

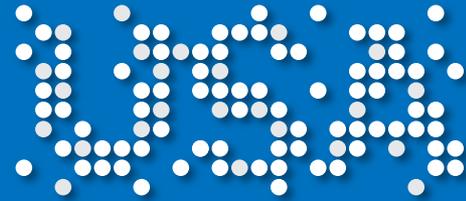
Marketing Committee Meeting

December 3, 2014



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Barbara Richardson

Chair

Brand USA Marketing Committee

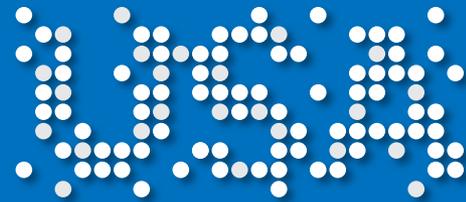
Agenda

- ◆ **Opening Remarks from Barbara Richardson, Marketing Committee Chair**
 - Barbara Richardson, Marketing Committee Chair
 - Call the Meeting to Order
 - Introductions: Management, Invited Guests, Legal Counsel

- ◆ **Brand USA Update from Chris Thompson, President & CEO**
 - Chris Thompson, President & CEO

- ◆ **FY14 Highlights and FY15 Strategies and Programs Update**
 - Tom Garzilli, SVP, Global Partner Marketing
 - FY14 Highlights
 - FY15 Strategies and Programs Update
 - Key Initiatives

- ◆ **Discussion**
- ◆ **Questions/Answers**
- ◆ **Adjourn**

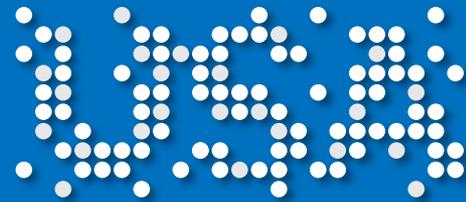


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Chris Thompson

President & CEO





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Tom Garzilli

Senior Vice President
Global Partner Marketing
& Acting CMO

FY14 Highlights

● Partnerships and Funding: **Strong and Growing**

- 475 partners through 2014 (up from 89 in 2012 and 339 in 2013)
- Maximizing the match—brought FY14 to a strong close with \$130 million in contributions and a 94% partner program retention rate

● Consumer Campaign: **Expanding**

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

● Trade Outreach: **Reaching Influential Travel Trade**

- 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

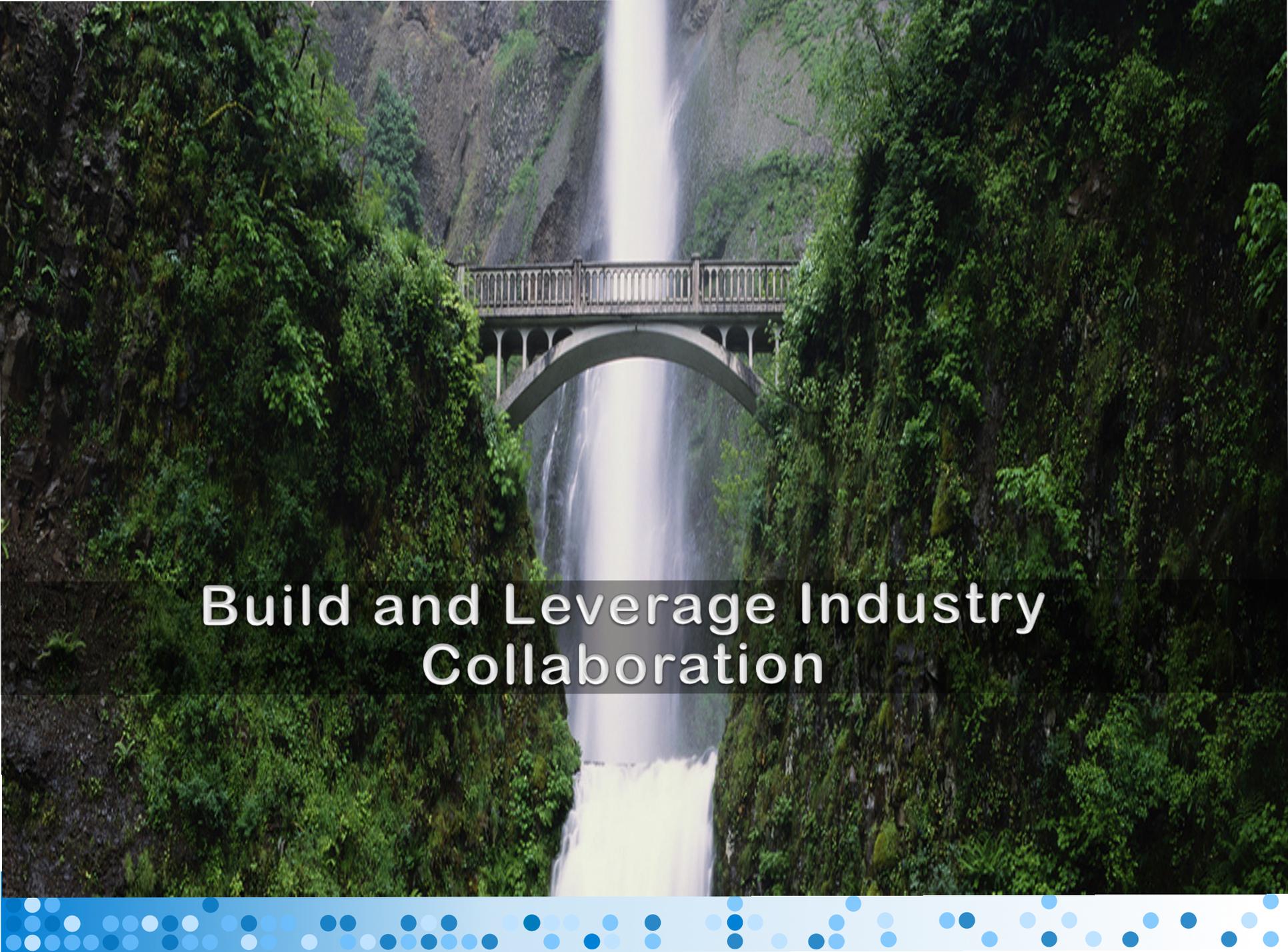
● Programs and Platforms: **Increasing and Delivering Value**

- 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



FY15 Strategies

- **Build and Leverage Industry Collaboration**
- **Continue to Expand Market Presence**
- **Build and Distribute Dynamic Content**
- **Create Value for Consumers and Stakeholders**
- **Market the Welcome**
- **Drive Results**



Build and Leverage Industry Collaboration

Build and Leverage Industry Collaboration

- FY15 Roadmap to \$100 million
 - GOAL: \$130,000,000
 - \$50 million cash
 - \$80 million in-kind
- As of today- \$40 million
- Increasing engagement of new and existing partners by optimizing partner programs...
- Allowing partners to increase reach and value

Build and Leverage Industry Collaboration

- Brand USA Global Marketing Summit
 - Annual event to be held in Washington, DC in January to kick off the new year.
 - First meetings: January 26-28, 2015
 - Featuring three Roundtables being seated for FY2015
 - CMO, Partner Programs and Global Market Development
 - Comprised of a representative group, based on a broad set of criteria established by our leadership and marketing teams
 - Save the Dates where sent to invitees on November 24
 - Second meetings at IPW in Orlando: May 30 - June 3, 2015

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. A road in the foreground shows light trails from traffic. The text "Continue to Expand Market Presence" is overlaid in white on a semi-transparent dark blue band.

Continue to Expand 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





Build and Distribute Dynamic Content



Build and Distribute Dynamic Content

- 2015-2016 – Launching of our Content Strategy
 - Content – created, curated, organic
 - Dynamic and Scalable
 - Measurable by real-time analytics and consumer feedback
 - Leading global media brands
- Two Platforms
 - Great Outdoors and Urban Excitement
- Channels
 - Giant-Screen Film
 - Television
 - Social/Digital
 - Print & OOH
 - Trade



The Great Outdoors



Great Outdoors 2015-16 Campaign

- The United States of Great Outdoors Content Hub and Social Platform- December 2014
- Giant-Screen Film Launch - fall 2015
- Film premiere events for consumer and trade- fall '15 and winter/ spring '16
- Multi-channel consumer and trade advertising throughout 2015

BEHIND THE SCENES
Our "Wild" Film in the Grand Canyon
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WILDLIFE
The 15 Most Adorable Animals in U. S. Parks
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ADVENTURES
One Brazil Blogger's Hunt for Terrifying Adventure
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NATURE
Which U.S. Park is Home to 50 Types of Butterflies?
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ADVENTURES
How Ben Ford Cooks the Perfect Park Feast
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HOW TO GET THERE
On the Rails: National Parks You Can Reach By Train
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INSPIRATION
Top 10 Things You Will Love About the Everglades
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Great Outdoors

2015-16 Campaign

- Media spin-offs –
TV series with Travel Channel
summer/fall 2015
- Digital/Social
 - Road Trips
 - Travel Like a Local





The Big Film –
Behind the Scenes Footage
Click here to view the video:
<http://youtu.be/gCS9uoAp6GI>

Urban Excitement



Urban Excitement

Great American Food Stories

- Award Winning Culinary Guide – Phase 2 with in-country promotions
- United States of....Content Hub + Social platform
- Multi-Channel marketing campaign in Canada, UK and Japan



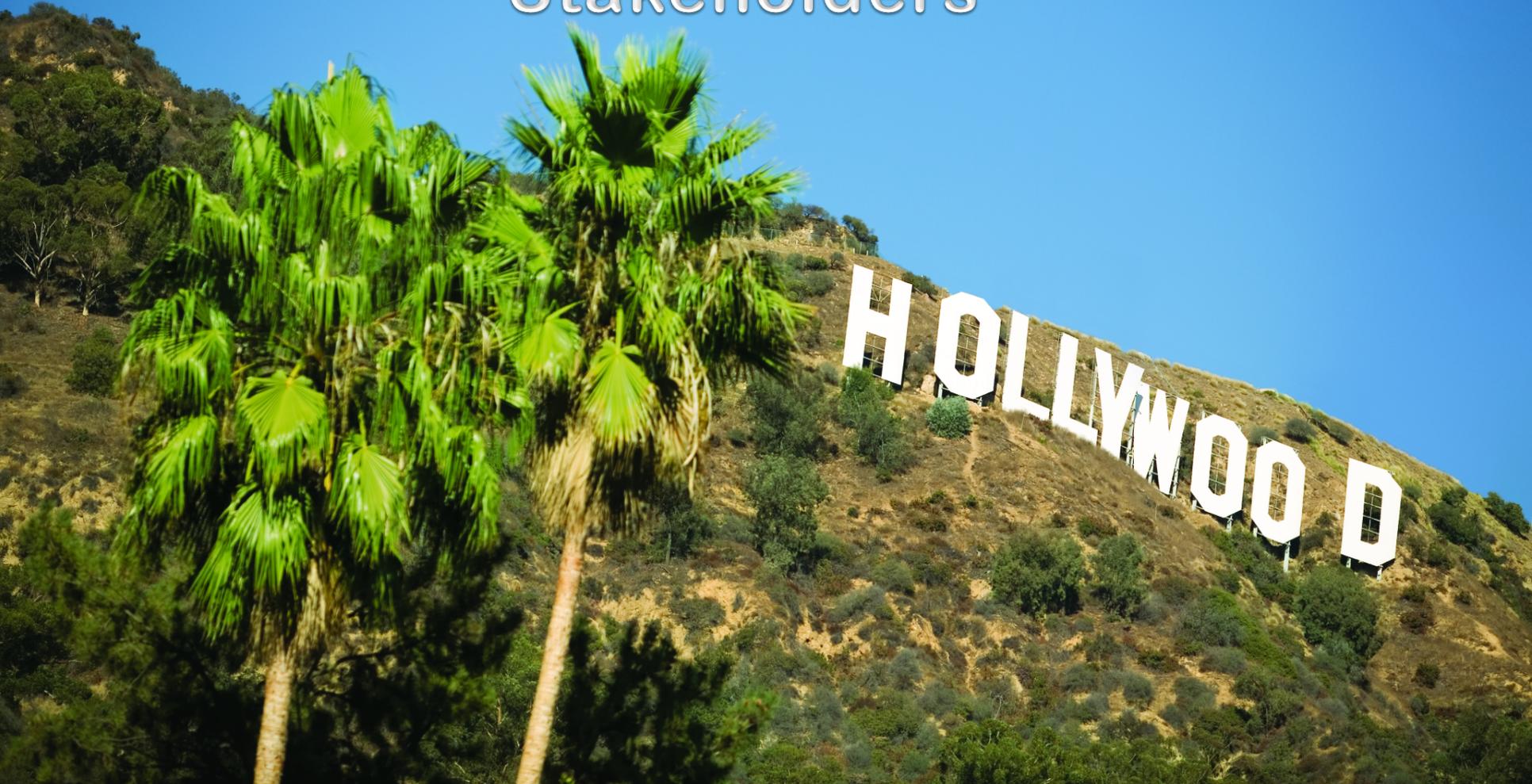
Urban Excitement

Great American Food Stories

- Expo Milano 2015: May 1-Oct 31, 30 million global travelers
- International Food Network – “30 Chefs, 30 Days” – 30 vignettes airs globally in July 2015
- Travel Channel – Jeni & Olly American Adventures- expanded episodes



Create Value for Consumers and Stakeholders



Create Value for Consumers and Stakeholders:

China

- Ten Year-Visa announcement
- Initiatives
 - China Leadership Summit
 - 2-Multi-Channel programs– print, digital and TV
 - Digital Programs on the leading sites- including Retail
 - Sub sites for Destination and Attraction Partners on GoUSA.cn
 - 100 In-language Videos
 - Specific pre-launch activities for film
 - Training – Launching USA Discovery program: spring 2015
 - Market Entry Program for our partners

Create Value for Consumers and Stakeholders: Q by Q Initiatives

- **Q2 Jan- Mar**
 - Great Outdoors Hub
 - BBC- The United States of America on Film
 - ESPN Sports Hub
 - CNN International
 - Advertising and Marketing Programs:
 - Australia, China, Germany, Canada,UK
 - Global Social Media Takeover

Create Value for Consumers and Stakeholders: Q by Q Initiatives

- **Q3 Apr- Jun**

- TV Programming
 - Jeni & Olly
- Road Trips (Social Media & National Geographic)
- Ongoing Social engagement- across all markets ongoing
- Culinary
 - Content Hub
 - Expo Milano
 - Culinary Guide
- Advertising and Marketing Programs:
 - Australia, Brazil, Canada, China, Germany, Japan, Mexico, UK

Create Value for Consumers and Stakeholders: Q by Q Initiatives

- **Q4 Jul- Sep**
 - Global Content Partnerships continue
 - Content Hubs
 - Expo Milano
 - Food Network- “30 Chefs” Vignettes
 - National Parks Television Series - Travel Channel
 - Giant-Screen Film Pre- Launch Activities
 - Advertising and Marketing Programs:
 - Brazil, Mexico, UK

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 gathered on the island. A semi-transparent dark grey banner is overlaid across the middle of the image, containing the text "Market the Welcome".

Market the Welcome

Market the Welcome

- **Communicating and Promoting U.S. Entry Process and Policy**

- Enhanced Travel Facilitation between China and the United States
- Industry Roundtables regarding Global Entry
- Updates to the ESTA Questionnaire
- Pre-clearance in the United Arab Emirates
- New TSA Electronic Screening Procedures
- Health Screening
- Chile's Admittance to the Visa Waiver Program

- **Welcoming and Thanking International Travelers**

- International Arrival Halls
- Toolkits, Marketing Materials and Redesigns in Consular Areas of U.S. Embassies

- **Webinar on China: Thursday, December 4 at 7pm EST**

- Presented by NTTO, U.S. Commercial Service, and Brand USA
- Information and Link to the Registration Page on www.export.gov can be found on TheBrandUSA.com

A vibrant rainbow arches over a desert landscape with iconic butte formations under a dramatic, cloudy sky. The scene is bathed in warm, golden light, suggesting either sunrise or sunset. The foreground shows a dirt path leading through the desert, with sparse vegetation and a large rock formation on the left. The middle ground features several prominent buttes, including a large one on the left and a smaller one in the center. The background shows a vast, flat desert plain extending to the horizon. The sky is filled with dark, heavy clouds, with the rainbow's colors clearly visible against the backdrop.

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

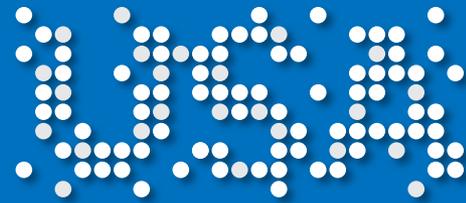
- Post wave campaigns
- Ongoing creative testing
- Website behavioral testing

Partner Satisfaction and Intelligence

- Partner surveys and roundtable meetings



Discussion and Q/A



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Thank You!

Travel Industry Information

@BrandUSA on Twitter
TheBrandUSA.com

Consumer Information

@DiscoverAmerica on Twitter
Facebook.com/DiscoverAmerica
DiscoverAmerica.com