

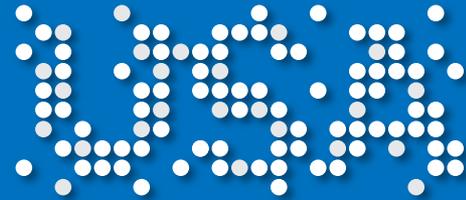
Brand USA Marketing Committee Presentation

September 17, 2014



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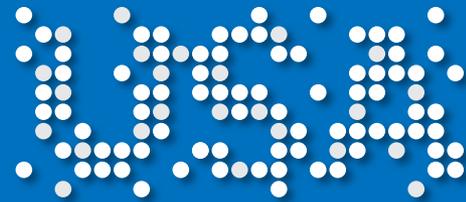
Barbara Richardson

Chair
Brand USA Marketing Committee



Agenda

- ◆ **Opening Remarks from Marketing Committee Chair, Barbara Richardson**
 - Call the Meeting to Order
 - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **FY14 Progress**
- ◆ **FY15 Strategies and Program Highlights**
- ◆ **Discussion**
- ◆ **FY15 Planning and Business Plan Update**
- ◆ **Questions/Answers**
- ◆ **Adjourn**



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Chris Thompson

President & CEO



FY14 Highlights

● Partnerships and Funding

- 438 partners and growing (up from 89 in 2012, 339 in 2014)
- Maximizing the match—bringing FY14 to a strong close

● Consumer Campaign

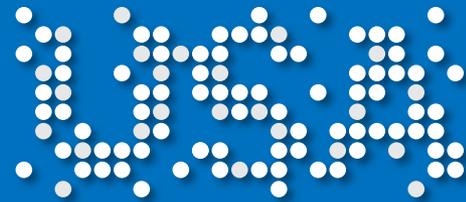
- Consumer campaign in 10 markets—expanding to 14 in FY15
- Digital and social footprint in 11 languages

● Programs and Platforms

- Research significantly expanded to include market profiles, competitive set analysis, predictive, and performance tracking
- 100 new co-op platforms with more than 200 opportunities (and growing)—with 85% directly targeting the consumer
- Global PR has more than doubled in reach

● Trade Outreach

- International representation in 20 markets—expanding to 25 in FY15
- USA pavilions at 24 international shows in FY14—increasing to 30 or more in FY15
- Doubling the total number of events, sales missions, road shows, and MegaFams in FY15
- Expanding online training platform to 5 additional markets in FY15



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Tom Garzilli

Senior Vice President
Global Partner Marketing
& Acting CMO



Strategies/Tactics



FY15 Strategies

- **Build and Distribute Dynamic Content**
 - Engage and inspire travelers through storytelling that emphasizes experience and provides a call to action/booking opportunities
 - Great Outdoors and Urban Excitement (with a focus on culinary)
 - Culinary, Retail, Ski/Golf, Cruising, Road Trips, Attractions, Hotels
- **Continue to Expand Market Presence**
 - Right Markets, Right Time
- **Build and Leverage Industry Collaboration**
 - Harness the collective force of our partners to drive demand

FY15 Strategies

- **Create Value**

- For Consumers- Building strong calls to action and booking opportunities
- For Stakeholders- Continue to optimize opportunities for marketing and global outreach

- **Market the Welcome**

- Work with our federal agency and destination partners to communicate ease of entry and enhance the welcoming experience

- **Drive Results**

- Make market-driven decisions and track results based on sound research and analytics in order to increase incremental, visitation, spend, and global market share

A photograph of the Golden Gate Bridge in San Francisco, California, taken during sunset. The bridge's towers and suspension cables are silhouetted against a warm, orange and yellow sky. The bridge spans across the water, with a sandy beach and waves in the foreground. The overall mood is serene and iconic.

**Be the USA's Primary
Storyteller and Inspirer to the World**



Great Outdoors 2015-16 Campaign

- The United States of Great Outdoors Content Hub and Social Platform- Fall 2014
- Giant Screen Film Launch September 2015
- Film premiere events for consumer and trade summer/fall 2015
- Multi-channel consumer and trade advertising throughout 2015
- Media spin-offs – TV series with Travel Channel summer/fall 2015



Discover America.com Explore Places Plan

THE UNITED STATES OF
Great Outdoors
BETA

EXPLORE U.S. National Parks ABOUT The Movie

STORIES BY Interest DESTINATION

BEHIND THE SCENES
Our "Wild" Film in the Grand Canyon

Wildlife: The 15 Most Adorable Animals in U. S. Parks

Adventures: One Brazil Blogger's Hunt for Terrifying Adventure

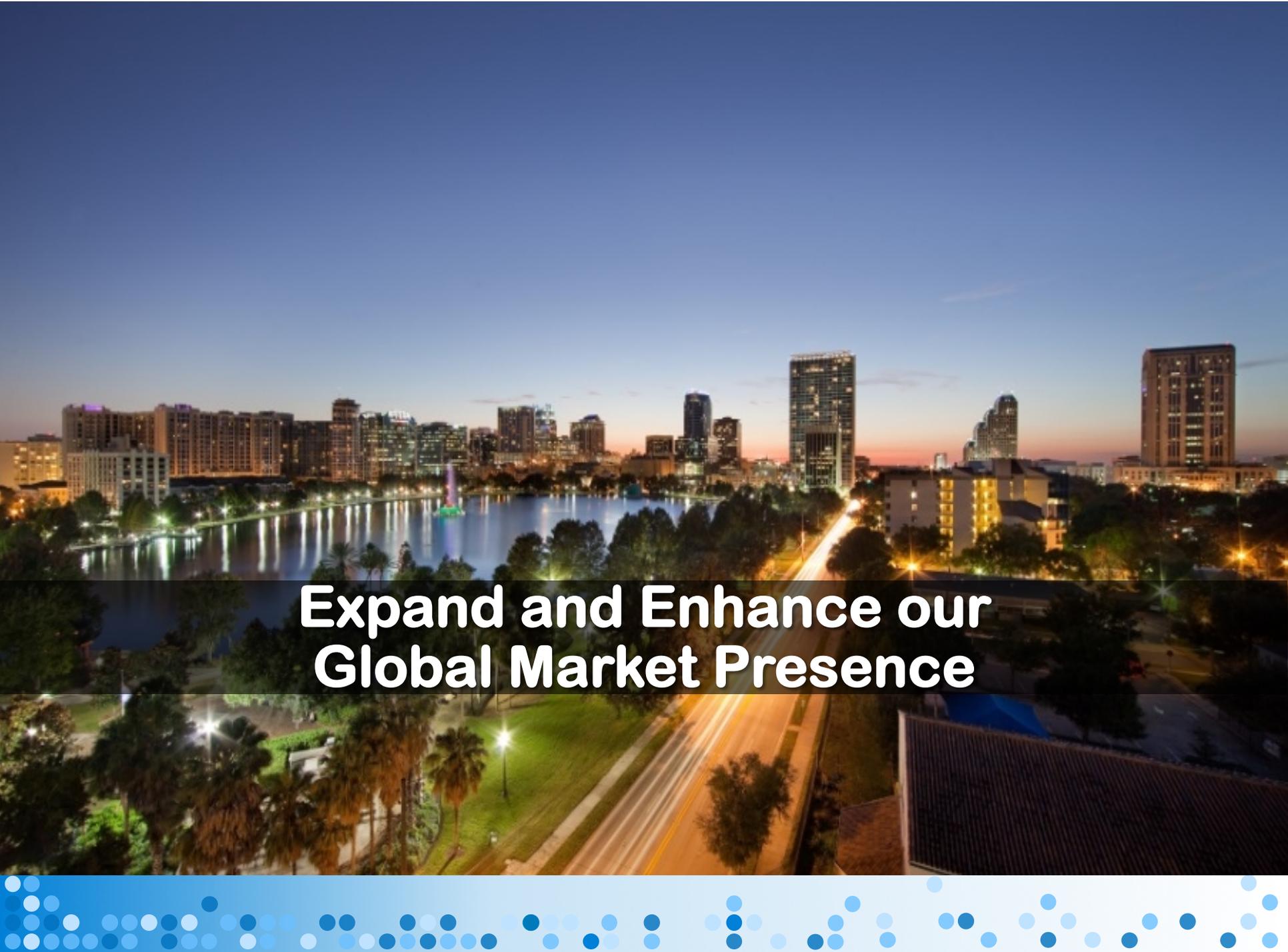
Nature: Which U.S. Park is Home to 50 Types of Butterflies?

Adventures: How Ben Ford Cooks the Perfect Park Feast

How to Get There: On the Rails: National Park You Can Reach By Train

GREAT OUTDOORS HUB

- National Parks
- Recreation
- Beaches and Coasts
- Zoos and Aquariums-Attractions
- Camping and Fishing
- Golf
- Skining
- Gardens and Arboreturns
- Scenic Byways

A nighttime photograph of a city skyline across a body of water. The sky is a deep blue, and the city lights are reflected in the water. In the foreground, there are palm trees and a road with light trails from cars. A semi-transparent black banner is overlaid across the middle of the image, containing white text.

**Expand and Enhance our
Global Market Presence**

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



International Representation Expanding to 25 Markets



Adnova

Brandmasters

Connect Worldwide

Ogilvy PR

Pulse Communications

Aviareps

Black Diamond

Gate 7

Sartha Marketing

Expansion Markets

Marketing Initiatives in 33 markets – combination of consumer campaign, co-op, or trade reaching more than 90% of inbound travel to the USA



Agency RFPs in Process

Global Advertising Agency of Record

Digital Development Agency

Social Community Management Agency

Digital Buying Agency

Digital Asset Management System





Industry Collaboration and Value Creation



Brand USA

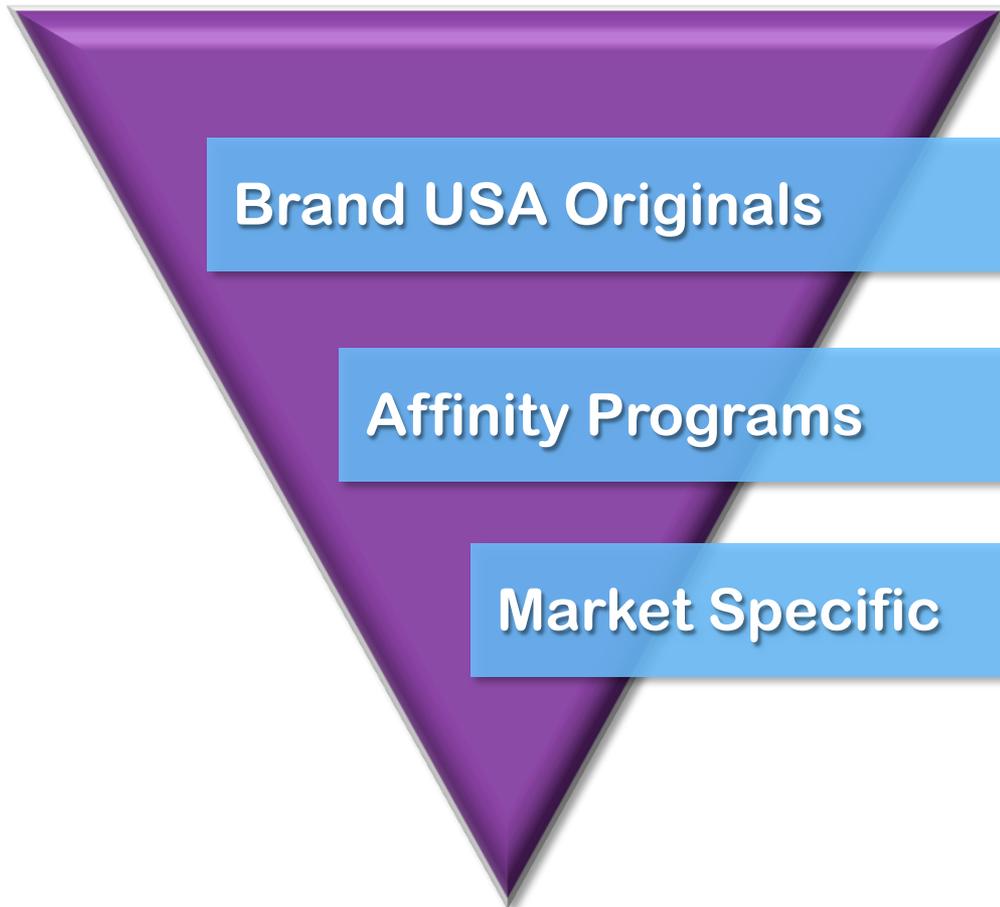
Industry Roundtables

- Provide Feedback, Insight and Strategic Direction
- Bi- Annual Meetings- January and at IPW
- 15 Members Each, based on Established Criteria
- Diverse Representation across Industry Segments
 - CMO Roundtable
 - Partner Programs Roundtable
 - Market Development Roundtable



Three Paths to Value

- **Deliver compelling content and valuable activation**
- **Leverage scale for efficiency**
- **Foster partnership and collaboration**
- **Create unique opportunities**



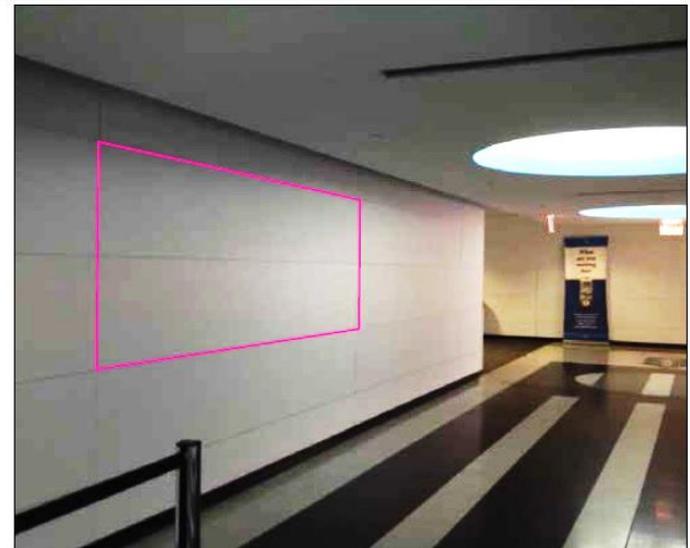
A photograph of the Statue of Liberty on Liberty Island, New York. The statue is green and stands on a stone pedestal. The sky is clear blue. In the foreground, there is a body of water and a crowd of people on the island. A semi-transparent dark grey banner is overlaid across the middle of the image, containing the text "Marketing the Welcome".

Marketing the Welcome

Market the Welcome

Trade Shows, Embassies, Arrival Halls

- **Enhanced Trade Show Strategy**
 - Upgraded booths, partner presentation, touch screens and video
- **Arrival Hall Package for Airports, Embassies, and Destinations**
 - Out of Home Elements
 - Marketing and Entry Process Materials
 - Video Components distributed via:
 - International arrival halls
 - Partner websites and airport websites
 - Embassy websites; ESTA website; other Federal websites abroad
 - Consular areas of embassies
 - In-flight video
 - DiscoverAmerica.com and thebrandusa.com





Drive Results



Research & Analytics: Ongoing Activities

Performance Metrics

- Annual ROI study
- Campaign results, website/social reporting

Market and Media Prioritization

- Using projections and trend analysis to support budget allocation

Market Intelligence

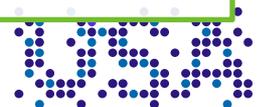
- Primary consumer studies in 12 markets
- Analysis of acquired data and intelligence (TDM from Tourism Economics, Comscore, MIDT, etc.)

Ad and creative testing

- Post wave campaigns
- Ongoing creative testing

Partner Satisfaction and Intelligence

- Partner surveys and roundtable meetings





Brand USA

Brand USA: A Powerful Force in U.S. Economic Growth

Inspiring and influencing international travel to the United States.

Brand USA, the nation's destination marketing organization, delivered powerful results in fiscal year 2013. According to a study by Oxford Economics, Brand USA's initiatives in eight markets where it had fully deployed consumer, trade, and co-op marketing campaigns, contributed to a stronger more dynamic U.S. economy.

1.1 million visitors

\$3.4 billion in visitor spending



total impact on economy
\$7.4 billion

47:1

For every \$1 spent Brand USA generated \$47 for U.S. companies

53,181 new jobs supported

U.S. taxpayers pay **\$0** to fund Brand USA's marketing efforts

Sources: Oxford Economics, National Travel and Tourism Office, Bureau of Economic Analysis, Advance Passenger Information System. Download the full report: www.thebrandusa.com

An independent study conducted by Oxford Economics quantified the measurable benefits Brand USA delivered to the U.S. economy in its 2013 fiscal year ended September 30, 2013. **#BrandUSA**

* Australia, Brazil, Canada, Germany, Japan, Mexico, South Korea, United Kingdom

Research & Analytics: Special Projects

Project Phoenix

Dreamcatcher



Consumer focus groups on perceptions of the USA and the DMO value proposition

Explorer



Quantitative study focused on guiding website development

Narrator



Creative development workshops

Strong and Growing Consumer Engagement

Facebook



Facebook Engagement
(Avg Monthly)



YouTube



China Social



DA Page Views
(Avg Monthly)



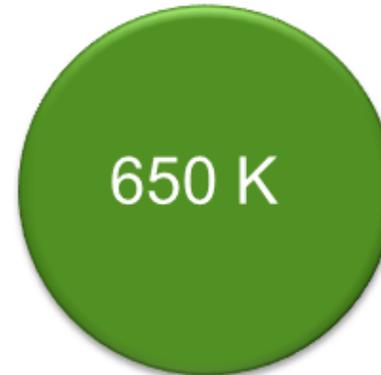
DA Website Visits
(Avg Monthly)

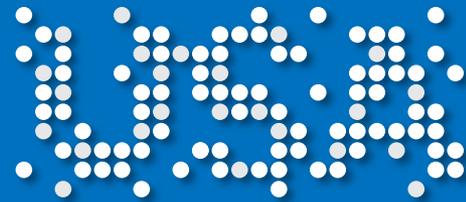


GoUSA Page Views
(Avg Monthly)



GoUSA Visits
(Avg Monthly)





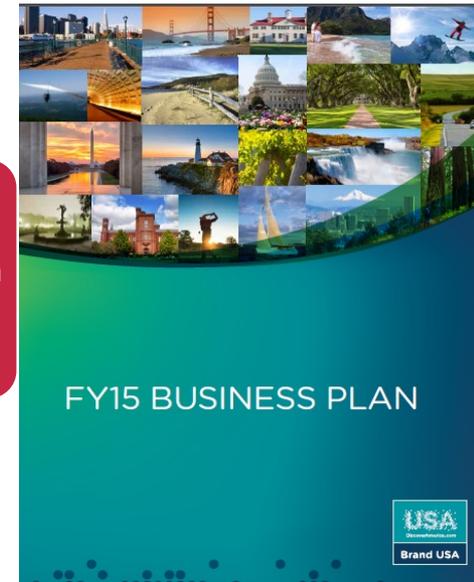
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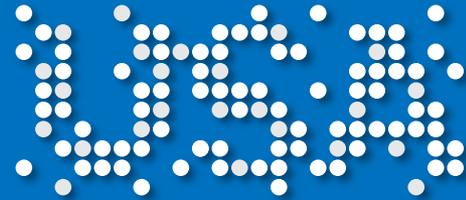
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FY 15 Marketing Planning Cycle





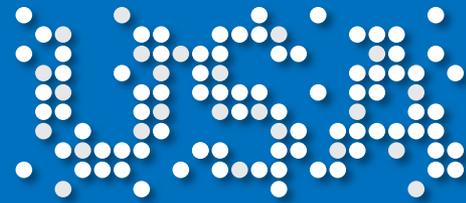
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Questions and Discussion



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Thank You!

Travel Industry Information

@BrandUSA on Twitter
TheBrandUSA.com

Consumer Information

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DiscoverAmerica.com