



# Marketing Committee Meeting

September 13, 2017





# OPENING REMARKS



# APPROVAL OF MINUTES



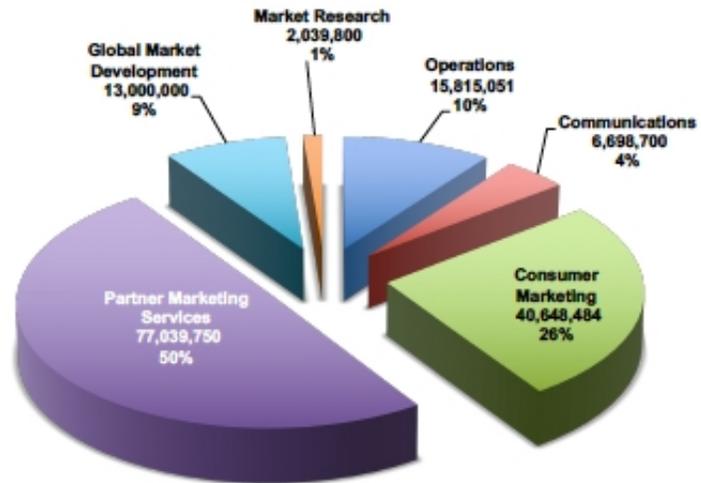
# BUDGET REVIEW



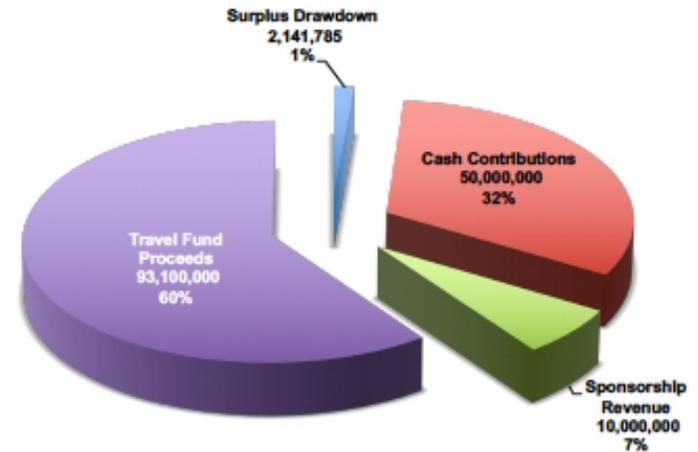
# FY2018 Budget



**FY 2018 Expense Budget**  
**\$155,241,785**



**FY 2018 Revenue Budget**  
**\$155,241,785**



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

# FY'18 PLANNING/CONSUMER MARKET PRIORITIZATION TIERS

USA

VisitTheUSA.com

Brand USA



## Integration is Key

- In 2018 and beyond, Brand USA's goal is to get much closer to each market, ensuring that our media and messaging is topical, timely and engaging.
- Toward this end, our approach to marketing will be a collaborative effort with our Partner and Trade Marketing teams.
- The intent is to create more efficient spending and more relevant content that delivers on business opportunities and integrates our efforts to drive greater ROI.



# Business Objectives

## Global Focus

- Drive 100MM international visitors to the USA by 2021 (\$256B in spending)
- Secure \$100MM by developing marketing opportunities and alliances for our partners that they could not achieve on their own



# Global Media Strategy

- Maximize efficiency.
  - Optimize and specialize media buys for the most effective platforms/providers.
- Continue to fine tune creative machine.
  - Media mix (and message) should invoke a sense of wonder and encourage activation.
- Specify efforts to focus on either inspiration, consideration, or activation based on season and market dynamics.
- Leverage music & culture theme in all marketing platforms and support film initiatives.
- Integrate consumer, partner and trade efforts across Brand USA assets.

# Planning Approach



## Powered by Social

- Frequent lightweight communications on social media will keep the United States top of mind and reinforce our strategic pillars in a relatable, welcoming, and unbranded voice while addressing key Moments in the journey (see architecture for details).

## Third Party Endorsement

- For the segment of potential travelers to the US that have a negative reaction to US politics and feel the country is less than welcoming, and who may give less credibility to the messaging from the tourism marketing firm of the United States of America, we may have more success by being endorsed informally and indirectly by Influencers, bloggers, local in-market celebrities, and specific city DMOs. Using their voice and channels may be more beneficial for our mission. The success of our FY17 campaigns should indicate which market and to what level we should implement this approach.

## Center of Gravity

- In addition to social media, consider the media mix best targeted to each market, including display, OLV, and other alternative media to bring attention to our trip planning content, videos, and interactive social posts.

# Messaging Platforms

## Possibility [Product Benefit]

- Whether geographical, emotional or sensory, the experiences you can have while traveling in the States are unique and diverse. The possibilities are endless and totally up to you.
  - Bringing It to Life:
    - Lead with authentic experiences
    - Show a diverse range of points of interest, both lesser known and iconic USA destinations
    - Highlight how travelers can personalize a trip to the USA based on personal preferences

## Proximity [Value Proposition]

- You can see the beach, snow and desert, all in a single day in Southern California. Or explore several states on the East Coast in less than a week. Our regions are incredibly diverse and easily accessible, so you never have to settle for one experience.
  - Bringing it to life:
    - Demonstrate the interconnectedness of diverse experiences
    - Use maps and visual language to show distance/proximity of experiences
    - Provide itineraries that show the possibilities within a 5-hour radius

# Consumer Market Prioritization Tiers

## One Size Does Not Fit All

- Tier 1: Permeate the Culture (Custom Programming)
  - China, India
- Tier 2: Influence & Inspire (Influencer Focus)
  - Korea, Mexico and Brazil
- Tier 3: Make it Easy & Obvious (Engage & Activate\*)
  - Australia, Canada, France, Germany, Japan, UK
- Tier 4: Reach Hand-raisers & Fans (Paid Search, Organic Social)
  - Chile, Colombia, Sweden

\*Markets receiving the Expedia consideration to activation campaign – UK, CA, MX, AU

# Tier 1: Permeate the Culture / China



## 2018 Goal/Outlook: 3.75 million visitors, +11% from 2017

### Target Traveler

- First time and seasoned travelers who want a deeper USA experience; young, urban, upwardly-mobile couples, “travel pals” and new families
  - Drivers: Social status/bragging rights, famous icons, sense of freedom; interest in “living like a local” in the USA, nature/landscapes/wide open spaces, shopping, cultural attractions
  - Barriers: Language challenges (wayfinding); perception that the USA may not be welcoming

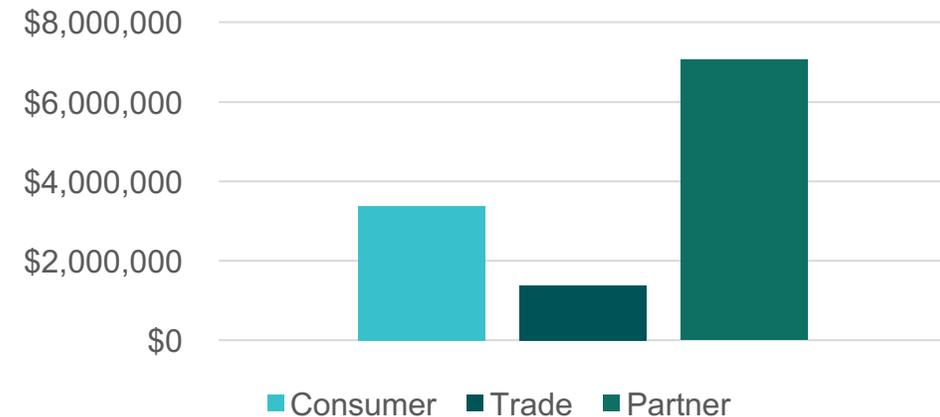
### Consumer Message Strategy

- Cultural aspects of the U.S.
- Chinese pop culture overlaid onto USA pop culture
- Emphasize social status, freedom, iconic experiences
- U.S. is warm and welcoming

### Trade Strategy

- Product development beyond the gateway & supporting the Music & Culture theme
- Reaching millennials
- Training in tier 2 cities (Wuhan, Shenyang)
- Encourage repeat visits
- Integrated activation coops

### 2018 Marketing Budget



# Tier 1: Permeate the Culture / China



Program	Neighborhoods/Cities/Towns												Entertainment/Culture						Road Trips						Great Outdoors													
	Oct-17				Nov-17				Dec-17				Jan-18			Feb-18			Mar-18			Apr-18			May-18			Jun-18			Jul-18			Aug-18			Sep-18	
Inspiration Guide 2018																																						
Spring Multi-Channel Campaign																																						
Fall Multi-Channel Campaign																																						
Market Specific																																						
Consumer Brand Campaign, Social, SEM																																						
Trade Activity																																						

- Partner Programs
- USA Campaign
- Trade Activity

# Tier 1: Permeate the Culture / India

**2018 Goal/Outlook: 1.4 million visitors, +11% from 2017**

## Target Traveler

- Affluent, urban travelers connecting with far-flung family & friends
  - Drivers: Reconnecting with loved ones; social status/bragging rights; shopping, sightseeing, pop culture, landscapes and culinary.
  - Barriers: Strength of USD, time and effort required to plan the trip; perception the USA may not be welcoming

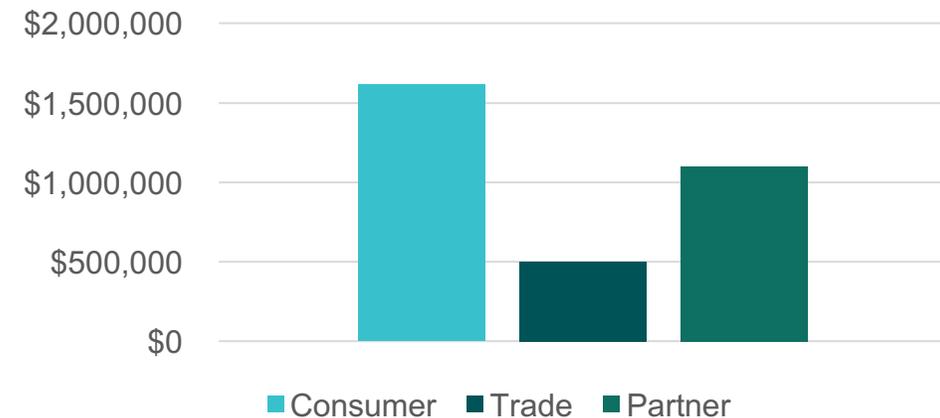
## Consumer Message Strategy

- Value messaging
- Welcome messaging
- Iconic destinations/attractions
- Local lifestyle/ Pop Culture

## Trade Strategy

- Product development beyond the gateway & supporting the Music & Culture theme
- Reaching millennials
- Destination training
- Encourage repeat visits
- Integrated activation coops

## 2018 Marketing Budget





# Tier 2: Influence & Inspire / South Korea

**2018 Goal/Outlook: 2.3 million visitors, +7% from 2017**

## Target Traveler

- Young, urban, experienced travelers (female skew) who see travel as an opportunity to express burgeoning individuality, and bragging rights of experiencing iconic destinations. The “ultimate trip.”
  - *Drivers:* Social status/bragging rights; natural landscapes, local culture, iconic destinations, pop culture, reputation as a great vacation destination (WOM)
  - *Barriers:* More accessible destinations divide share of interest (AU); travel to the US is less special because of the distance; many have already visited and seen the sights

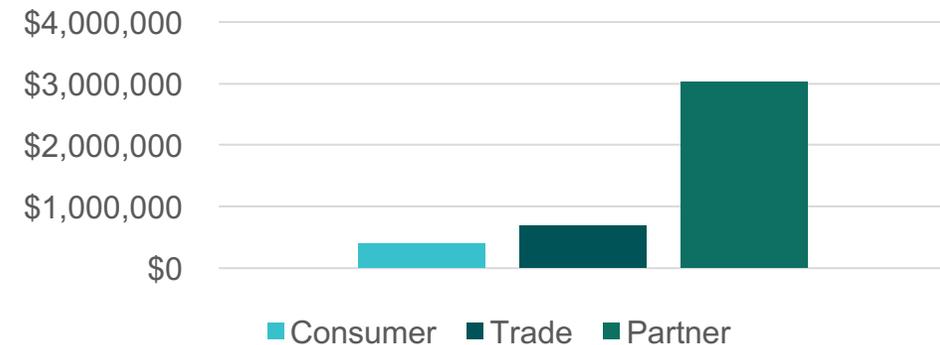
## Consumer Message Strategy:

- Portray the US as the best of all worlds— landmarks, unique experiences and leisure unrivaled anywhere else on the globe
- Tap into the strong Korean influencer culture

## Trade Strategy

- Product development beyond the gateway & supporting the Music & Culture theme
- Reaching millennials
- Destination training
- Integrated activation coops

## 2018 Marketing Budget





# Tier 2: Inspire & Influence / Mexico



## 2018 Goal/Outlook: 20 million visitors, +4% from 2017

### Target Traveler

- Families with children under 18 with the means to travel, not only to the U.S. but other destinations
  - Drivers: Natural beauty, sightseeing, shopping, dining, nightlife, attractions
  - Barriers: Strength of the USD, perception that the USA is unwelcoming

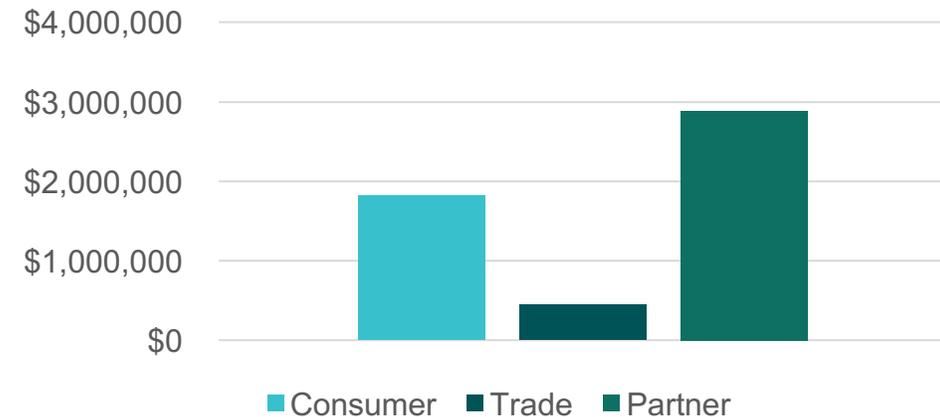
### Consumer Messaging Strategy

- Focus on welcome messaging
- Surprise & delight
- Iconic and unusual, family-oriented attractions
- Use native voice and third party endorsement to drive interest
- Focus on flights/convenience

### Trade Strategy

- Revamp trade office strategy
- Offer new product experience
- Focus on welcome messaging
- Integrated activation coops

### 2018 Marketing Budget



# Tier 2: Inspire & Influence / Mexico



	Neighborhoods/Cities/Towns						Entertainment/Culture						Road Trips						Great Outdoors					
Program	Oct-17		Nov-17		Dec-17		Jan-18		Feb-18		Mar-18		Apr-18		May-18		Jun-18		Jul-18		Aug-18		Sep-18	
Spring Multi-Channel Campaign																								
Culinary 2017/2018 Print Guide																								
Market Specific																								
Consumer Brand Campaign, Social, SEM																								
Trade Activity																								

-  Partner Programs
-  USA Campaign
-  Trade Activity

# Tier 2: Inspire & Influence / Brazil

## 2018 Goal/Outlook: 1.5 million visitors, flat from 2017

### Target Traveler

- First time travelers; experienced travelers visiting the U.S. for the 2nd or 3rd time
  - Drivers: Natural beauty, sightseeing, shopping, dining, nightlife, attractions
  - Barriers: Strength of the USD, perception that the USA is unwelcoming

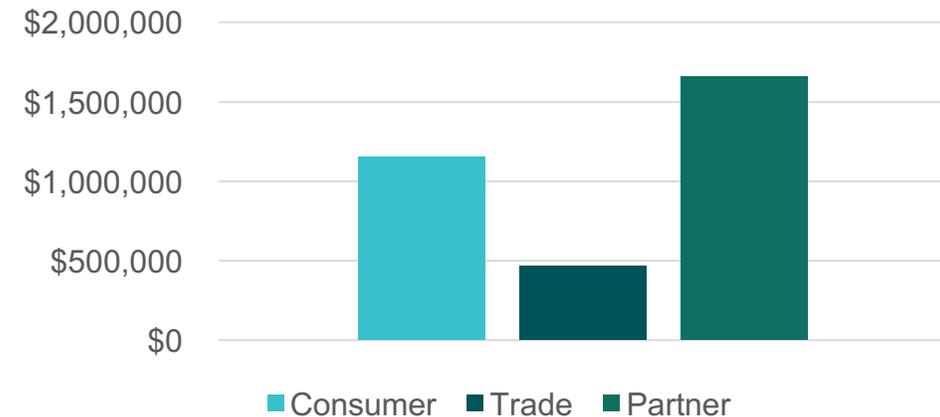
### Consumer Message Strategy

- Personal storytelling
- Adventurous experiences and 'beyond gateways'
- Introduce iconic experiences to share

### Trade Strategy

- Product development beyond the gateway & supporting the Music & Culture theme
- Reaching millennials & families
- Destination training
- Integrated activation coops

### 2018 Marketing Budget





# Tier 3: Make It Obvious & Easy

 Australia	 Canada	 France	 Germany	 Japan	 UK
<b>2018 Goal</b>	<b>2018 Goal</b>	<b>2018 Goal</b>	<b>2018 Goal</b>	<b>2018 Goal</b>	<b>2018 Goal</b>
1.4 Million visitors	19.3 Million visitors	1.6 Million visitors	2 Million visitors	3.6 Million visitors	4.6 Million visitors
<b>Target Traveler</b>	<b>Target Traveler</b>	<b>Target Traveler</b>	<b>Target Traveler</b>	<b>Target Traveler</b>	<b>Target Traveler</b>
Young, urban professional	Young, urban professional	Young, urban professional	Young, urban professional	Young, urban professional	Young, urban professional
<b>Consumer Strategy</b>	<b>Consumer Strategy</b>	<b>Consumer Strategy</b>	<b>Consumer Strategy</b>	<b>Consumer Strategy</b>	<b>Consumer Strategy</b>
Redefine value to focus on experiences rather than time/cost	Redefine value to focus on experiences rather than time/cost	Focus on unique, local experiences that create FOMO to drive interest and urgency	Redefine value to focus on experiences rather than time/cost.	Unique, quirky story telling Provide detail itineraries	Redefine value to focus on experiences rather than time/cost
<b>Trade Strategy</b>	<b>Trade Strategy</b>	<b>Trade Strategy</b>	<b>Trade Strategy</b>	<b>Trade Strategy</b>	<b>Trade Strategy</b>
Integrated Co-ops/ film	Focus on West coast	Establish a greater presence in market	Integrating digital capabilities	Engage both leisure and MICE travelers	Integrated Co-ops/ film

# Tier 4: Reach Hand-raisers & Fans



SWEDEN

**2018 Goal**

576,000 visitors

**Target Traveler**

Young, urban professional

**Consumer Strategy**

Maintain dialogue with organic social and website content



COLOMBIA

**2018 Goal**

915,000 visitors

**Target Traveler**

Young, affluent urban families

**Consumer Strategy**

Maintain dialogue with organic social and website content

CHILE

**2018 Goal**

350,000 visitors

**Target Traveler**

Young, affluent urban families

**Consumer Strategy**

Maintain dialogue with organic social and website content



# GLOBAL UPDATE

# Trade Activity Map



# International Representation RFP Update

- **Completed**

- Brazil
- India
- The UK & Ireland
- Australia & New Zealand

- **In process**

- Mexico
- Canada
- Italy/Spain
- China
- Germany
- France
- Europe

- **Scheduled**

- Korea – October
- Japan – October
- Hong Kong/Taiwan/Singapore – January 2018



# EXAMPLE OF A MICRO INFLUENCER

# Chase Dong

— BRANDUSA OUTDOOR AMBASSADOR



# BIOGRAPHY

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2013 – Master’s Degree from University of Pennsylvania

2016 – Traveled through 60+ U.S. destinations in 101 days

Treks through national parks, trails, and forests and wanders from the most isolated areas to the most dangerous peaks

Successfully carves a niche in outdoor adventure traveling

Establishes a strong loyal fan base

Positions himself as the trendsetter/KOL in the tourism marketing



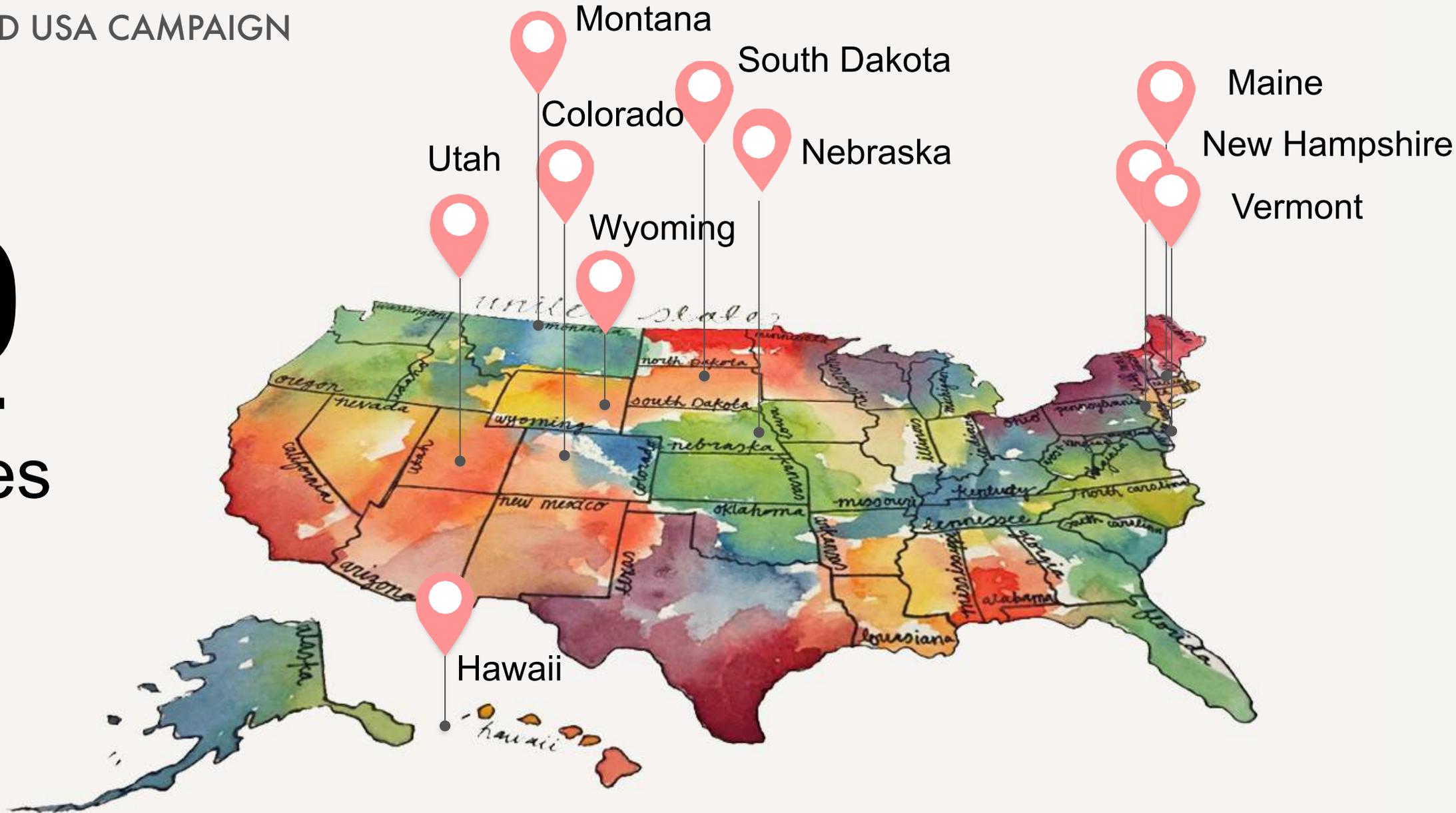
# Chase Dong

# JOURNEY

2016 BRAND USA CAMPAIGN

101 DAYS

10  
States

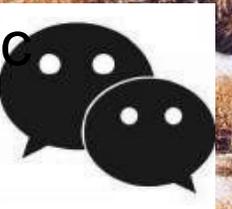


PERFORMANCE

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6,553,430 Total Reads

20,483 Total Engagement





**MOVIE PRODUCTION UPDATE**

**USA**  
VisitTheUSA.com

**Brand USA**



# *National Parks Adventure Update*

- Audience to date: 4 million
- Youku streaming views: 839,000
- Total global trailer views: over 60 million
- Currently showing in 46 international cities

# America's Musical Journey Production Update

- Projected launch date is still on track for February 2018. World Premiere will be taking place in Washington DC and rolled out globally over the following weeks and months.
- Locations filmed to date include New York City, Miami, Washington DC, Chicago, New Orleans, Detroit and aeriels of Seattle.
- Locations that will be shooting in August through October include Nashville, Memphis, Los Angeles, Seattle, Austin, St Louis, Charleston, Oklahoma City, Colorado and Albuquerque.
- Movie title is being adjusted to more clearly address the musical subject matter; recommendations and initial key art is expected within the next two weeks (w/o 8/21 or earlier).

MacGillivray Freeman's

# AMERICA'S MUSICAL JOURNEY

COMING SOON TO GIANT SCREEN THEATRES

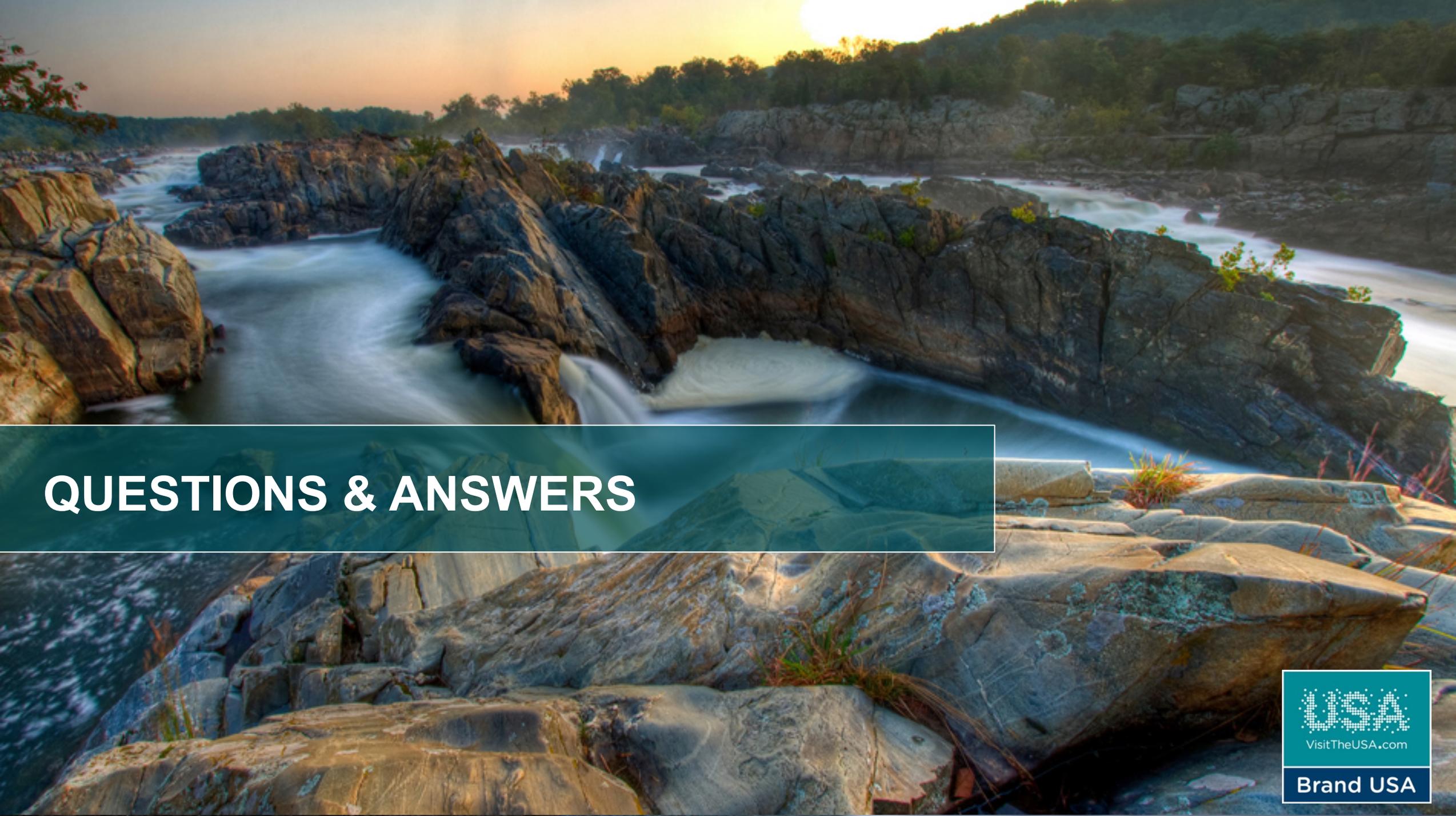
FEBRUARY 2018

[www.AmericasMusicalJourney.com](http://www.AmericasMusicalJourney.com)

MACGILLIVRAY  
FREEMAN  
FILMS

 Expedia

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# QUESTIONS & ANSWERS





# CLOSING REMARKS

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# Thank You

