential success and frame a clear picture of where Brand USA will be headed in 2017 and beyond.

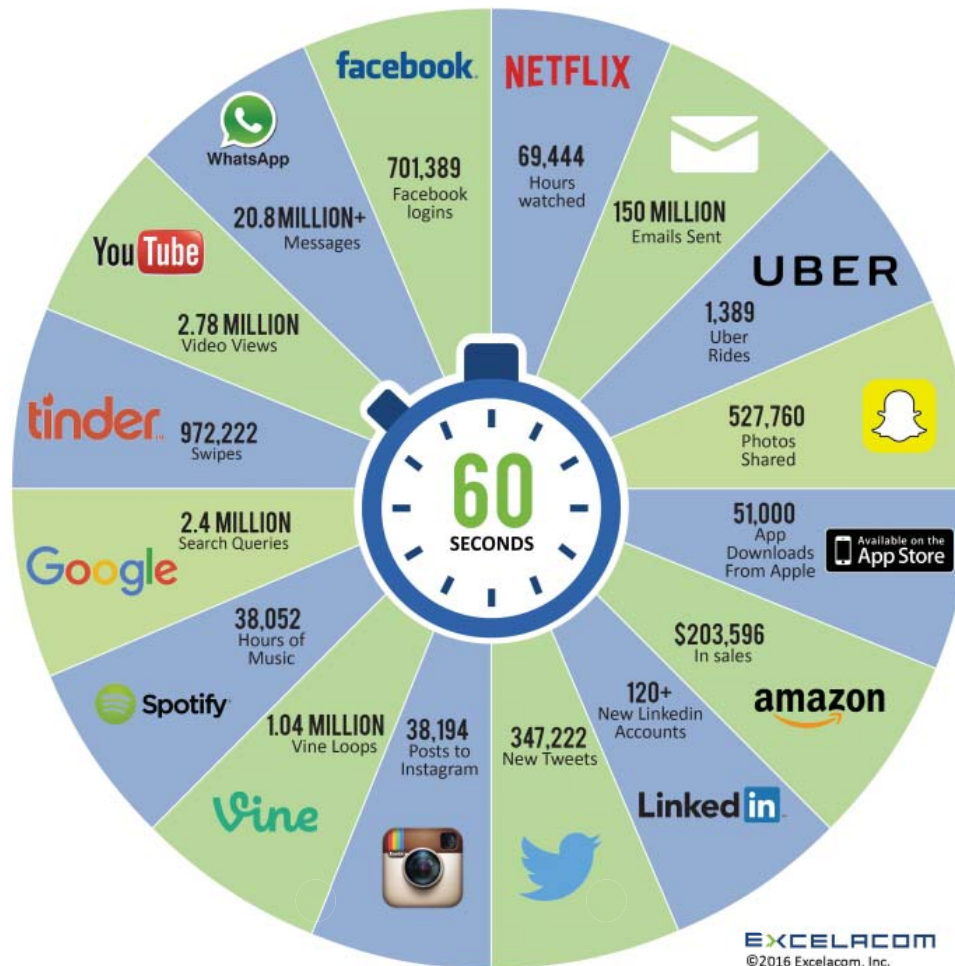




# NEW WEBSITE DESIGN AND FUNCTIONALITY

The background of the slide features a night landscape with large, light-colored rocks in the foreground and middle ground. Several dark evergreen trees are scattered across the scene. The sky is a deep blue, filled with numerous stars and the prominent, glowing band of the Milky Way galaxy stretching diagonally across the upper half of the image. The lower portion of the slide is a solid dark blue, containing the title text and a decorative pattern of small, light blue circles at the very bottom.

# 2016 What happens in an INTERNET MINUTE?



# The User Journey

- Is a complex, non-linear process with lots of players.
- Visitors are not in our funnel – We are in their journey.
- Hardest thing to do is change behavior, so we have to play in the space where they are already exploring.



# Traveler's Digital Mindsets



## SNACKING

"I look for potential inspiration wherever it is"

Clicking

Scrolling

Watching



## DISCOVERING

"Looking for inspiration, I am wandering on the web"

Scrolling

Reading

Watching



## CONSIDERING

"I'm considering to go to the USA but still comparing it to other destinations"

Bookmarking

Comparing

Reading



## ENGAGING

"I want to go to the USA but want more info to chose the destinations"

Interacting

Testing

Watching



## PLANNING

"I know where to go but I want to organize my trip"

Searching

Reading

Bookmarking

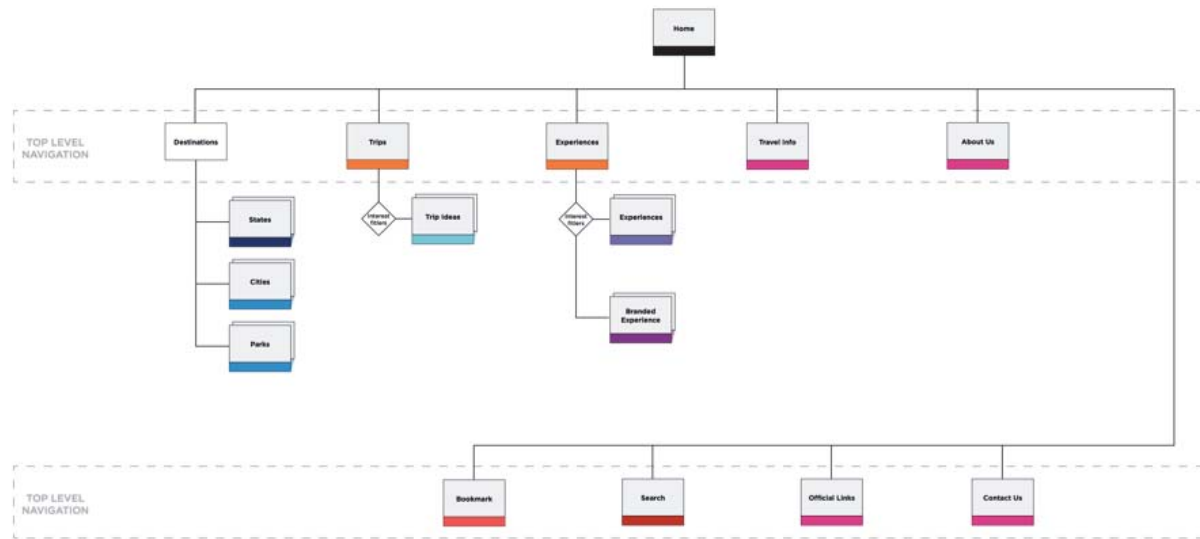


VisitTheUSA.com



WIREFRAMES

## Sitemap



## Sitemap

### Footer Pages



### Social Links

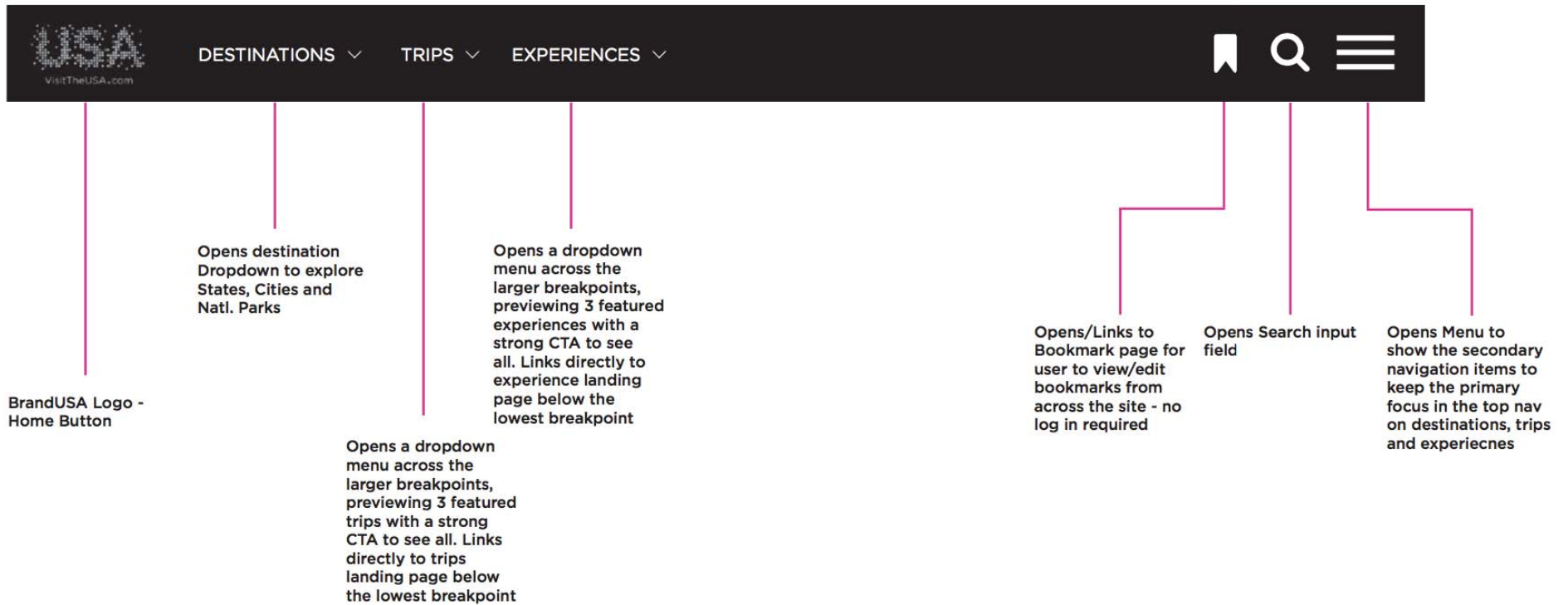


### External Links



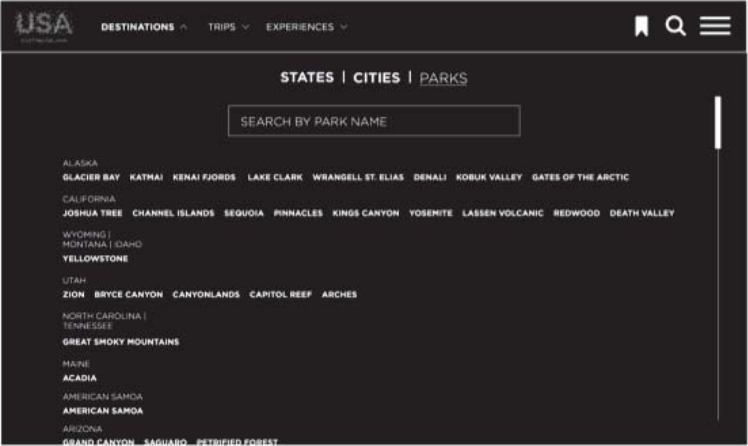
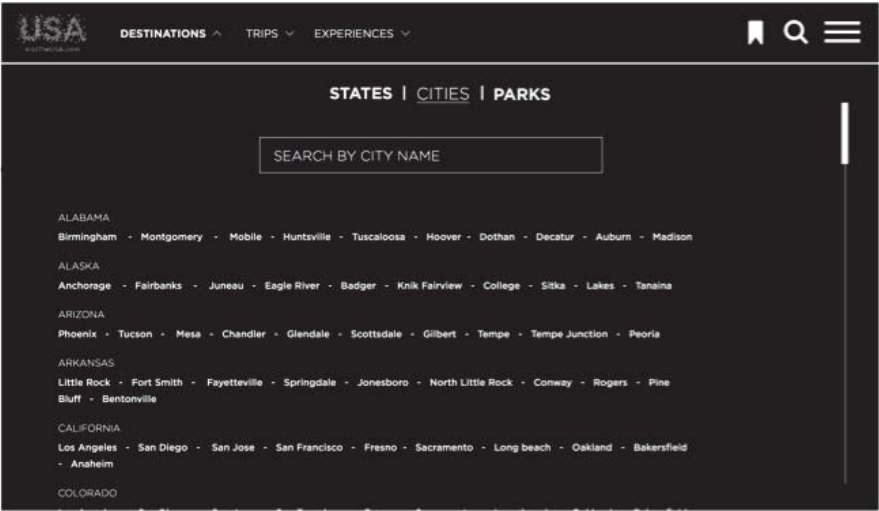
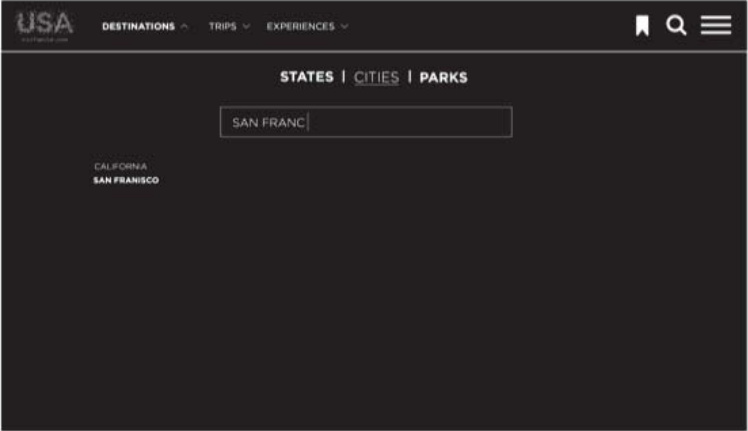
### Templates





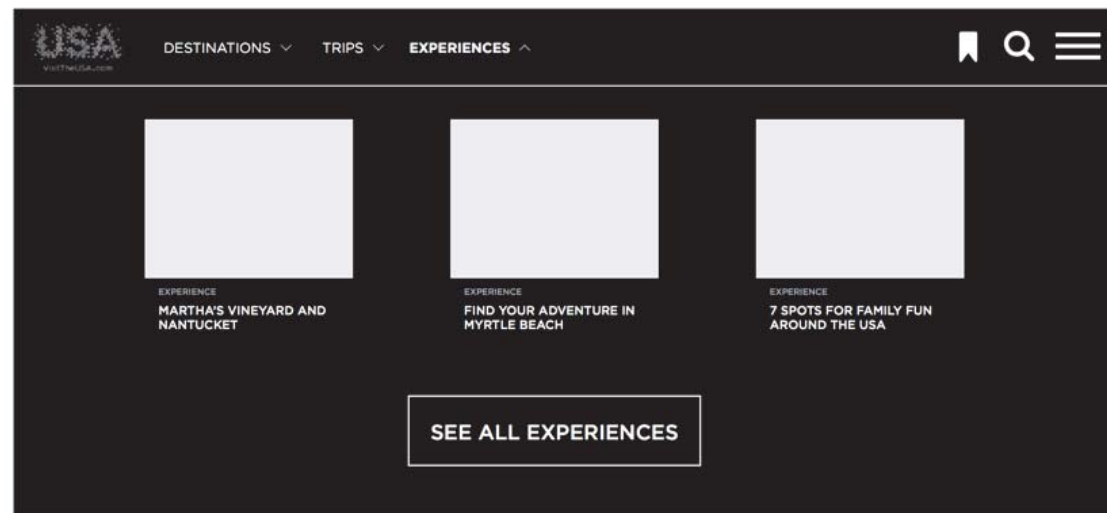
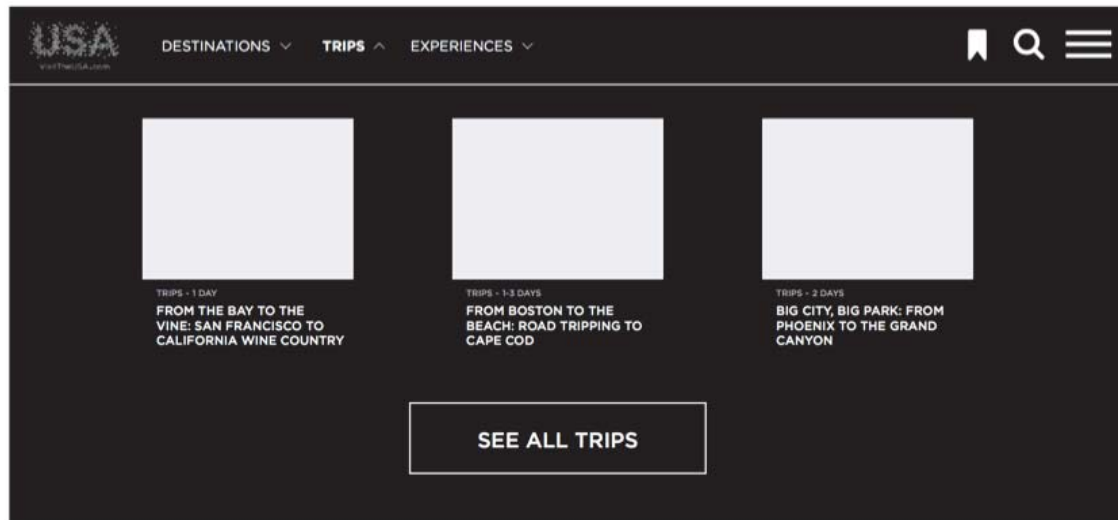
## Navigation - Desktop

Navigation - Destinations - 1280px



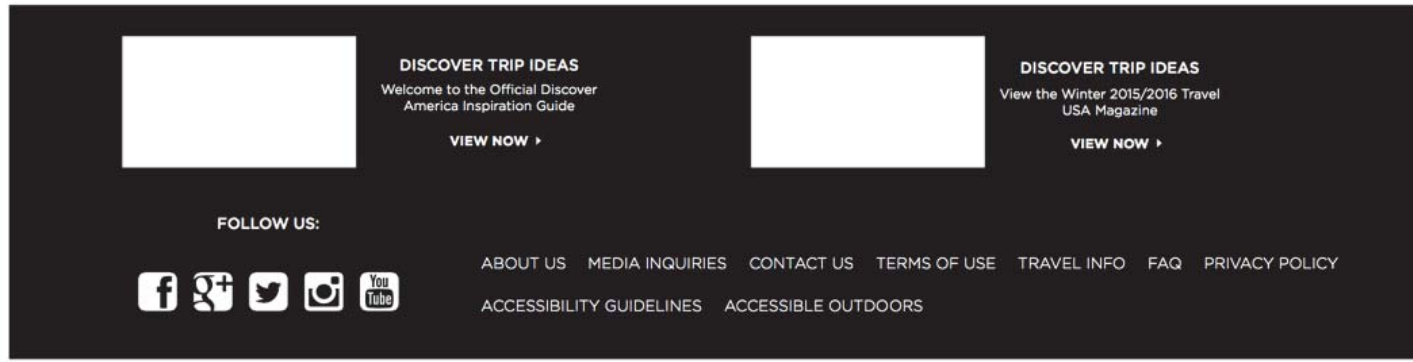
Navigation  
Desktop:

States  
Cities  
Search  
Cities  
Parks

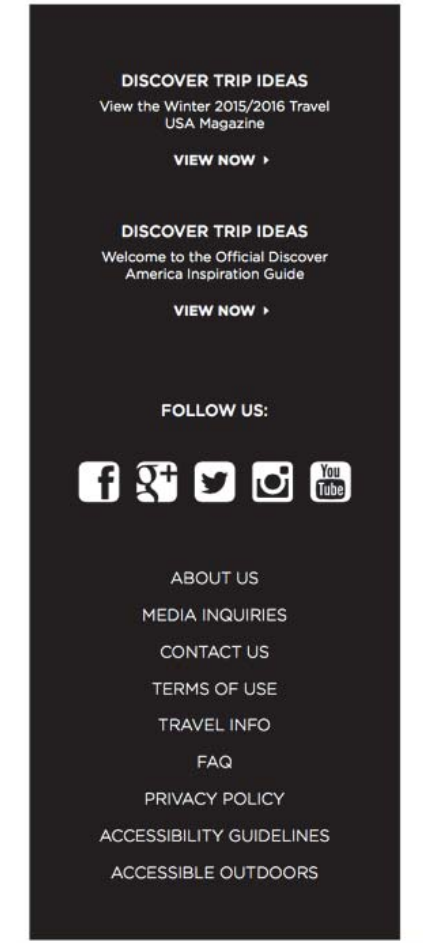


Navigation  
Desktop:

Trips  
Experiences

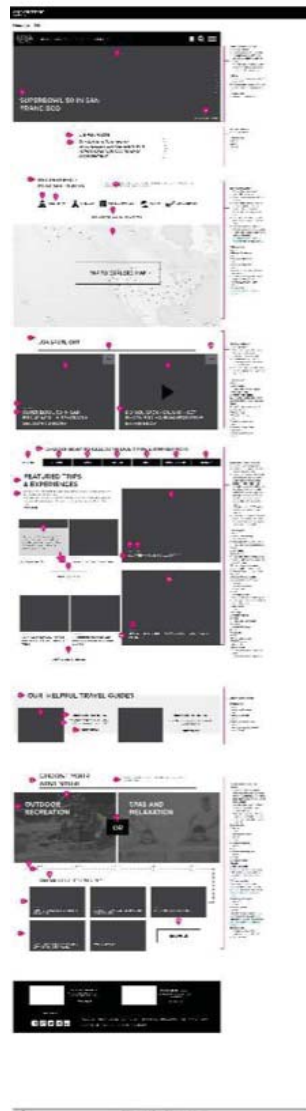


Footer -  
Desktop



Footer -  
Mobile

Home page





1 GET INSPIRED -  
MUST SEE PLACES

2 NOT SURE WHERE TO GO? EXPLORE OUR MAP OR SOME OF OUR CURATED  
SUGGESTIONS TO GET YOU STARTED.



ICONIC SIGHTS



OUTDOORS



EVENTS & FESTIVALS



BEACHES

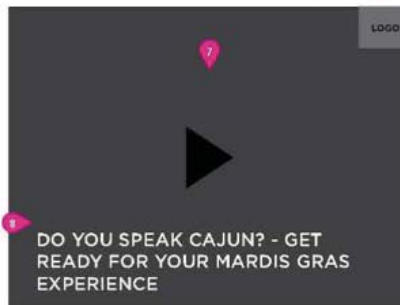


ARTS & CULTURE

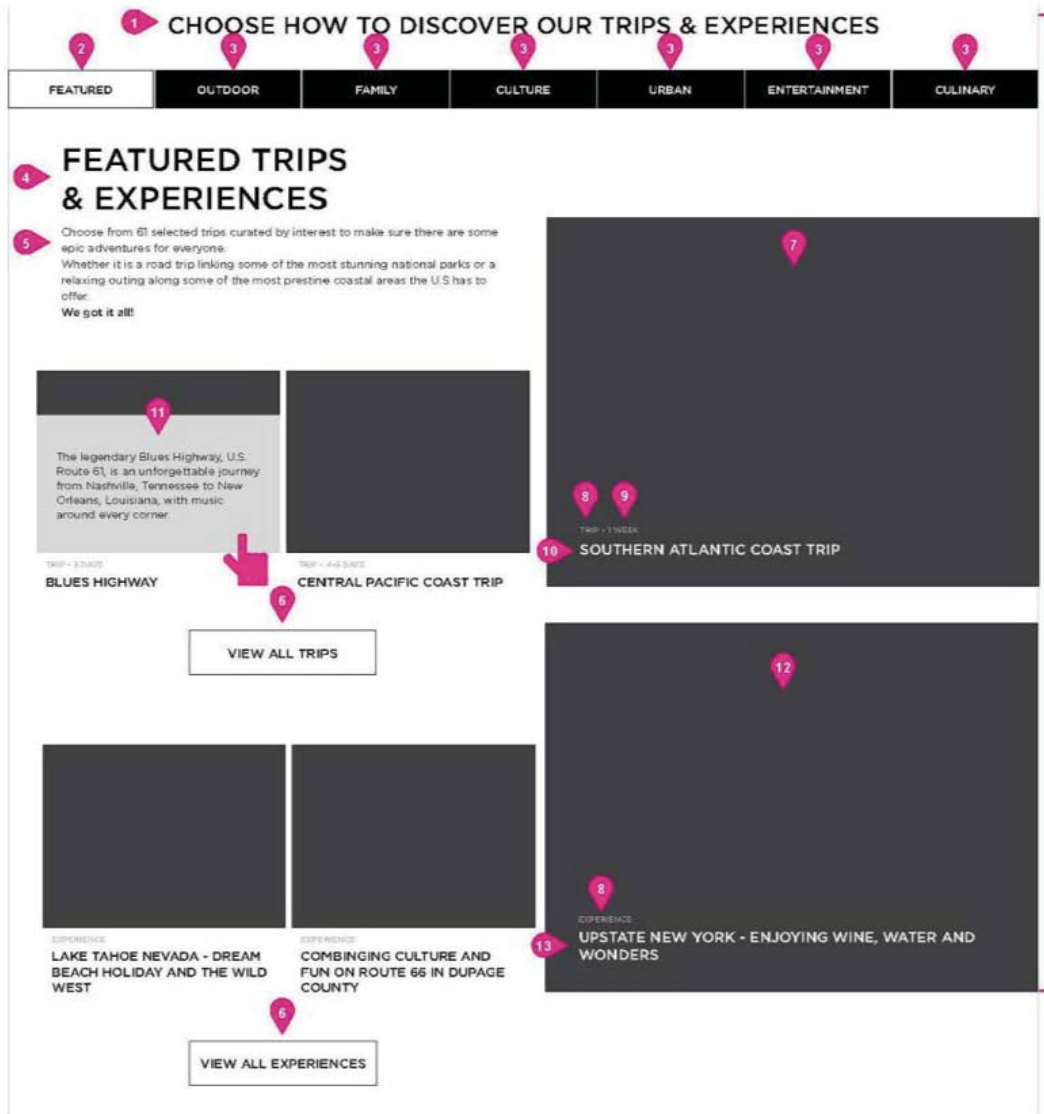
EXPLORE THE MAP OR USE A FILTER!



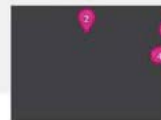
1 USA SPOTLIGHT







## 1 OUR HELPFUL TRAVEL GUIDES



### DISCOVER TRIP IDEAS

Welcome to the Official Discover America Inspiration Guide

VIEW NOW >



### DISCOVER TRIP IDEAS

View the Winter 2016/2016 Travel USA Magazine

VIEW NOW >

## 2 CHOOSE YOUR ADVENTURE

WE HAVE SOMETHING FOR EVERYONE. TELL ME WHAT YOU'RE INTO!



### OUTDOOR RECREATION



### SPAS AND RELAXATION

OR

YOU SHOULD CHECK THIS OUT:



MEMPHIS, TENNESSEE FROM BBQ TO BEALE STREET



BOSTON, MASSACHUSETTS DINING AND HIGH-LIFE SCENE



SAN FRANCISCO, CALIFORNIA



LAKE CHARLESTON AND THE SOUTH-WEST LOUISIANA BOUDIN TRAIL



STEPHANIE IZARD

SHUFFLE



### DISCOVER TRIP IDEAS

Welcome to the Official Discover America Inspiration Guide

VIEW NOW >



### DISCOVER TRIP IDEAS

View the Winter 2016/2016 Travel USA Magazine

VIEW NOW >

FOLLOW US:



ABOUT US | MEDIA INQUIRIES | CONTACT US | TERMS OF USE | TRAVEL INFO | FAQ | PRIVACY POLICY



## 2017 PARTNER PROGRAMS AND CO-OP PREVIEW

# 2017 Partner Strategy

- Inspire potential visitors about the diversity of experiences in the USA
- Help them to understand how to get from here to there
- Create a message and tell the story the way a visitor wants to hear it
  - Proximity is created based on location or interest
  - Discovered and undiscovered
  - Location and Interest
  - Effectively sell a country as vast as the USA through Proximity strategy with our Partners – itineraries, road trips



USA  
VisitTheUSA.com



**EXPANDING CONTENT**

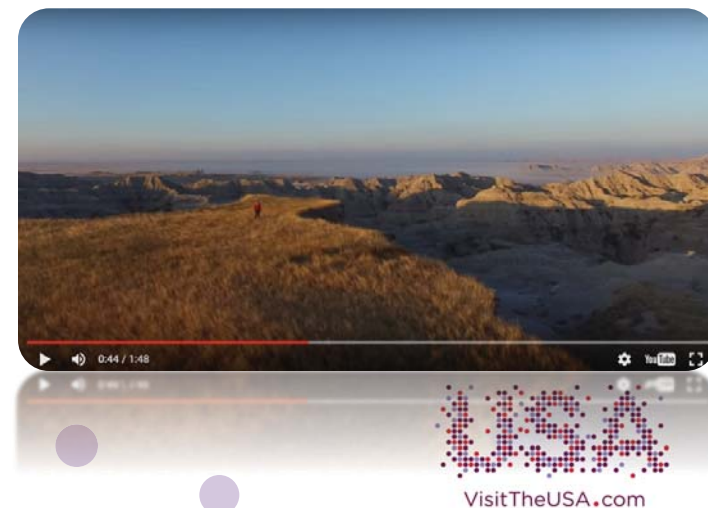
# Content Development

- ✓ More on Cities and Towns and itineraries maps and info graphics
- ✓ Culinary
- ✓ Sports (recreation)
- Theme Parks (attractions)
- Art (museums)
- Music
- Film
- Fashion
- Like a Local (Makers Movement)



# VisitTheUSA.com + Gousa.cn

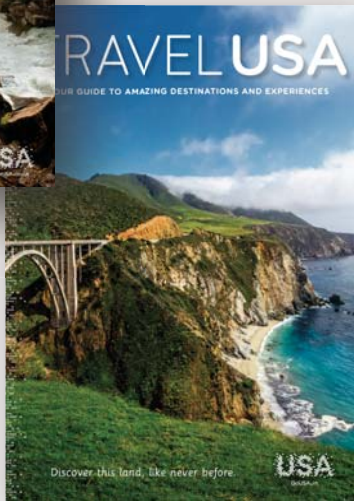
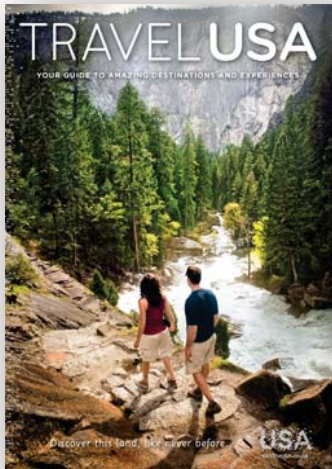
- Content Development + distribution platforms
- Rich Destination pages + dedicated audience development + activation opportunities
- Experience and attraction sections and audience development
- Regional digital strategy
- Social...Share
- Multiple Video Options
  - Destination-At-Glance Videos
  - International Storyteller (Thematic) Videos
  - Native Traveler Videos
  - Destination Videos Produced by Matador



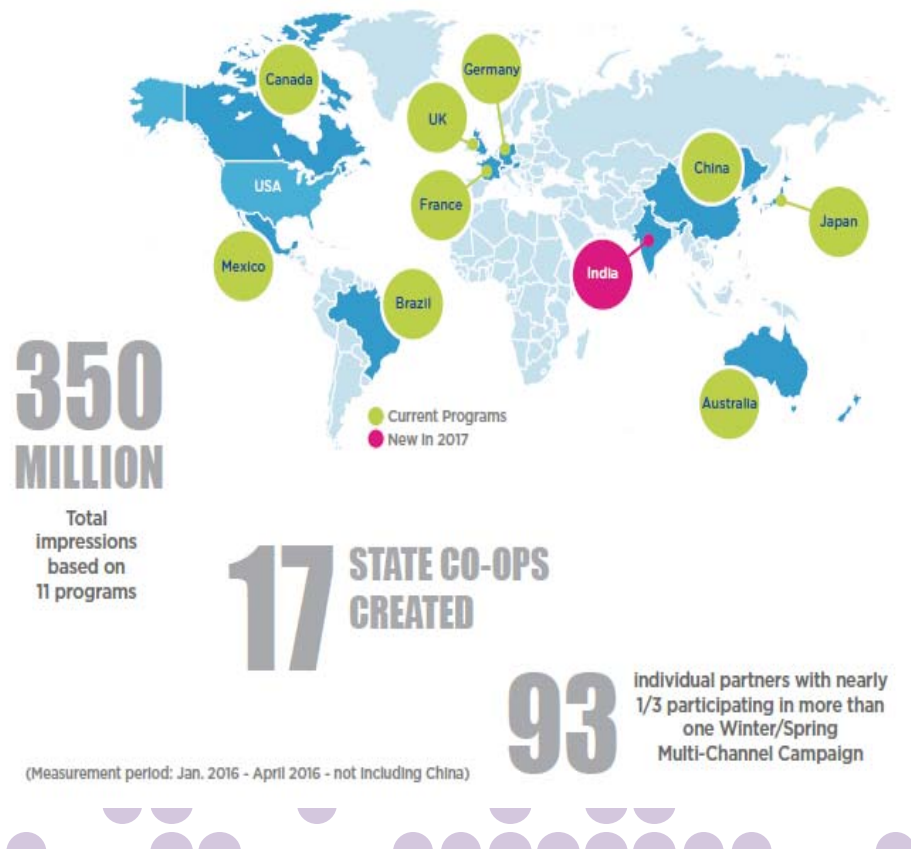


## PARTNER OPPORTUNITIES

# Evolution of Inspiration Guide

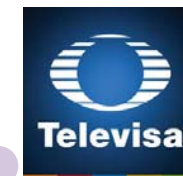


# 2017 Multi-Channel Campaigns



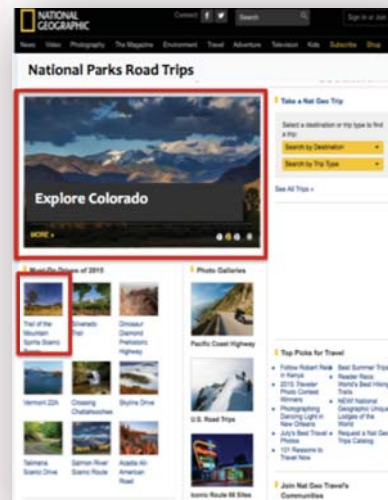
Strategic and collaborative media partnerships to amplify partner value:

- Expedia - global activation partner – enhance & increase ROI
- Sojern – data-driven, higher-funnel – engagement
- Facebook – innovative co-op using carousel unit for multiple partners – share
- Televisa (Mexico)- pilot Fall '17



# Global Consumer Programs

**ESPN**



# New Consumer Market Specific Programs

<u>BY COUNTRY</u>	<u>AIRLINES</u>	<u>INTEREST</u>	<u>TOUR OPERATOR*</u>
• Canada	Air Canada	Golf	
• Mexico	Aero Mexico	Ski	
• UK	British Airways	Golf/Ski	Thomas Cook, STA, Golfbreaks
• Germany	Air Berlin	Ski/Mountain	Thomas Cook, STA
• Australia		Ski/Mountain	STA
• China and Taiwan		Retail	

- \* Thomas Cook and STA programs are available in additional markets.



# Especially for Attractions

## Overview

- Opportunity developed for Attraction Partners – Content Development & Activation
- Platform to develop content to engage consumers on TripAdvisor & Brand USA channels (all-new VisitTheUSA sites & Multi-Channel programs)
- Booking opportunities, tracking and measurement
- Partnership with TripAdvisor – leading OTx for trip planning by international audiences
- Programs especially for attractions with STA and Thomas Cook





## Item 4: Proposed Marketing Budget, Priorities and Target Markets

USA

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

Brand USA

# Proposed Marketing Budget, Priorities and Target Markets

- Marketing Priorities
- Current Markets & New Market Entry
- Proposed FY2017 Marketing Budget



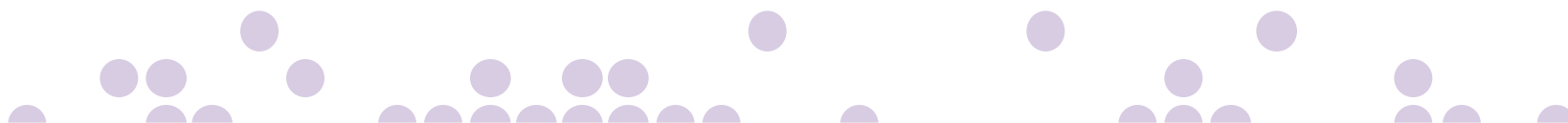
# Marketing Priorities

- Support Launch of New Campaign
- Support Launch of New Website
- Provide & Maximize Partner Value
- Fortify Global Trade Development Efforts
- Support Big Film #2 Initiative
- Invest in Path to 100 Million
- Evaluate New Market Entry Opportunities



# Target Markets

- Revised Path to 100 Million
- Expansion Opportunities
- Market Entry Evaluation



## Market Prioritization: Prime Volume Markets

- Canada
- Mexico
- United Kingdom
- China (Highest Growth Potential)
- Brazil (Highest Growth Potential)

2014

% '13

23 M

- 1.8%

17.3 M

+ 19%

4 M

+ 3.6%

2.2 M

+ 21.1%

2.3 M

+ 9.9%

\* Source: Brand USA Path FY15



## Market Prioritization: Targeted Volume Markets

- Japan
- Australia
- India
- Germany
- South Korea

2014	% '13
3.6 M	- 4%
1.3 M	+ 5.9%
960 K	+ 11.9%
1.9 M	+ 2.7%
1.4 M	+ 6.6%

\* Source: Brand USA Path FY15



## Market Prioritization: New Volume Markets

- France
- Sweden
- Colombia
- Chile

**2014**

**% '13**

**1.6 M**

**+ 8%**

**540 K**

**+ 14%**

**881 K**

**+ 18%**

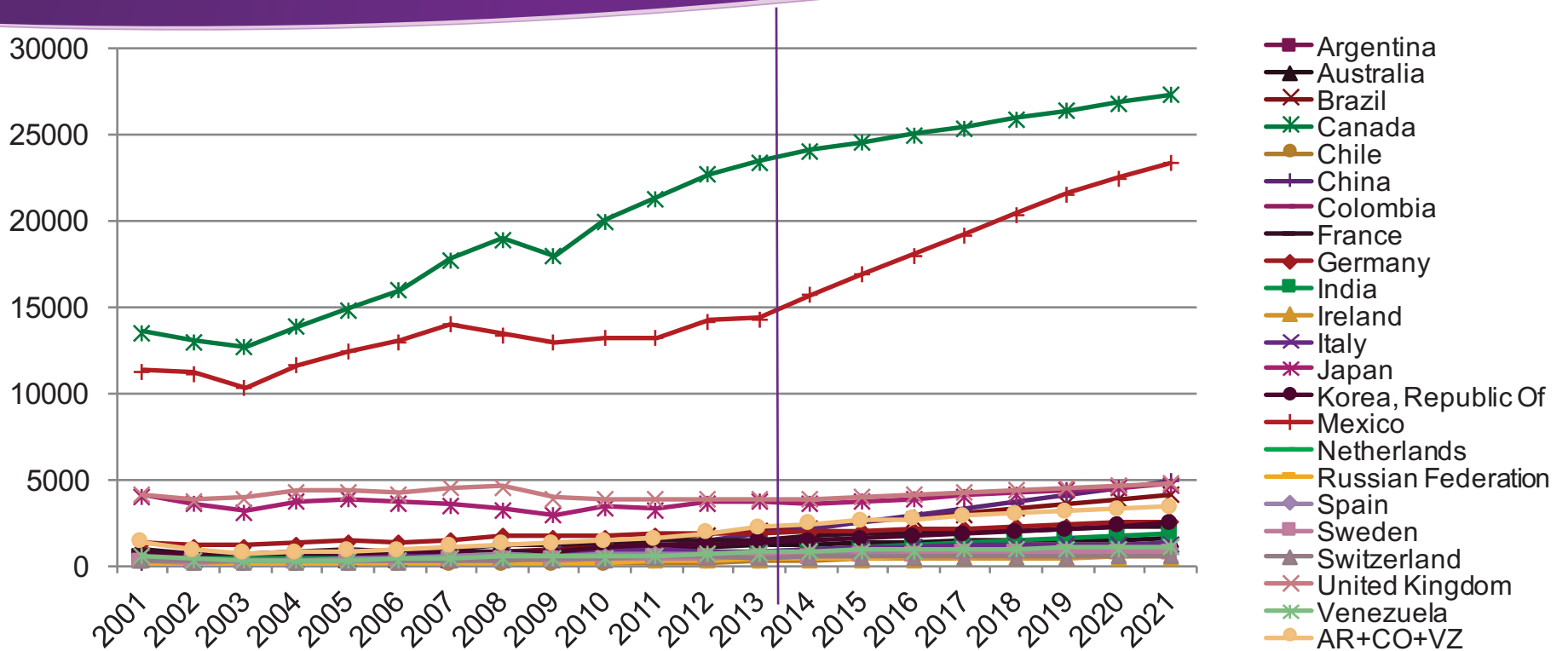
**249 K**

**+ 17%**

\* Source: Brand USA Path FY15



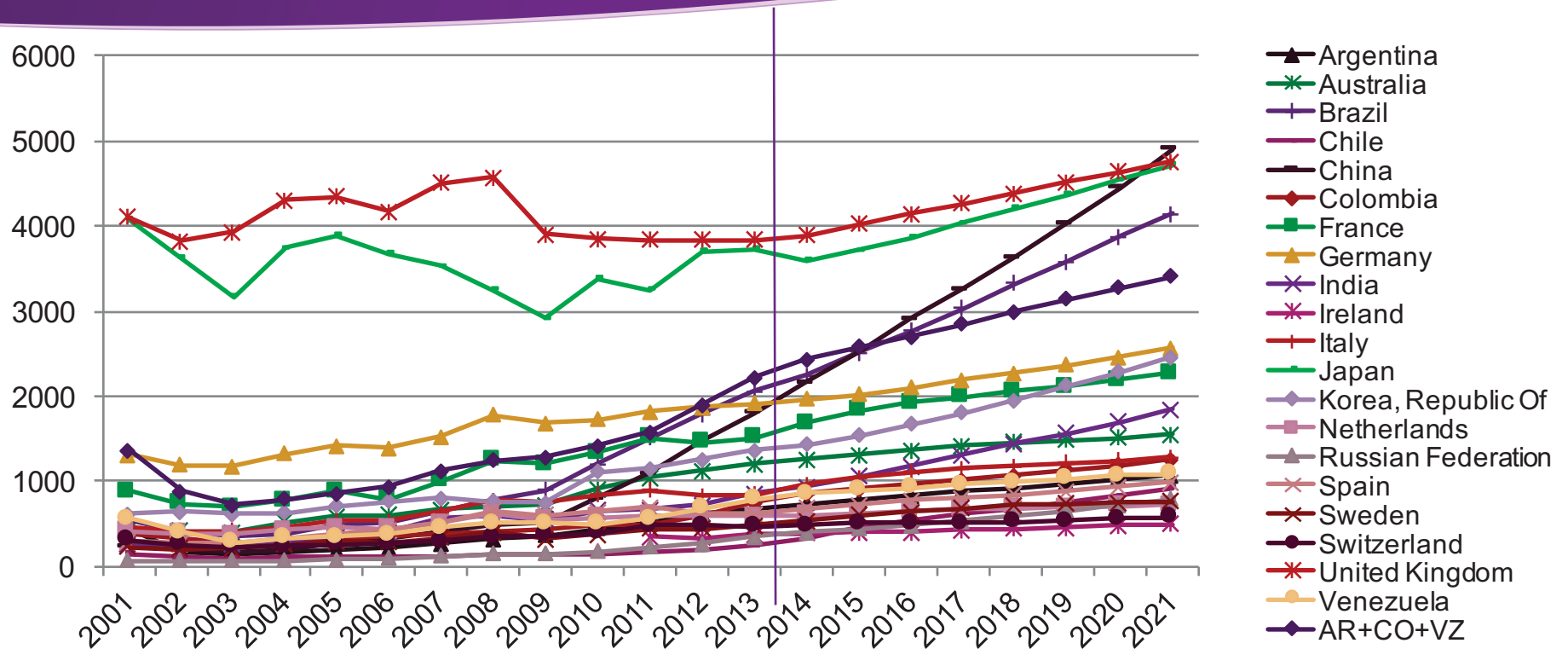
# Path to 100 Million Arrivals



\* Source: Brand USA Path FY15



# Path to 100 Million Arrivals



\* Source: Brand USA Path FY15



# Preliminary/Anticipated NTTO Results

Canada	-10.0%
Mexico	8.0%
Overseas	3.4%
<b>Total Growth</b>	<b>0.3%</b>

\* Source: Brand USA Path FY15



# Path to 100 Million

Previous Required Growth Rate by 2021 4.2%

Revised Pace 4.84%

\* Source: Brand USA Path FY15



## Contribution to Path to 100 Million

Country	Revised 2014	Prev. 2021	Revised 2021	Prev. 2021/2014 Growth	Revised 2021/2014 Growth	Revised Growth	% of Target
<b>Canada</b>	23,014	<b>26,744</b>	<b>24,978</b>	16%	9%	1,965	8%
Mexico	17,070	24,153	25,066	39%	47%	7,996	32%
United Kingdom	3,973	4,893	5,135	23%	29%	1,162	5%
Japan	3,579	4,252	4,252	19%	19%	673	3%
<b>Brazil</b>	2,264	<b>3,260</b>	<b>2,773</b>	44%	22%	509	2%
China	2,188	4,728	4,880	116%	123%	2,692	11%
Germany	1,969	2,449	2,773	24%	41%	805	3%
France	1,625	2,224	2,308	37%	42%	683	3%
South Korea	1,450	2,335	2,688	61%	85%	1,238	5%
Australia	1,276	1,688	1,750	32%	37%	474	2%
India	962	1,853	2,885	93%	200%	1,923	8%
Italy	934	1,275	1,311	36%	40%	377	2%

\* Source:  
Brand USA  
Path FY15

## Contribution to Path to 100 Million

Country	Revised 2014	Prev. 2021	Revised 2021	Prev. 2021/2014 Growth	Revised 2021/2014 Growth	Revised Growth	% of Target
Colombia	881	1,614	1,449	83%	64%	567	2%
Spain	700	944	1,024	35%	46%	324	1%
Argentina	685	735	845	7%	23%	161	1%
Venezuela	616	547	636	-11%	3%	20	0%
Netherlands	616	810	884	32%	44%	268	1%
Sweden	543	736	798	35%	47%	255	1%
Switzerland	487	607	684	25%	41%	197	1%
Taiwan	413	568	723	37%	75%	310	1%
Chile	249	422	422	69%	69%	173	1%
Subtotal	65,492	86,837	88,266				
Other	9,519	13,163	11,734				
<b>TOTAL</b>	<b>75,011</b>	<b>100,000</b>	<b>100,000</b>				

\* Source:  
Brand USA  
Path FY15

# Market Expansion

	2014	% '13
France	1.6 M	+ 8%
Netherlands	616 K	+ 5%
Italy	934 K	+ 11%

\* Source: Brand USA Path FY15



# Market Performance: France

Year	Arrivals	% Change
2007	998,000	-
2010	1,342,000	35%
2014	1,625,000	21%

\* Source: Brand USA Path FY15



## France – Revised Path

Year	Arrivals	% Change
2014	1,625,000	-
2021	2,308,000	42%

\* Source: Brand USA Path FY15



## Market Performance - Netherlands

Year	Arrivals	% Change
2007	507,000	-
2010	570,000	13%
2014	616,000	8%

\* Source: Brand USA Path FY15



# Netherlands – Revised Path

Year	Arrivals	% Change
2014	616,000	-
2021	884,000	44%

\* Source: Brand USA Path FY15



## Market Performance - Italy

Year	Arrivals	% Change
2007	634,000	-
2010	838,000	33%
2014	934,000	12%

\* Source: Brand USA Path FY15



## Italy – Revised Path

Year	Arrivals	% Change
2014	934,000	-
2021	1,311,000	40%

\* Source: Brand USA Path FY15



## Market Performance 2014

France	#7 in Raw Growth	+ 683,000 Arrivals
France	#10 in Percentage Growth	+42% Growth
France	# 10 in Overall Volume	2,308,000 Arrivals
France	# 12 in Visitor Spend	
Netherlands	# 15 in Raw Growth	+268,000 Arrivals
Netherlands	# 9 in Percentage Growth	+44 % Growth
Netherlands	# 15 in Overall Volume	884,000 Arrivals
Netherlands	# 13 in Visitor Spend	
Italy	#13 in Raw Growth	+377,000 Arrivals
Italy	#13 in Percentage Growth	+40% Growth
Italy	#13 in Overall Volume	1,311,000 Arrivals
Italy	#14 in Visitor Spend	

\* Source: Brand USA Path FY15

## 2021 Targeted Growth (Revised)

France	+ 683,000 Arrivals
Netherlands	+ 268,000 Arrivals
Italy	+ 96,000 Arrivals
	+ 1,047,000 Arrivals

\* Source: Brand USA Path FY17



# 2021 Targeted Growth

Country	% Growth
1. India	200%
2. China	123%
3. South Korea	85%
4. Chile	69%
5. Colombia	64%
6. Mexico	47%
6. Sweden	47%
8. Spain	46%
9. Netherlands	44%
10. France	42%

\* Source: Brand  
USA Path FY17



## 2021 Targeted Growth

Country	% Growth
11. Germany	41%
11. Switzerland	41%
13. Italy	40%
14. Australia	37%
15. United Kingdom	29%
16. Argentina	23%
17. Brazil	22%
18. Japan	19%
19. Canada	9%
20. Venezuela	3%

\* Source: Brand  
USA Path FY17





# Proposed FY2017 Marketing Budget



# FY 2015 Budget Review – Key Topics

- Major Programs and Initiatives
- Contributions Strategy
- Brand USA FY 2017 Budget Summary
- Departmental Budget Narratives

# Major Programs and Initiatives

- Increased Investment in Consumer Marketing for Growth in Key Markets and Expansion to New Markets
- The Big Film #2
- Global Trade Product Development
- Leveraging Major Partner Media

# Contributions Strategy

- Optimize Cash Contributions
- Maximize In-Kind Content Contributions
- Optimize In-Kind Contributions Tied to Marketing Partnership Agreements (MPAs)
- Ensure Contributions Momentum for the Start of Each Fiscal Year
- Leverage Partner Contributions to Extend Effective, Self-Sustaining Campaigns
- Create Media Efficiencies for Partners



# Revenue

Revenue Categories	FY 2016 Revenue Budget	FY 2017 Revenue Budget	% of Total FY 2017 Rev Budget	FY 2017 vs FY 2016 Revenue Budget	
Surplus Drawdown	15,235,830	14,979,800	9.14%	(256,030)	(1.68%)
Cash Contributions	50,000,000	50,000,000	30.50%	-	0.00%
Sponsorship Revenue	6,260,000	6,250,000	3.81%	(10,000)	(0.16%)
Travel Fund Proceeds	92,700,000	92,700,000	56.55%	-	0.00%
<b>Totals</b>	<b>164,195,830</b>	<b>163,929,800</b>	<b>100.00%</b>	<b>(266,030)</b>	<b>(0.16%)</b>

# Consumer Marketing

Expense Categories	FY 2016 Budget	FY 2017 Budget	FY 2017 vs FY 2016 Budget		FY 2016 Forecast
Digital Budget Expenditures	8,409,984	9,659,984	1,250,000	12.94%	7,670,332
Brand USA Media Budget Expenditures	13,250,000	20,000,000	6,750,000	33.75%	13,288,100
Other Media Programs	2,393,000	2,225,000	(168,000)	(7.55%)	1,877,484
Creative & Administrative Expenditures	5,382,560	6,300,000	917,440	14.56%	6,421,763
Global Sponsorship Marketing Activation	-	700,000	700,000	100.00%	-
Major Partner Initiative	-	-	-	0.00%	-
Special Projects	7,700,000	-	(7,700,000)	0.00%	7,793,225
<b>Totals</b>	<b>37,135,544</b>	<b>38,884,984</b>	<b>1,749,440</b>	<b>4.50%</b>	<b>37,050,904</b>

# Consumer Marketing

Expense Category	Change	Comments
Digital Budget Expenditures	↑	Support Launch of New Websites and increased emphasis on “Digital First” strategy including major investment in content strategy
Brand USA Media Budget Expenditures	↑	Market expansion and increased investment in growing markets
Other Media Programs	↓	Slight Decrease to adjust to Forecast
Creative & Administrative Expenditures	↑	Increased SOW to support Launch of New Campaign
Global Sponsorship Marketing Activation	↑	Supporting New Initiative
Special Projects	↓	FY16 Funds to support creation of campaign and websites

# Partner Marketing Services

Expense Categories	FY 2016 Budget	FY 2017 Budget	FY 2017 vs FY 2016 Budget		FY 2016 Forecast
Affinity Programs	3,000,000	3,000,000	-	0.00%	2,442,273
Originals Programs	9,250,000	10,000,000	750,000	7.50%	8,581,964
Big Film Distribution, Production, etc. (Sponsorship)	5,700,000	8,450,000	2,750,000	32.54%	5,640,592
LOA - Partner Media & Other Expenditures	25,209,268	27,400,000	2,190,732	8.00%	34,427,865
IPW	1,300,000	1,350,000	50,000	3.70%	1,300,000
LOA - Other Media Programs	25,000,000	22,700,000	(2,300,000)	(10.13%)	23,480,393
LOA Partner In-Market Trade Promotions	-	1,500,000	1,500,000	100.00%	-
LOA - Partner Travel, Meals, & Entertainment	540,000	500,000	(40,000)	(8.00%)	506,691
In-Kind Spending and Support	16,003,996	10,250,000	(5,753,996)	(56.14%)	13,052,259
Foreign Exchange Expense	500,000	500,000	(0)	(0.00%)	46,486
<b>Totals</b>	<b>86,503,264</b>	<b>85,650,000</b>	<b>(853,264)</b>	<b>(1.00%)</b>	<b>89,478,522</b>



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# Partner Marketing Services

Expense Category	Change	Comments
Affinity Programs	N/A	No change.
Originals Programs	↑	Slight Increase to support more Partners
Big Film Distribution, Production, etc. (Sponsorship)	↑	Schedule to support creation and production of Big Film #2
LOA – Partner Media & Other Expenditures	↑	Increase to support pace of expenditures
IPW	↑	Sponsorship schedule
LOA – Other Media Programs	↓	Program Efficiencies
LOA Partner In-Market Trade Promotions	↑	Transferred from Global Trade
LOA – Partner Travel, Meals, & Entertainment	↓	Slight Decrease
Foreign Exchange Expense	N/A	No change.

# FY17 Q1 Tradeshows and Missions

Month	Date	Market	Location	Event
OCTOBER	13-15	Italy	Rimini	TTG
OCTOBER	19-21	Singapore	Singapore City	ITB Asia
NOVEMBER	1-3	Spain	Barcelona	IBTM World
NOVEMBER	4-7	Taiwan	Taipei	Taipei International Travel Fair
NOVEMBER	7-9	UK	London	WTM London
NOVEMBER	11-13	China	Shanghai	CITM
NOVEMBER	14-17	Spain	Mallorca	IGTM
NOVEMBER	29-Dec 1	Spain	Barcelona	IBTM World

\*subject to change, register at [BrandUSAPavilion.com](http://BrandUSAPavilion.com)



# FY17 Q2 Tradeshows and Missions

Month	Date	Market	Location	Event
JANUARY	11-15	Netherlands	Utrecht	Vakantiebeurs
JANUARY	18-22	Spain	Madrid	FITUR
FEBRUARY	15-17	India	New Delhi	SATTE
FEBRUARY	20-22	Australia	Melbourne	Visit USA Expo & Brand USA B2B & IMM
FEBRUARY	23-25	China	Guangzhou	GITF
MARCH	1-3	Colombia	Bogota	ANATO*
MARCH	8-12	Germany	Berlin	ITB Berlin
MARCH	TBD	China	Various Cities	Brand USA China Sales Mission
MARCH	TBD	Brazil	Various Cities	B2B Session

\*subject to change, register at [BrandUSAPavilion.com](http://BrandUSAPavilion.com)



# FY17 Q3 & Q4 Tradeshows and Missions

Month	Date	Market	Location	Event
APRIL	4-6	Brazil	Sao Paulo	WTM - Latin America
APRIL	24-27	UAE	Dubai	ATM
MAY	16-18	Germany	Frankfurt	IMEX
JUNE	2-8	USA	Washington D.C.	IPW
JUNE	TBD	China	Beijing	BITE Trade Show
JUNE	15-17	Hong Kong	Hong Kong	International Trade Exhibition (ITE) Hong Kong 2017
SEPTEMBER	TBD	Japan	Tokyo	JATA
SEPTEMBER	TBD	India	Various Cities	Brand USA India Sales Mission

\*subject to change, register at [BrandUSAPavilion.com](http://BrandUSAPavilion.com)



# Global Market Development

Expense Categories	FY 2016 Budget	FY 2017 Budget	FY 2017 vs FY 2016 Budget		FY 2016 Forecast
GSA Fees	8,195,597	7,950,000	(245,597)	(3.09%)	7,875,390
Brand USA Trade Show Event Expenses	4,082,545	2,632,948	(1,449,597)	(55.06%)	2,083,512
Business Development Travel & Entertainment	250,000	300,000	50,000	16.67%	250,000
LOA Trade Show Expenses	1,208,727	-	(1,208,727)	0.00%	1,121,430
Visit USA / U.S. Commercial Service Collaboration	500,000	500,000	0	0.00%	423,985
Missions	500,000	600,000	100,000	16.67%	500,000
USA China Summit	250,000	250,000	0	386.67%	235,714
Marketing Activation Programs	-	966,670	966,670	(6.10%)	-
USA Discovery Program	358,925	300,000	(58,925)	(19.64%)	337,791
Product Development	-	400,000	400,000	100.00%	-
Tool Kits	-	250,000	250,000	100.00%	-
<b>Totals</b>	<b>15,345,794</b>	<b>14,149,618</b>	<b>(1,196,176)</b>	<b>(8.45%)</b>	<b>12,827,821</b>

# Global Market Development

Expense Category	Change	Comments
GSA Fees	↓	Programs continue to be fine-tuned
Brand USA Trade Show Event Expenses	↓	Reduction supported by leveraging other resources
Business Development Travel & Entertainment	↑	Increased Activity
LOA – Trade Show Expenditures	↓	Program Consolidated with Partner Marketing
Visit USA / U.S. Commercial Service Collaboration	N/A	No change.
Missions	↑	Increased Activity including B2B events

# Global Market Development

(continued)

Expense Category	Change	Comments
USA China Summit	N/A	No change.
Marketing Activation Programs	↑	Expanded programs
USA Discovery Program	↓	2 New Target Markets (Germany, S. Korea)
Product Development	↑	New Training Initiative
Tool Kits	↑	New Training Initiative

# Market Research

Expense Categories	FY 2016 Budget	FY 2017 Budget	FY 2017 vs FY 2016 Budget		FY 2016 Forecast
Market Research	2,470,000	2,470,000	-	0.00%	2,231,364
Travel, Meals, & Entertainment	38,400	38,400	-	0.00%	33,005
<b>Totals</b>	<b>2,508,400</b>	<b>2,508,400</b>	<b>-</b>	<b>0.00%</b>	<b>2,264,368</b>

# Market Research

Expense Category	Change	Comments
Market Research	N/A	No change.
Travel, Meals, & Entertainment	N/A	No change.

# Summary

Department	FY 2016 Expense Budget	FY 2017 Expense Budget	% of Total FY 2017 Exp Budget	FY 2017 vs FY 2016 Expense Budget	
Operations	15,927,752	15,499,929	9.46%	(427,823)	(2.69%)
Communications	6,775,075	7,236,868	4.41%	461,793	6.82%
Consumer Marketing	37,135,544	38,884,984	23.72%	1,749,440	4.71%
Partner Marketing Services	86,503,264	85,650,000	52.25%	(853,264)	(0.99%)
Global Market Development	15,345,794	14,149,618	8.63%	(1,196,176)	(7.79%)
Market Research	2,508,400	2,508,400	1.53%	-	0.00%
Proposed Additional Spend			0.00%	-	0.00%
Marketing Department Sub-total	141,493,003	141,193,002	86.13%	(300,000)	(0.21%)
<b>Totals</b>	<b>164,195,830</b>	<b>163,929,800</b>	<b>100.00%</b>	<b>(266,030)</b>	<b>(0.16%)</b>



# Open the Meeting up for Q/A and Discussion





# Closing Remarks and Adjourn Meeting

USA

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