



Marketing Committee Meeting

September 15, 2016



Opening Remarks and Introductions



Barbara Richardson

Chair, Marketing Committee

Brand USA Marketing Committee



Barbara Richardson
Chair



John Edman



Kyle Edmiston



Randy Garfield



Rossi Ralenkotter



Mark Schwab

Marketing Committee Meeting Agenda

- **Opening Remarks**
 - Call the Meeting to Order
 - Introductions: Management, Legal Counsel, and Invited Guests
- **Item 1: Approval of the Minutes from the June 2, 2016 Meeting***
- **Item 2: CMO Report**
- **Item 3: Concept Testing/Results**
- **Item 4: International Representation Strategy and RFPs**
- **Item 5: Year-End Partner Contributions Report**
- **Item 6: Film Update**
- **Discussion and Q & A**
- **Closing Remarks and Adjourn Meeting**

* vote required



Item 1: Approval of the Minutes

USA

VisitTheUSA.com

Brand USA



Item 2: CMO Report

USA

VisitTheUSA.com

Brand USA



Item 3: Concept Testing/Results

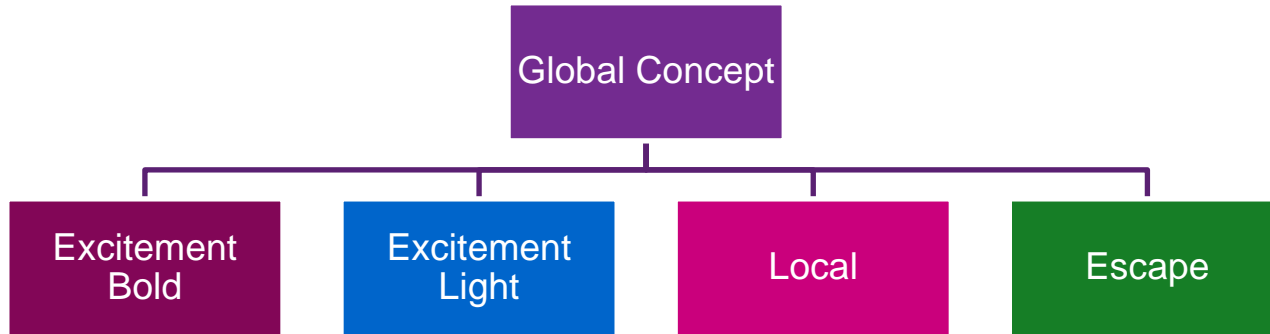
USA

VisitTheUSA.com

Brand USA

Phase 1 Concept Testing Objective

Select one global concept that will act as an overarching message across trip persona-driven executions in each market.



Core Trip Personas

Bold

Light

Excitement

Non-Routine, Indulgence

Excitement trips are all about the iconic sights and experiences – the big, exciting, *must-sees*.

Their motivations are a combination of wanting fun, indulgence and to escape the routine. They will be interested in mostly high-energy experiences and activities.

Escape

Non-Routine, De-Stress

Escape trips are more low-energy. The Great Outdoors (e.g. national parks and beaches) will resonate strongly with this group.

First and foremost, their motivation is to recharge and relax. These travelers are very focused on non-routine experiences (different from what they can get at home).

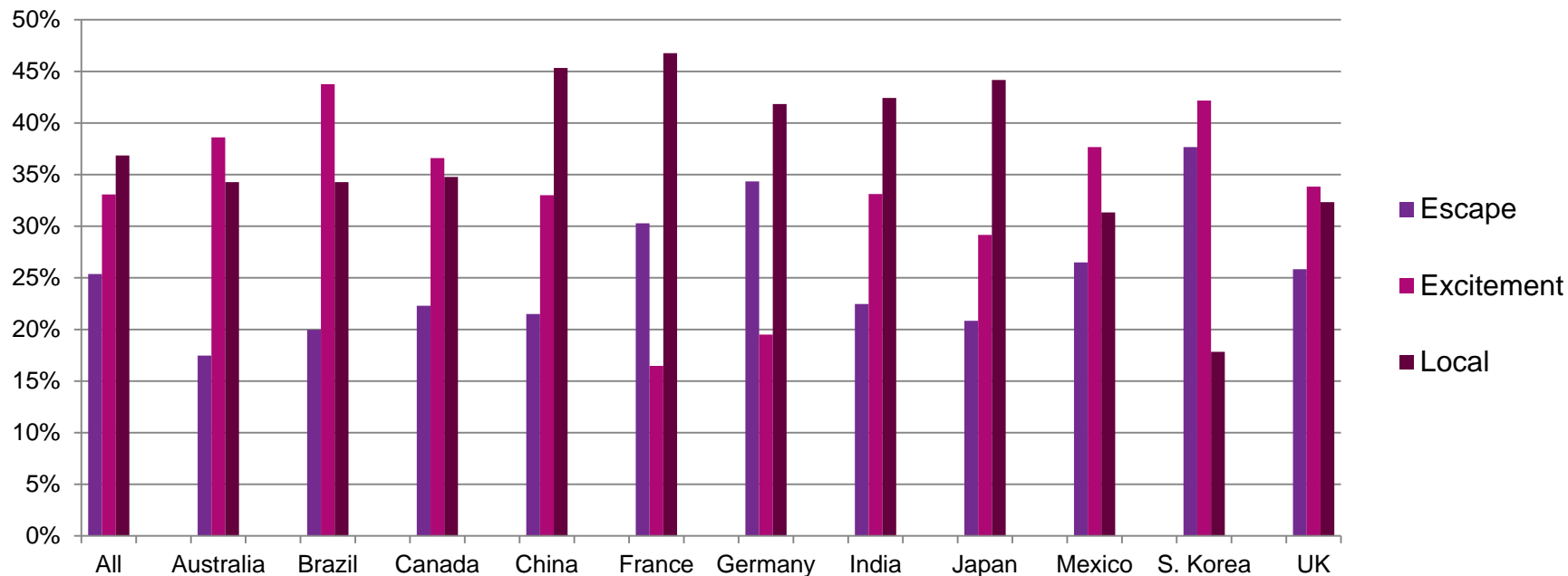
Local

Destination Calling, Indulgence

Local trips are focused on what's special or unique for an area. Travelers will be looking for off the beaten path and destination-centric experiences.

Their motivation is to discover what makes a given place special and find the experiences that they could only do there.

Volume of Segment Types by Country



Key Consumer Evaluation Criteria

- Believability/authenticity
- Increase in desire to visit
- Drive to action
- Differentiation
- Welcoming tone
- Ability to capture attention
- Clarity

Additional Evaluation Criteria

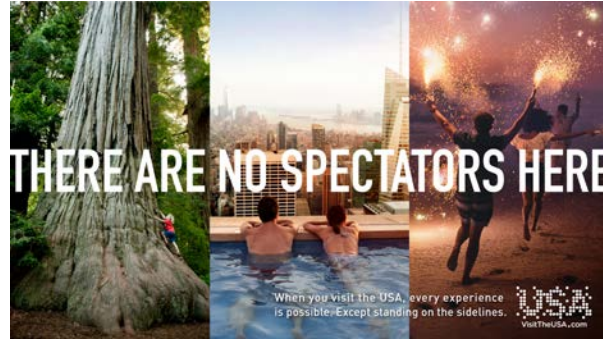
- Flexibility (ability to adjust to media formats, personas as well as partners)
- Ability to communicate our brand story and establish archetype
 - Consumer = Hero
 - USA = Magician
 - Antagonist = (Persona driven) Monotony, Stress, Excuses/Guilt

Core Concept Messages



Anything is possible here

- Self actualization
- Control



You are part of our story

- Esteem/belonging
- Self actualization



You belong here

- Esteem/belonging
- Control

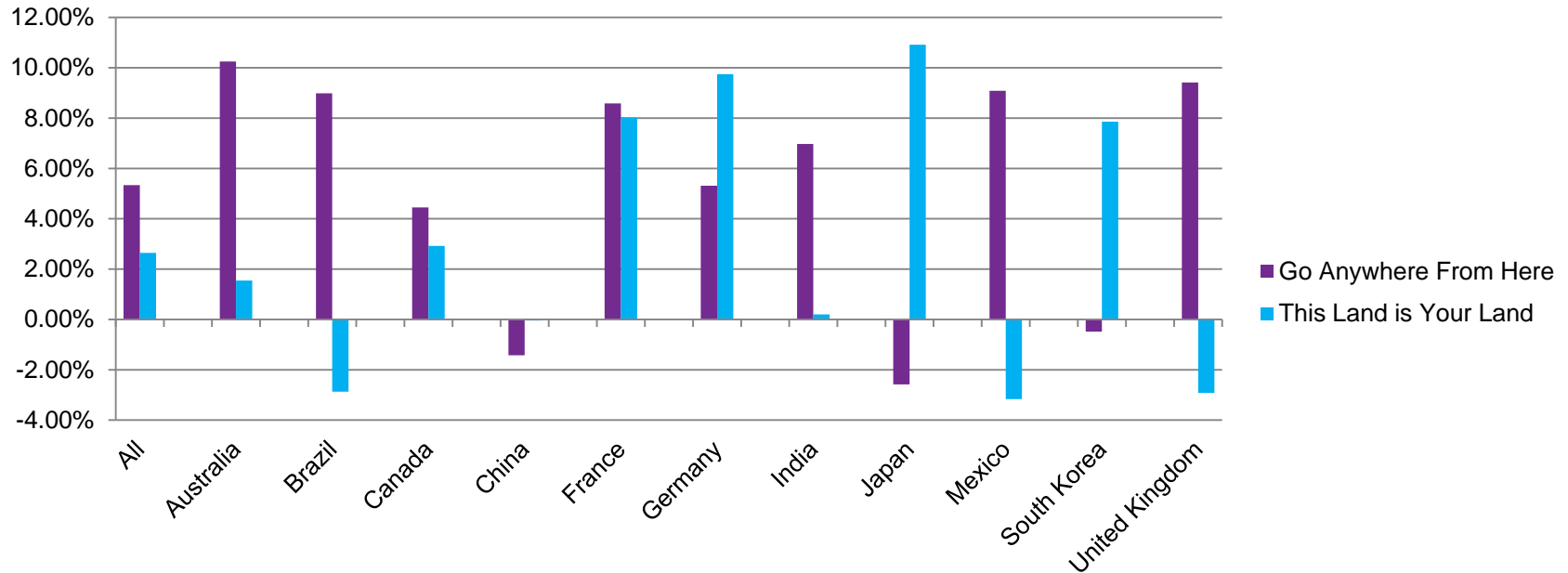


Concept Testing Methodology

- Online survey conducted by Carbonview
- 11 markets (CA, MX, BR, UK, DE, FR, IN, CN, JP, KR, AU)
- 600 qualified completes per market
- Quali/Quant hybrid approach
- Static image and video formats

Static Concept – Believability

“Based upon everything you know about the USA, how believable do you feel each advertisement is?”



**Bars illustrate Top 2 Box (“4 – Somewhat believable and 5 – Extremely believable”) scores compared to the average Top 2 Box score of the three video concepts (baseline)*

Go Anywhere from Here Qualitative Results

- “**‘Go Anywhere from Here’** gives you the belief that **anything is possible.**” – Australia
- “I like the different states of feelings the images give, and as you enter into the United States, the trip has just begun, and **it really is like that.**” – China
- “I love that they use different types of people; it implies that the **opportunity to travel is for everyone.** I love the natural images they're showing me; they make me want to go. ... it literally invites you to travel anywhere you want. Everything is relevant and positive.” – Mexico
- “I liked the images related to the **diversity of the places**, the message that really stood out and was appealing, vibrant colors. Yes, the words were “go with your heart.” I think the images are extremely important because it shows what the USA is like and what we can enjoy there.” – Brazil
- “I liked the phrases used, mind, heart etc., which gives an impression that there are a lot of things to do in **all the areas of your interest.** It gives a feeling that there are options for all kinds of people” – India
- “[It means] That **you'll have an adventure**, that a trip in the USA is exciting, that you'll get to know awesome people, that it's unique.” - Germany



Phase 2: Copy Refinement Methodology

- Online survey fielded by ORC
- 11 markets (CA, MX, BR, UK, DE, FR, IN, CN, JP, KR, AU)
- 1,000 respondents per market
- Image based ad testing

English-Speaking Market Results



FY2017: The 3Ps

POSSIBILITY



Build on an own-able foundation

PERSONA



Create relevance by targeting trip motivations and inspirations

PROXIMITY



Make it real with travel itineraries and trip suggestions

The 3Ps have been built into the fabric of our new site, new campaign and new content approach to deliver...

PARTNER
VALUE



Modular formats across platforms showcase unique destination and partner stories

GENUINE &
AUTHENTIC
EXPERIENCES



Focus on relatable experiences, destinations and itineraries for each market and trip persona

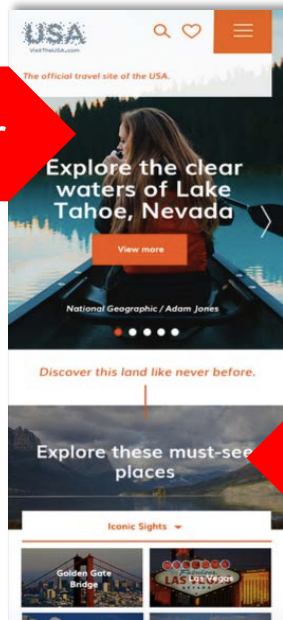
SOCIAL FIRST
STORYTELLING



Visually arresting/"thumb stopping" storytelling that is inherently sharable

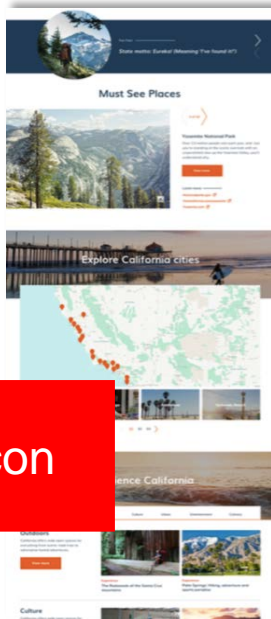
VisitTheUSA.com

Home &
Campaign



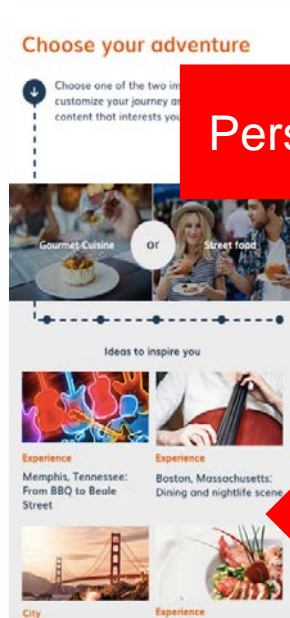
Modular

State, City, Trip,
Experience & Destination



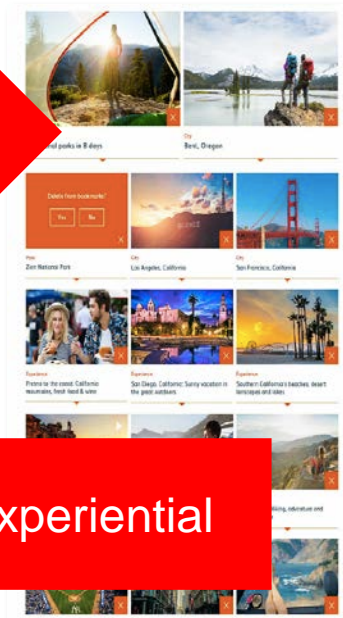
Icon

Personalization



Personal

Bookmarks &
Sharing



Experiential

Note: Creative Directional Only. Not Final.

USA Campaign

CREATIVE FOR CONCEPT PURPOSES ONLY

Modular

Experiential

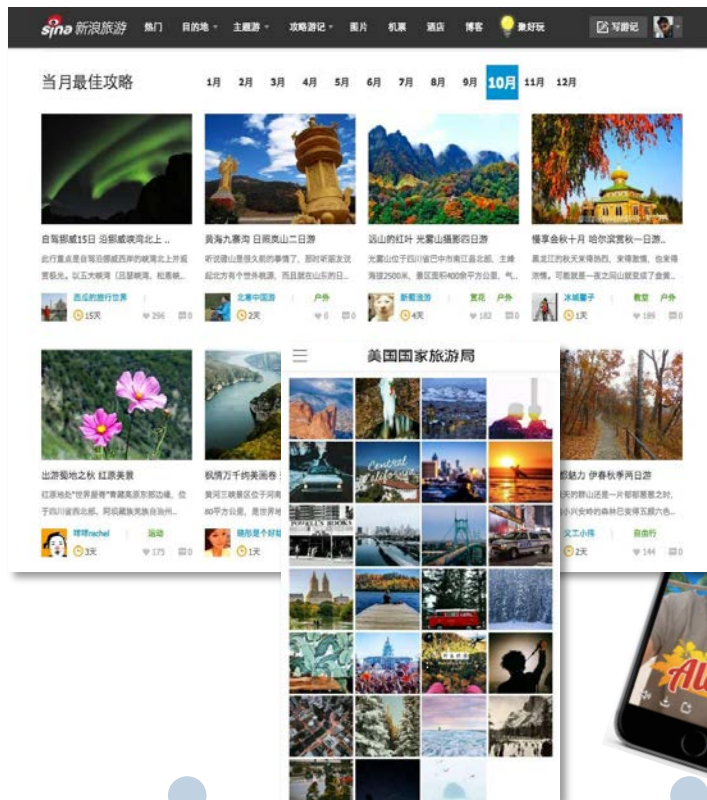
Icon



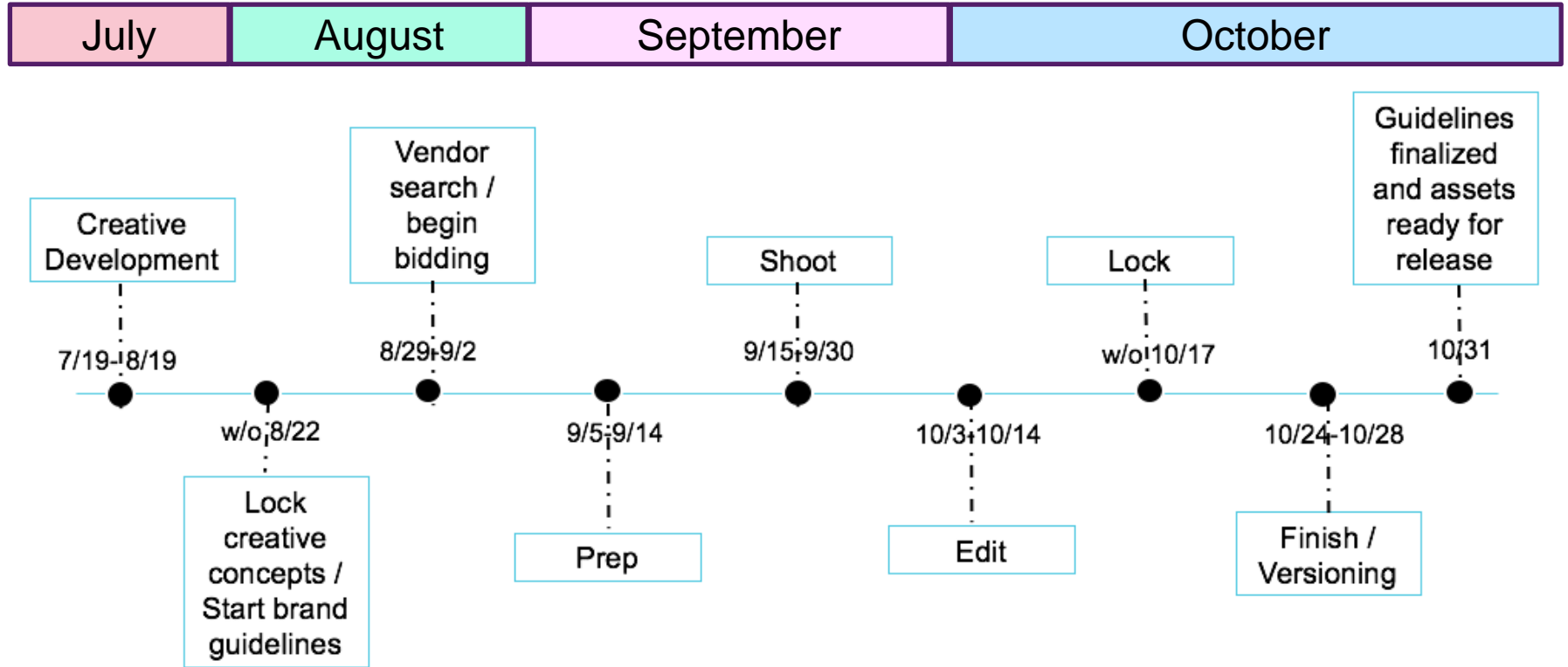
Customized suites of assets for each trip persona provide maximum relevance.

Note: Creative Directional Only. Not Final.

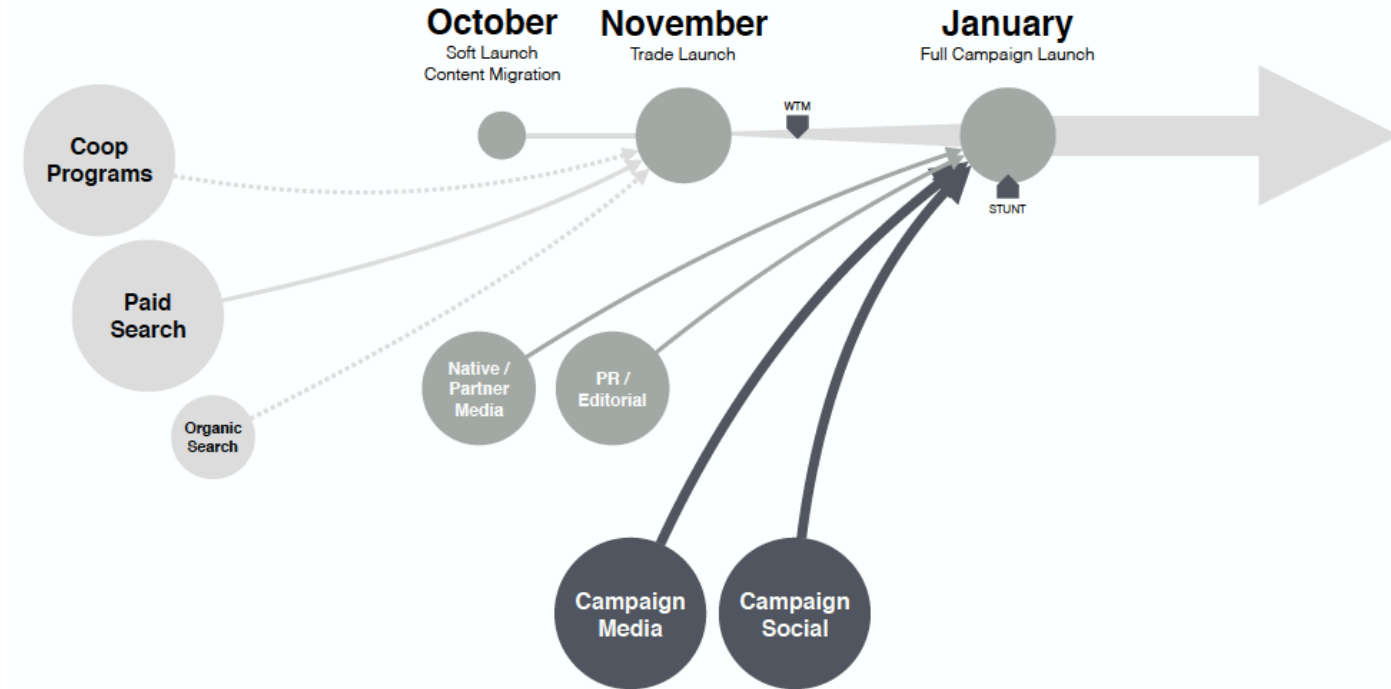
Sharable Storytelling



Production Calendar



Launch Calendar Overview





Item 4: International Representation Strategy and RFPs

International Offices



International Offices

- **Australia and New Zealand**
 - Gate 7
- **China**
 - AVIAREPS
- **Hong Kong, Taiwan, and Singapore**
 - Brandstory
- **Japan**
 - AVIAREPS
- **South Korea**
 - AVIAREPS
- **India**
 - Sartha Marketing
- **Canada**
 - Pulse Communications
- **Mexico and Central America**
 - Adnova
- **Brazil**
 - Ogilvy
- **United Kingdom and Ireland**
 - Black Diamond
- **Germany, Austria, and Switzerland**
 - Brandmasters



Process to RFP All Representation Offices

- RFP international representation agencies every three years
- Current Status
 - Extended all representation contracts through 2017
 - Will RFP all representation agencies in 2017
 - RFP process to be completed by 2018

FY2017 Top-line Objectives

- Focus on the China and Mexico markets
- Begin further implementation of trade activities in Netherlands, Italy, and France
- Focus on new product development
- Continue great work with Visit USA Committees
- Continue work on development of training tools, sales tools and travel professional section of consumer website



Item 5: Year-End Partner Contributions Report

USA

VisitTheUSA.com

Brand USA

Path to \$100 Million in Annual Contributions

Cash Goal
\$52,000,000

In-kind Goal
\$50,000,000

Partner Contributions

More than 600 partners have participated with Brand USA since inception

Cash Contributors 2016

- 16 of 236 partners contributed \$1 million or more in cash
 - Average contribution of these 16 partners: \$2.01 million
- 20 of 236 partners contributed \$500,000 - \$1 million in cash

In-kind Contributors 2016

- 11 of 36 media partners contributed \$1 million or more of media
 - Average contribution of these 11 partners: \$3.5 million



Item 6: *NATIONAL PARKS ADVENTURE* Giant Screen Film Update

Thomas Garzilli – Chief Marketing Officer

USA

VisitTheUSA.com

Brand USA

Countries Showing the Film

- United States
- Australia
- Brazil
- Canada
- China (coming soon)
- Denmark
- France
- Germany
- Hong Kong
- India
- Japan
- Mexico
- Netherlands
- Russia (coming soon)
- South Korea (coming soon)
- Spain (coming soon)
- Sweden
- Switzerland
- Taiwan
- United Kingdom

National Parks Adventure: Film Review

- More than **2.4 million people in 98 markets worldwide** bought film tickets within the first 6 months, including 500,000 movie-goers in 38 international markets.
 - Film generates a marketing value of \$10.72 for each international consumer viewing the film (source: Wasserman/Geometry combined analysis).
 - To date, we estimate an advertising value of nearly \$5.5 million (based on an audience of 500,000).
 - Our long-term projections for total audience far exceed our initial estimate of 4 million viewers generating more than \$44 million of advertising value.
- **Highest-grossing documentary film of 2016** so far (including both giant-screen and Hollywood documentaries) with an estimated **\$16.8 million in gross worldwide ticket sales** through August 31.
- The film's release is the **industry's fastest giant-screen roll-out in at least 5 years**, with 48 exhibitions in 6 countries in February, and 100 exhibitions in 12 countries within the first 6 months.
- The 2-minute **theatrical trailer** was seen by an estimated **15.4 million people** in **international markets**.

National Parks Adventure: Film Review

- Impact of *National Parks Adventure* on movie-goers' interest in visiting the USA
 - **81% are much more likely or somewhat more likely to visit the USA** as a result of watching the film
 - **62% are more likely to visit the USA instead of another destination** as a result of watching the film
- Additional Reach:
 - To date, the film's PR campaign has garnered **more than 4,000 pieces of earned media**, with more than **6.4 billion impressions**.
 - Local marketing and advertising efforts by exhibitors and film partners resulted in more than **1 billion additional media impressions worldwide**.

America's Treasures (working title)

- Flagship platform of new global strategy around Pop Culture
- Using the universal language of music as a common thread, *America's Treasures* will explore various cultural centers around the USA through the lenses of some of their biggest musical stars
- World Premiere: February 2018



Discussion and Q & A



Closing Remarks and Adjourn Meeting

USA

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Brand USA



Thank you for Attending the September 15, 2016
Marketing Committee Meeting

USA

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Thank you for joining us

Travel Industry **TheBrandUSA.com**



Twitter: @BrandUSA



YouTube: YouTube.com/BrandUSAtv



LinkedIn: LinkedIn.com/Company/BrandUSA

Consumer **VisitTheUSA.com**



Twitter: @VisitTheUSA



Facebook: Facebook.com/VisitTheUSA



YouTube: YouTube.com/VisitTheUSA



Instagram: VisitTheUSA



Google+ Google.com/VisitTheUSA

