



# Brand USA

# Q1 FY2018 MARKETING COMMITTEE MEETING

November 14, 2017







# OPENING REMARKS

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A scenic view of the Washington Monument in Washington, D.C., framed by pink cherry blossom branches in the foreground. The monument is reflected in the water of the Tidal Basin. A purple banner is overlaid on the left side of the image.

# APPROVAL OF MINUTES

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# CMO REPORT

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# Major Milestones

- **Revenue/Development:**
  - \$637 million in contributions since 2012
  - 7<sup>th</sup> consecutive year of earning 100% of matching contributions
  - Highest average contribution per partner in FY2017: \$670k per contributing partner
  - Maintained 90+% Partner Retention
- **Innovative Marketing**
  - National Parks Adventure and America's Musical Journey giant-screen films
  - New and exciting programs (e.g., BBC, Go USA TV)
  - Expanding and enhancing global trade and international representation



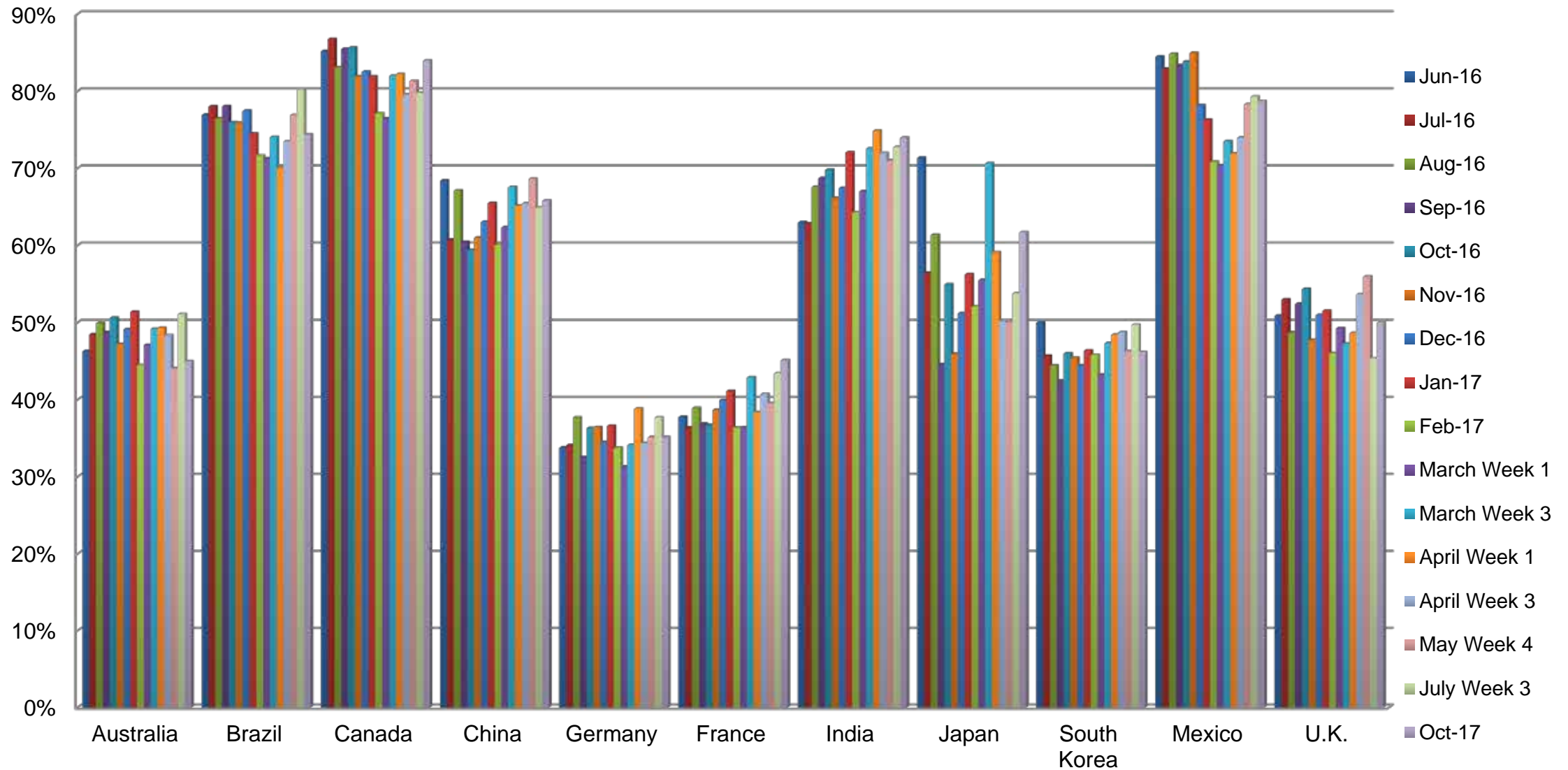
# RESEARCH UPDATE

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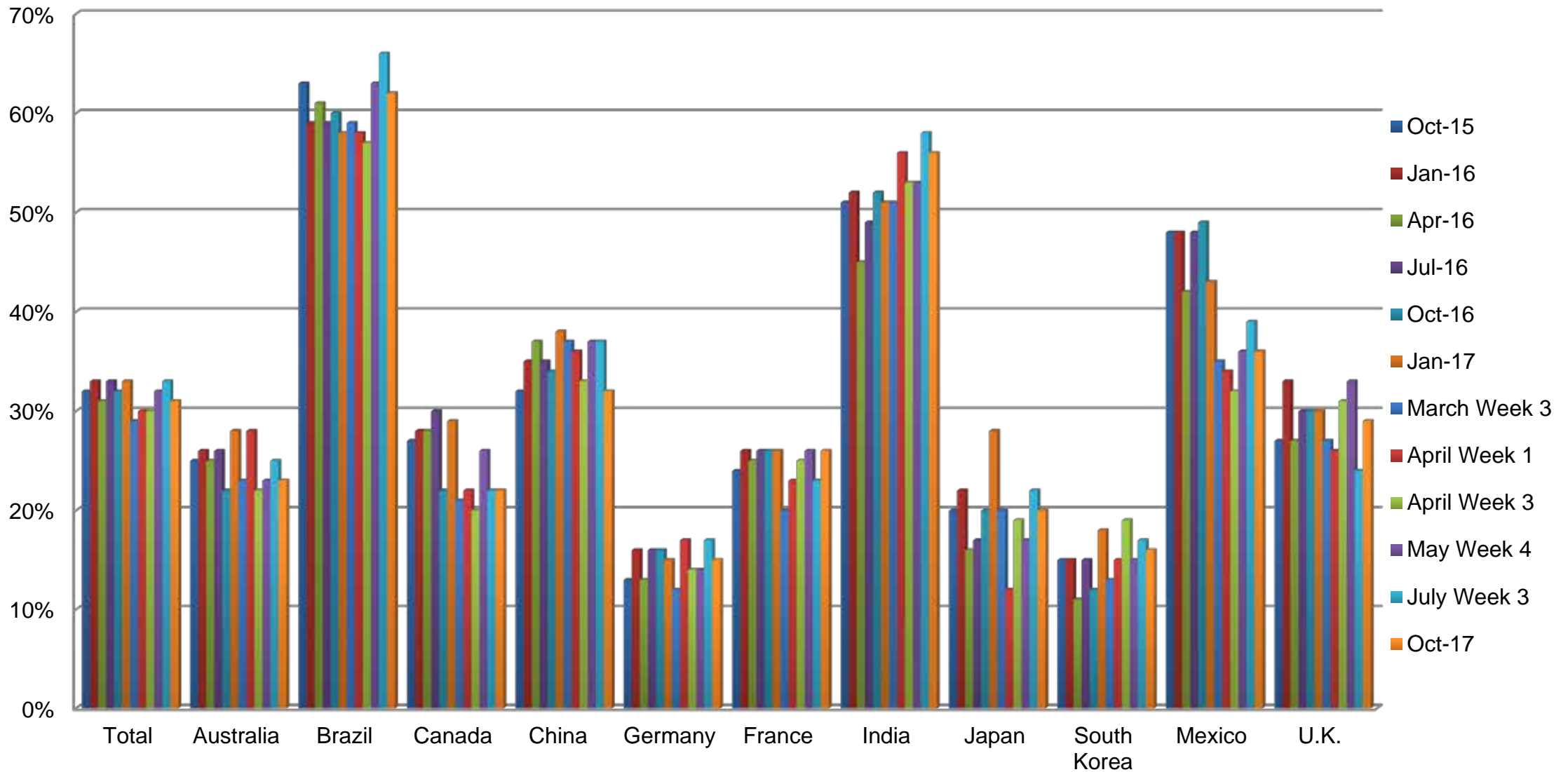


# Likely to Visit the USA in the Next Two Years



Source: ORC custom study

# Net Promoter Would Likely Bring Up the USA as a Destination to Visit



Source: ORC custom study





# GLOBAL TRADE DEVELOPMENT UPDATE



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# Global Trade Update

- **October 2017**

- § India Sales Mission
- § Germany MegaFam
- § India MegaFam
- § ITB Asia
- § USA Discovery Program

- **November 2017**

- § European Representation
- § World Travel Market

- **December 2017**

- § Travel Trade Website Launch





# International Representation RFP Update

## Completed and Contracted

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

## Selecting and Negotiating Contracts

- § Mexico
- § Canada
- § Italy, Spain
- § Germany, Austria, Switzerland
- § France, Benelux

## In Process

- § China
- § South Korea
- § Japan
- § Hong Kong
- § Taiwan
- § Singapore







# PARTNER PROGRAMS UPDATE

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# Culinary Initiative 2017



## Olly Ale Trails

- Featured Destinations:
  - § Arizona
  - § Oregon
  - § Colorado & Denver
  - § Texas, Houston & Austin
  - § San Diego
- Season 1 Highlights
  - § All airings + promotion had a combined reach of 15.8 million travelers (episodes alone reached 1.1 million travelers)
- Season 2 - Premieres 11/6 (UK) and 11/27 (EMEA)
  - § Each partner destination being promoted in 210 30-second commercial spots
  - § Airing in 50 countries

## Culinary Vignettes

- Created vignettes promoting 25 states and U.S. Virgin Islands
- Aired internationally on Travel Channel and Food Network
- 2,310 total added value re-airst in FY2017
- Reached 12.6 million international travelers







# BBC – USA Through Music

## 26 Featured Destinations

- **2017 – Music**

- § Los Angeles, CA
- § Memphis, TN
- § Detroit, MI
- § Charleston, SC
- § Wyoming

Flight dates: Sept- Nov '17; Jan- Mar '18

- 2,611 TV spots – regional feeds
- 22MM digital impressions global
- Translated in 8 languages

- **2016 – Great Outdoors**

- § Sedona, AZ
- § Encinitas, CA
- § San Francisco, CA
- § Cumming, GA
- § Oahu, HI
- § Wetlands, LA
- § Marine on St. Croix, MN
- § Bozeman, MT
- § White Mountain National Forest, NH
- § Hudson River Valley, NY
- § Willamette Valley, OR
- § South Padre Island, TX

- **2015 – Film**

- § Utah
- § Virginia
- § Chicago, IL
- § Miami, FL
- § New York City, NY
- § Philadelphia, PA
- § Seattle, WA
- § Los Angeles, CA
- § Atlanta, GA



# Fliggy Single's Day 11.11

- Fliggy = OTA arm of Alibaba Group in China
- Single's Day = Largest ecommerce event on the planet
  - § Larger than Black Friday and Cyber Monday combined
- In 2017, Alibaba Group accrued \$25.3 billion in sales in 24 hours
- In 2016, Fliggy hit a new record for total sales on 11.11, reaching over **\$316 million** in sales
- In 2017, Brand USA partnered with Fliggy to assure that the USA was the featured global destination





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, stretching across the blue waters of the bay. In the background, the San Francisco city skyline is visible under a hazy, overcast sky. On the right side of the frame, the back of a person's head and shoulder are visible, suggesting they are looking out at the bridge. A semi-transparent purple banner is overlaid across the middle of the image.

# Integrated Marketing Update

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# One Big Welcome



With over 3000 assets submitted from a wide variety of destinations, we are thrilled with the industry response to the One Big Welcome initiative.

From home-towners to restaurateurs to governors, the stories our DMO and CVB partners shared are personal, diverse and truly show the warmth of the American people.

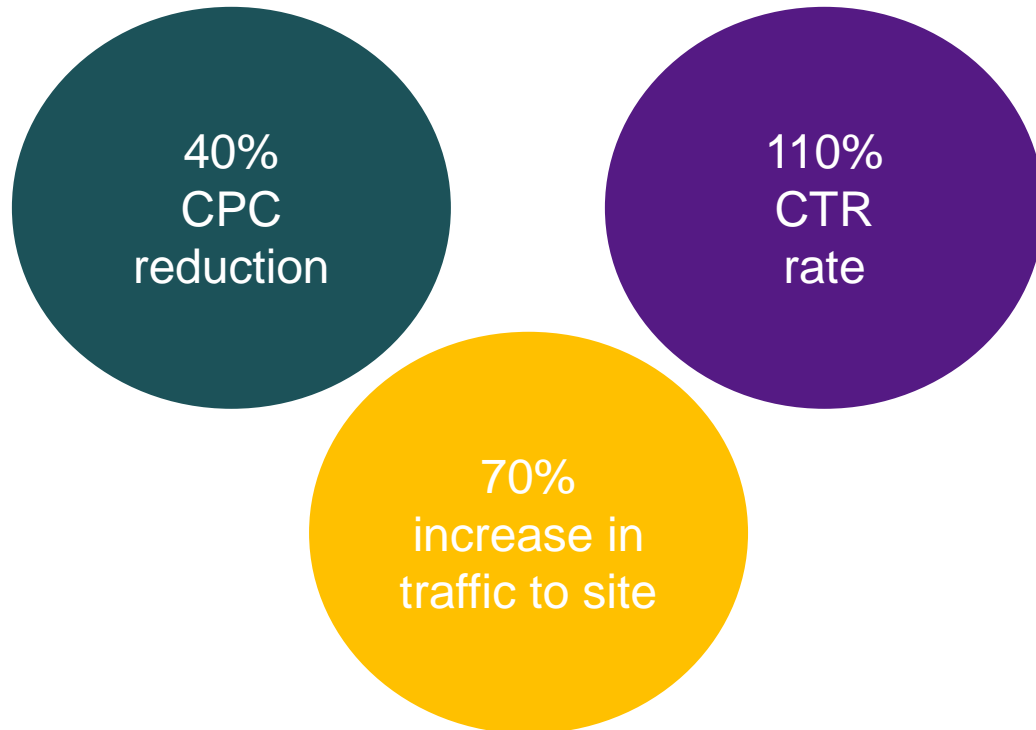
Assets will be featured in paid, earned and owned media beginning in January/February 2018.





# Improved Search & Site Performance

## Improved SEM



**Higher Engagement Without Sacrificing Volume**

## Industry Recognition



### *Travel Weekly Magellan Awards*

- **Gold: Overall Destination / Family Destination**
- **Gold: Overall Destination / Adventure Destination**

### **Web Marketing Awards**

- **Outstanding Achievement: Best General Interest Site**





# Experience is Everything

**Brand USA focuses on storytelling** because we know the best way to move people...both literally and emotionally...is by showcasing the exceptional, diverse, and—most important—authentic experiences found in our destinations.

Experiences that allow people to escape, to find the unique, or to adventure.

**We reach consumers at every level of the tourism cycle.**

From dreaming to consideration to booking to traveling and sharing their experiences with others.

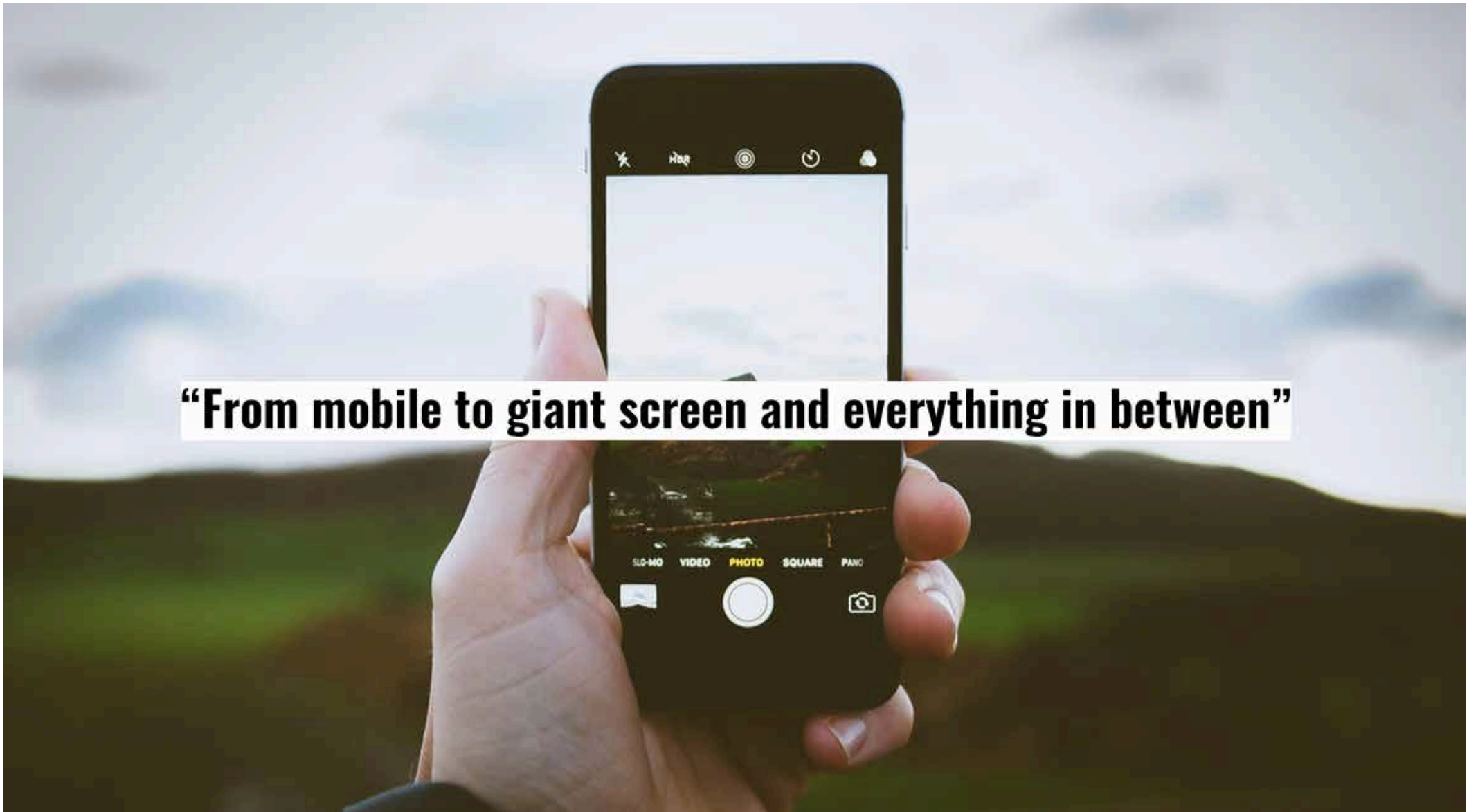
**But it all starts with inspiration...**



# 2018 Screen Strategy



**“From mobile to giant screen and everything in between”**





# 2018 Screen Strategy



While screens aren't mutually exclusive to a single moment in a traveler's purchase decision journey, we can develop overarching approaches to each, based on channel best practices.

Starting from a single-minded and specific POV in each of our channels allows us to develop a clear, creative approach to storytelling in each of our channels.

While we need to eventually tailor our messaging and creative to specific travel moments, having a single-minded approach by screen will ensure consistency across our communications.

# 2018 Screen Strategy



## Mobile

Thumbstopping, snackable content  
(inspiration-centric)



## Desktop

Serve as the portal to active trip  
planning with multimedia supported  
videos  
(information- and itinerary-centric)



## TV

Use as the hub to store and organize  
our owned longer form content and  
licensed or sponsored content giving  
travelers lots of different thematic  
avenues to lose themselves in



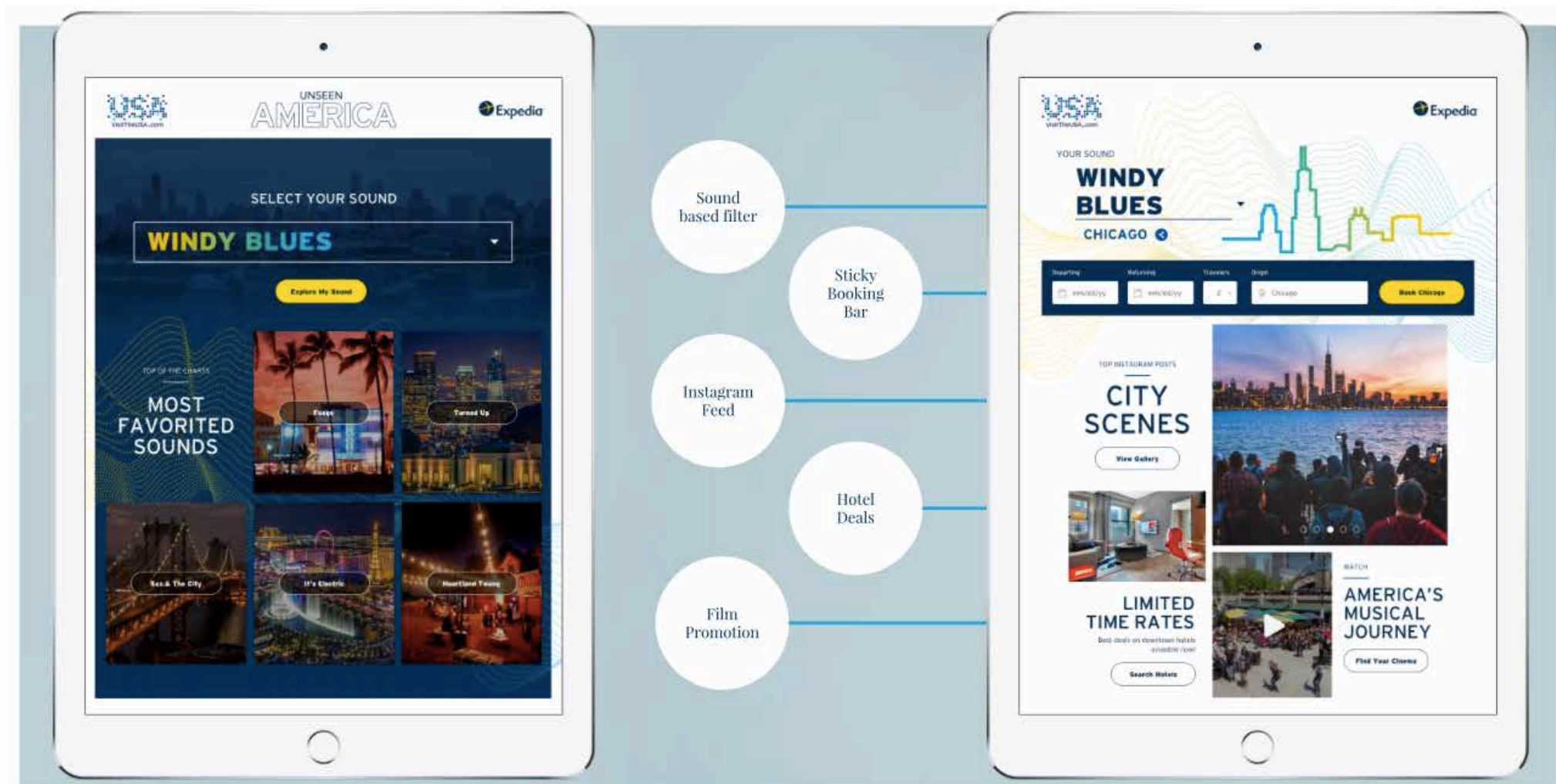
## Giant Screen

Immerse audiences in longer-form  
"mini movies" that thematically  
connect back to the feature  
presentation (storytelling-centric)

And we'll deploy this screen and content strategy  
in the combination that best fits the local market and opportunity



# Mobile: Co-Branded Initiative w/Expedia



Creative not final.  
Directional only.

# Smart TV: International Network

Smart TV is a television set with integrated Internet and interactive "Web 2.0" features.

In November 2017, Brand USA will launch a connected TV app called “Go USA” on Apple TV, Roku and Amazon Fire.

Goal? Destination TV!



Creative not final.  
Directional only.



Go USA TV



**Creative not final.  
Directional only.**



# MOVIE PRODUCTION UPDATE

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# Giant-Screen Films



**Our Most Effective, Most Immersive, Most Enduring, and Highest-Value Marketing Platform**



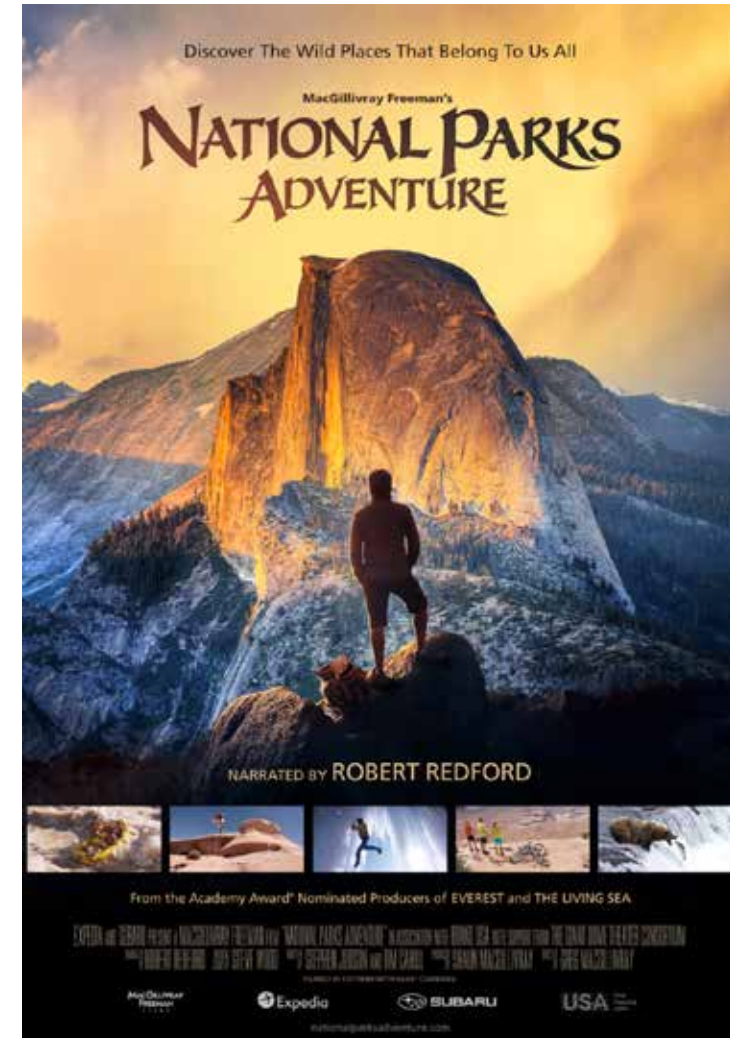
- **Most credible brand value platform**
- **Touches all aspects of our strategic foundational elements**
  - Create Innovative Marketing
  - Market the Welcome
  - Build & Maintain Trust
  - Add & Create Value
  - Drive Results
- **Inspires and drives visitation**

**And we own the entire asset and its components in perpetuity**

# National Parks Adventure: Two-year Review

**Globally, over 7 million people have watched the film (4 million in international markets)**

- The film trailer has generated over 100 million views
- China streaming launched June 2017, and has reached 1.2 million to date
- *National Parks Adventure* was the 2017 winner of the Brand Film Festival Award for Best Film by a Brand
- Highest grossing documentary of 2017
- Holds a 100% on Rotten Tomatoes/Tomatometer
- Inspiring and driving visitation—81% of viewers more likely to visit the USA
- Currently showing in 46 international cities
- Global launch on Netflix February 1, 2018





# National Parks Adventure: Two-year Review

## FILM/TRAILER INTERNATIONAL VIEWERSHIP AND MEDIA VALUE TO DATE

Medium	Value per View	2017 Viewership	2020 Viewership (Estimate)	2017 Media Value	2020 Media Value (Estimate)
In-Theatre Film	\$11.00	2,800,000	4,500,000	\$30,800,000	\$49,500,000
Trailer Advertising	\$0.28	55,000,000	100,000,000	\$15,400,000	\$28,000,000
Online Streaming Film	\$3.01	1,500,000	5,000,000	\$4,515,000	\$15,050,000
<b>TOTAL</b>		<b>59,300,000</b>	<b>109,500,000</b>	<b>\$50,715,000</b>	<b>\$92,550,000</b>

## IN-KIND MEDIA VALUE GENERATED

Source/Medium	Media Value
Expedia	\$5,000,000
Youku	\$1,600,000
Wanda	\$1,570,416
<b>TOTAL</b>	<b>\$8,170,416</b>

## MEDIA VALUE

	2017	2020 (ESTIMATED)
<b>TOTAL ADVERTISING MEDIA VALUE GENERATED</b>	<b>\$58,885,416</b>	<b>\$100,720,416</b>



# America's Musical Journey

**World Premiere in Washington, D.C. on February 15 & 16, 2018**

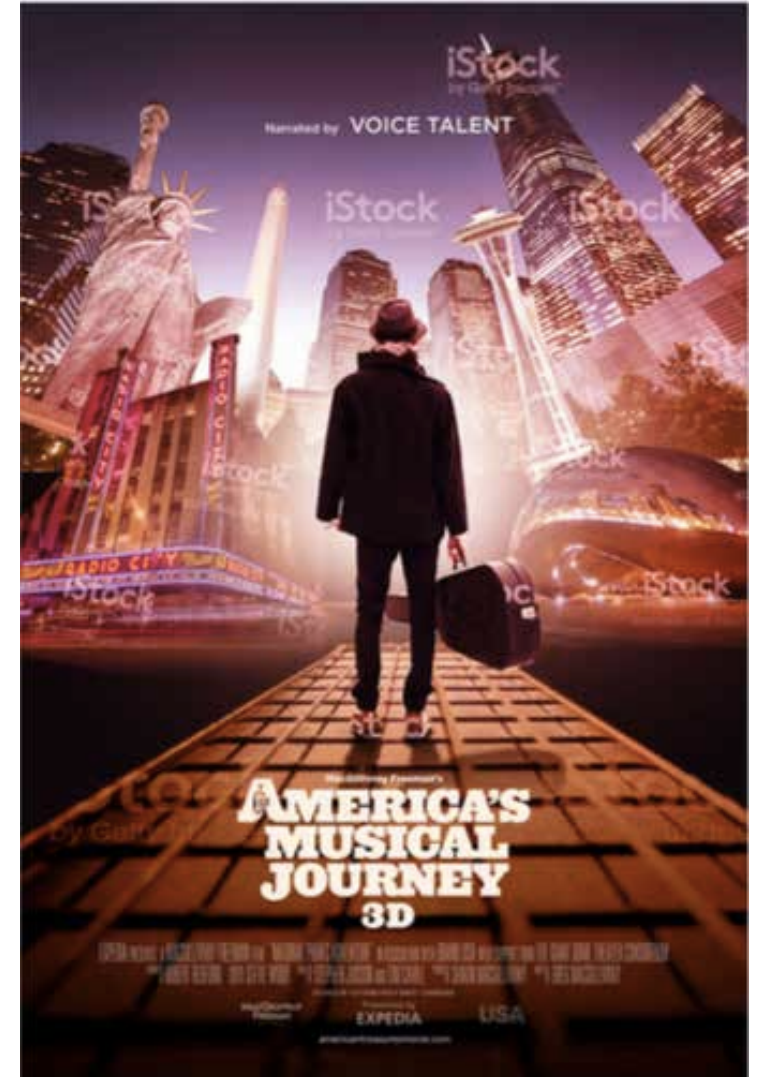
Global roll-out to follow in the months and weeks afterward with the majority of markets launching in the spring and summer.

- **Marketing Support Plans**

- § Launch at Sundance on January 20, 2018
- § Theatre co-op media to generate awareness for the film
- § Global consumer activations in London, Sydney, Beijing, Toronto and Mexico City
- § In market film premiere events in key cities around the world

- **Global Take Over Program**

- § In key Brand USA markets we will launch theatre takeovers once a week for 6-12 weeks
- § These will include important markets like Sydney, London, Berlin, São Paulo, Seoul among others that are currently not scheduled to receive distribution through traditional means (i.e., science centers and museums)







# QUESTIONS & ANSWERS

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A wide-angle photograph of the New York City skyline at sunset. The sky is a mix of purple, pink, and orange. Several skyscrapers are visible, including the Empire State Building on the left with its iconic Art Deco top, and One World Trade Center on the right, which is illuminated with a warm orange glow. Other buildings in the foreground and middle ground are also lit up, creating a vibrant cityscape.

# CLOSING REMARKS

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# Thank You

