

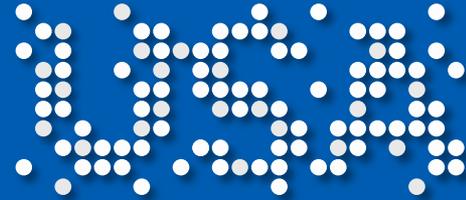
# Brand USA Marketing Committee Meeting

July 1, 2014



DiscoverAmerica.com





DiscoverAmerica.com

# Barbara Richardson

Chair  
Brand USA Marketing Committee



# Agenda

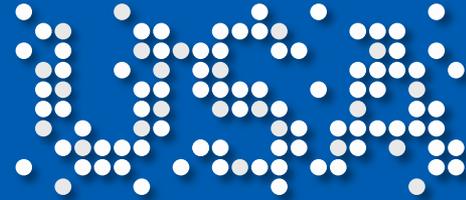
- ◆ **Opening Remarks from Marketing Chair Barbara Richardson**
  - Call the Meeting to Order
  - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **Item 1: Approval of Meeting Minutes**
- ◆ **Item 2: FY15 Objectives**
- ◆ **Item 3: FY15 Marketing Plan**
  - Marketing Overview
  - Target Markets
  - Consumer Campaign
  - Co-op Programs
  - Trade Outreach
  - Federal Collaboration
- ◆ **Item 4: FY15 Marketing Budget**
- ◆ **Item 5: Industry Engagement and Marketing Planning Cycle**
  - Industry Roundtables
  - FY15 and Future Years' Marketing Planning Cycles
- ◆ **Questions/Comments**
- ◆ **Closing Remarks**



# ITEM 2

FY15 Objectives





DiscoverAmerica.com

# Chris Thompson

President & CEO

Brand USA

# FY 15 Objectives (draft as of 6/30/14)

- **Objective #1: Continue to drive positive awareness and perceptions of the United States as a travel destination in order to increase international visitation, spend and global market share for the United States**

*Supports Strategic Map Objective: Drive Visitation and Spend*

- **Objective #2: Focus FY14 campaign activity on the following objectives:**

- ◆ Protecting and/or improving the image and perceptions of the United States as measured by independently conducted post-wave campaign research
- ◆ Protecting and/or increasing intent to travel to the United States as measured by independently conducted post-wave campaign research

*Supports Strategic Map Objective: Drive Visitation and Spend*

- **Objective #3: Activate the consumer campaign in international markets that generate 81% of inbound travel to the United States**

*Supports Strategic Map Objective: Drive Visitation and Spend*



# FY 15 Objectives (draft as of 6/30/14)

- **Objective #4:** Execute the fully integrated metrics plan to measure performance of all marketing activities, including: Market Intelligence, Creative and Product Testing, Marketing Mix Optimization, Awareness, Engagement, Consideration/Action, Purchase (Visitation, Spend, Economic Impact) & Sharing

*Supports Strategic Map Objective: Drive Visitation and Spend*

- **Objective #5:** Create and add value for partners by developing and executing programs and campaigns that support the objectives of the Travel Promotion Act and the National Travel and Tourism Strategy

*Supports Strategic Map Objective: Develop and package compelling value-added programs and campaigns*

- **Objective #6:** Expand global representation firms to have a presence in markets that generate 90% of inbound travel to the United States; align international firms to complement and augment marketing strategy and campaign market launches

*Supports Strategic Map Objective: Drive Visitation and Spend*



# FY 15 Objectives (draft as of 6/30/14)

- **Objective #7: Align and unify the industry's international marketing efforts through tradeshow, sales missions, workshops/seminars and other travel trade outreach and consumer marketing programs**

*Supports Strategic Map Objective: Align and leverage the collective force of the industry*

- **Objective #8: Build engagement, trust and advocacy for Brand USA through strategic communications and industry relations**

*Supports Strategic Map Objective: Align and leverage the collective force of the industry*

- **Objective #9: Collaborate with the Federal government on communication of visa and entry and implementation on the National Travel and Tourism Strategy**

*Supports Strategic Map Objective: Align our programs to ensure ongoing support of the national travel and tourism strategy*

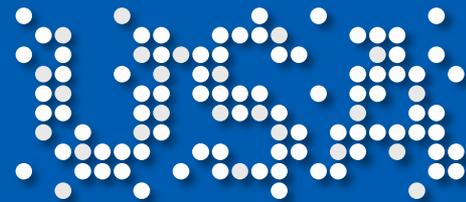
- **Objective #10: Generate a combination of cash and in-kind contributions from the private sector to generate \$100 million and thereby optimize the 1:1 match**

*Supports Strategic Map Objective: Optimize the match*



# Agenda

- ◆ **Opening Remarks from Marketing Chair Barbara Richardson**
  - Call the Meeting to Order
  - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **Item 1: Approval of Meeting Minutes**
- ◆ **Item 2: FY15 Objectives**
- ◆ **Item 3: FY15 Marketing Plan**
  - Marketing Overview
  - Target Markets
  - Consumer Campaign
  - Co-op Programs
  - Trade Outreach
  - Federal Collaboration
- ◆ **Item 4: FY15 Marketing Budget**
- ◆ **Item 5: Industry Engagement and Marketing Planning Cycle**
  - Industry Roundtables
  - FY15 and Future Years' Marketing Planning Cycles
- ◆ **Questions/Comments**
- ◆ **Closing Remarks**



DiscoverAmerica.com

# Tom Garzilli

**SVP, Global Partner Marketing &  
Acting Chief Marketing Officer**

**Brand USA**

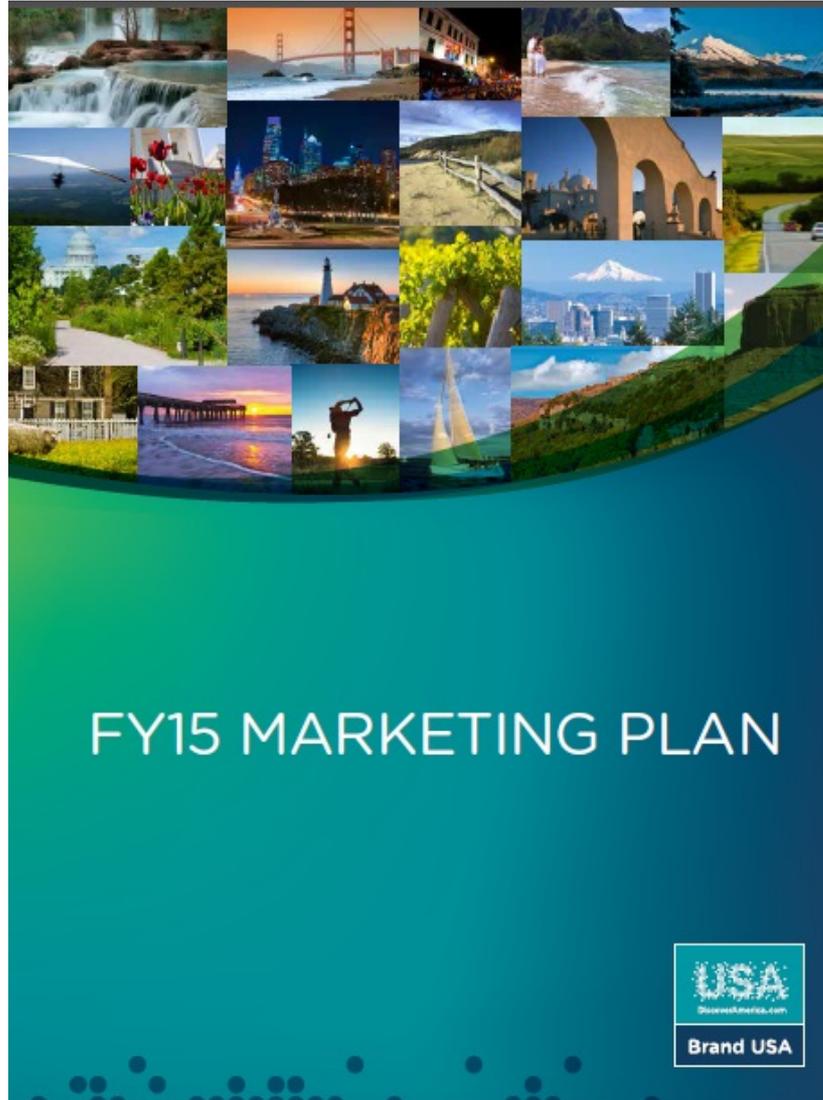
# ITEM 3

FY15 Marketing Plan



DiscoverAmerica.com

# Marketing Plan Overview



- **FY15 Objectives**
- **Target Markets**
- **Research**
- **Path to 100 Million International Visitors**
- **Marketing Initiatives**
  - Consumer Brand Campaign
  - Consumer Co-op Marketing
  - Travel Trade Initiatives

# FY15 Marketing Plan Overview

- **Consumer Brand Campaign will be fully deployed in 13 markets (consumer, co-op and trade) representing 81% of inbound travel**

- Australia
- Brazil
- Canada
- Chile
- China
- France
- Germany
- India
- Japan
- South Korea
- Mexico
- Taiwan
- United Kingdom

# FY15 Marketing Plan Overview

- **Trade outreach activities in 20 markets (USA pavilions and international representation firms)**

- Australia
- Austria
- Brazil
- Canada
- China
- France
- Germany
- Hong Kong
- India
- Ireland
- Italy
- Japan
- Mexico
- New Zealand
- Russia
- South Korea
- Switzerland
- Taiwan
- United Arab Emirates
- United Kingdom

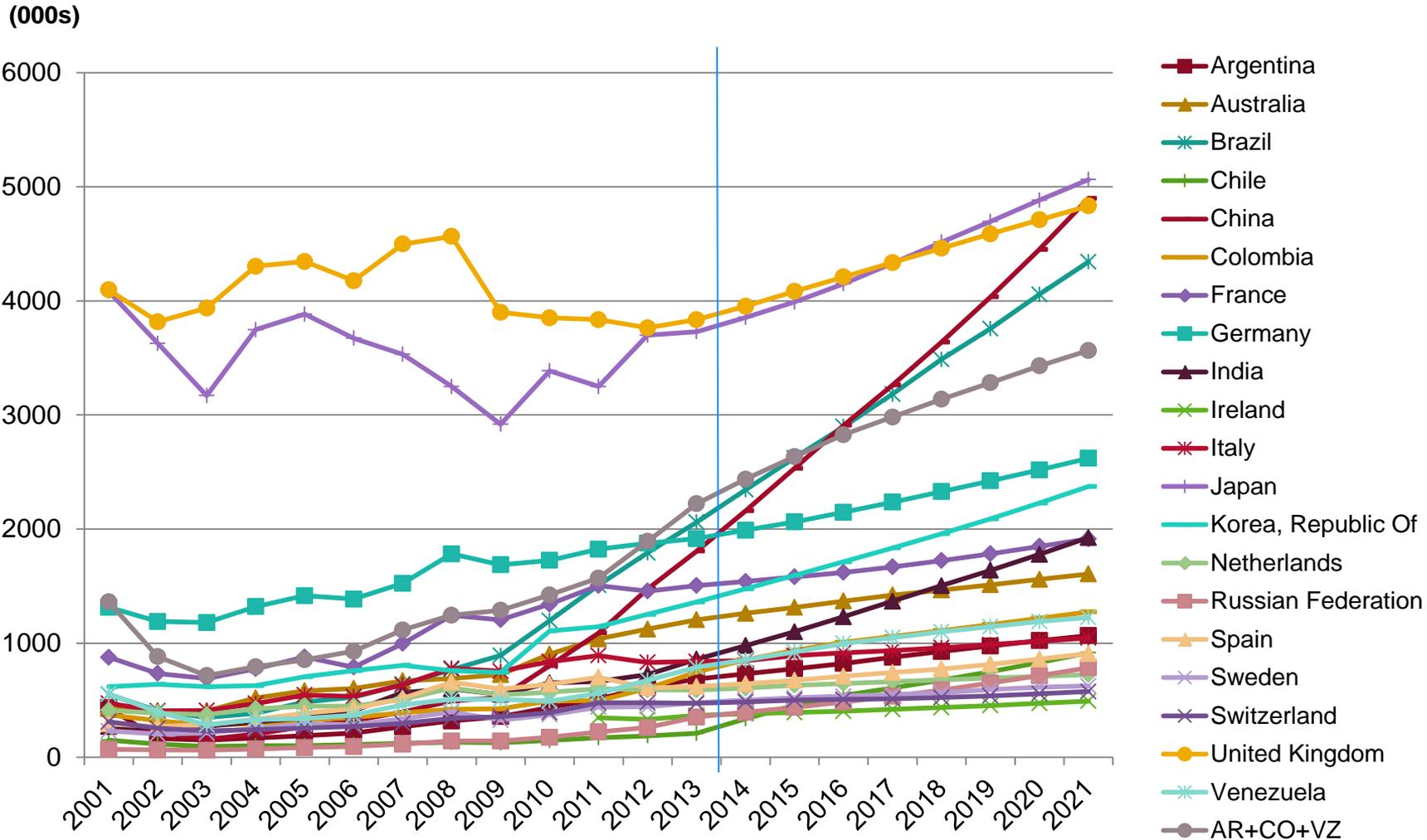
# Marketing Plan Overview

- **Marketing initiatives in more than 30 markets**

(at least two initiatives – any combination of consumer campaign, co-op or trade)

- Argentina
- Australia
- Austria
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Costa Rica
- El Salvador
- France
- Germany
- Guatemala
- Honduras
- Hong Kong
- India
- Nicaragua
- India
- Ireland
- Italy
- Japan
- South Korea
- Mexico
- Netherlands
- New Zealand
- Nicaragua
- Panama
- Russia
- Singapore
- Spain
- Sweden
- Switzerland
- Taiwan
- United Arab Emirates
- United Kingdom

# Path to 100 Million International Arrivals



# Path to 100 Million International Arrivals

- **Established Markets**

- More cooperatively driven marketing campaigns
- Package and Price inclusions
- More focus on trade and airline activation

- **Emerging Markets**

- Brand-led approach to marketing
- Aspiration and Education focused advertising
- More focus on Trade awareness and education

# Consumer Campaign FY15 Plan Highlights

- **Continue Creative Refresh Process**
  - Enhancements versus a completely new campaign
- **Ongoing Consumer Research**
  - Dream Catcher project underway in 9 countries including 20 markets with a total of 40 focus groups
- **Leveraging High-Quality Creative Assets**
  - Saving significant creative and production costs by utilizing MacGillivray Freeman Films' contribution of Giant Screen quality film assets to develop 30 and 60 second spots

The current plan and budget does not anticipate a brand new creative approach

# Consumer Co-op Marketing Strategy FY15 Plan Highlights

- Maximize value to stakeholders, and provide marketing opportunities otherwise not available
- Optimize stakeholder value at all levels of participation
- 100+ partner programs / 200 opportunities
  - **Brand USA Originals:** Inspiration Guide, In-Language Video and Distribution, Multi-Channel Programs
  - **Affinity Programs:** OTA partners, Digital Media Partners
  - **Digital Marketing:** Social Content Hubs
  - **Thematic/Experiential:** Great Outdoors Strategy

# Great Outdoors Strategy

- **Anchored by our Giant Screen Film: Celebrates the Centennial of the National Park Service**
- **Social Content Hub: The United States of Awesome**
- **Road Trips: National Geographic Digital Nomad**
  - 5 journeys across the country, beginning with Route 66
  - 22 destination partners
  - Highest rated road trip
  - Average consumer engagement of more than 13.5 minutes
  - Over 7 million impressions to date

# Trade Outreach FY15 Plan Highlights

- **International Office Network**

- Currently 12 offices throughout Europe, the United Kingdom, Latin America, Australia, and Asia to manage outreach in 20 markets
- Once fully established, Brand USA will have representation offices in 18 regions covering over 40 countries

- **MegaFams**

- Australia MegaFam to take place in November 2014
- Germany MegaFam to take place in April 2015
- UK MegaFam to take place in May 2015
- Mexico MegaFam to take place in August 2015

# Trade Outreach FY15 Plan Highlights

- **Sales Missions**

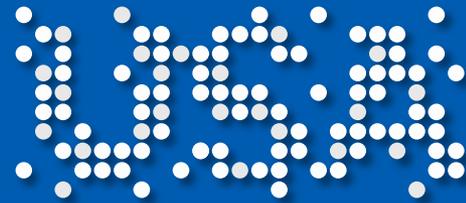
- Upcoming missions scheduled: China, India and Hong Kong

- **Road Shows**

- Canada September 2014
- Australia February 2015

# Agenda

- ◆ **Opening Remarks from Marketing Chair Barbara Richardson**
  - Call the Meeting to Order
  - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **Item 1: Approval of Meeting Minutes**
- ◆ **Item 2: FY15 Objectives**
- ◆ **Item 3: FY15 Marketing Plan**
  - Marketing Overview
  - Target Markets
  - Consumer Campaign
  - Co-op Programs
  - Trade Outreach
  - Federal Collaboration
- ◆ **Item 4: FY15 Marketing Budget**
- ◆ **Item 5: Industry Engagement and Marketing Planning Cycle**
  - Industry Roundtables
  - FY15 and Future Years' Marketing Planning Cycles
- ◆ **Questions/Comments**
- ◆ **Closing Remarks**



[DiscoverAmerica.com](http://DiscoverAmerica.com)

# Anne Madison

Chief Communications Officer

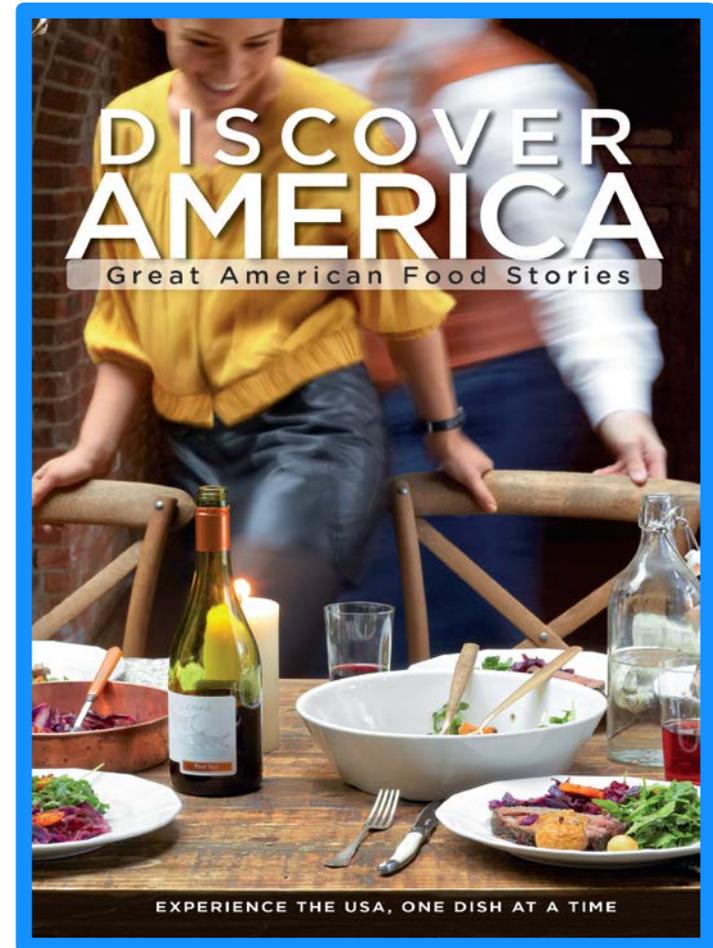
Brand USA

# Federal Collaboration

- **Support the National Travel and Tourism Strategy**
- **Market the Welcome**
  - Communicate Visa and Entry Policy
  - Promote Trusted Traveler Programs / Global Entry
  - Ports of Entry and Embassy: Marketing/Communication Materials
- **Collaborate with the Tourism Policy Council**
  - Marketing and Promotion Working Group
  - Ease of Travel Working Group
  - Research Working Group

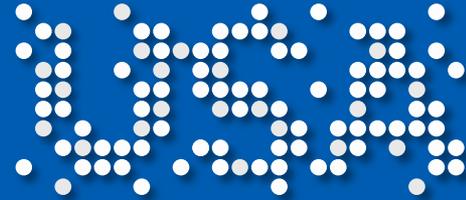
# Discover America: Great American Food Stories

- Showcasing USA's culinary landscape
- **14** key markets
- **6** languages
- **51** chefs including **31** James Beard-awarded chefs
- [DiscoverAmerica.com/foodstories](https://DiscoverAmerica.com/foodstories)
  - Celebrity chefs
  - More recipes
  - #FoodStoriesUSA



# Agenda

- ◆ **Opening Remarks from Marketing Chair Barbara Richardson**
  - Call the Meeting to Order
  - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **Item 1: Approval of Meeting Minutes**
- ◆ **Item 2: FY15 Objectives**
- ◆ **Item 3: FY15 Marketing Plan**
  - Marketing Overview
  - Target Markets
  - Consumer Campaign
  - Co-op Programs
  - Trade Outreach
  - Federal Collaboration
- ◆ **Item 4: FY15 Marketing Budget**
- ◆ **Item 5: Industry Engagement and Marketing Planning Cycle**
  - Industry Roundtables
  - FY15 and Future Years' Marketing Planning Cycles
- ◆ **Questions/Comments**
- ◆ **Closing Remarks**



DiscoverAmerica.com

# Tom Garzilli

**SVP, Global Partner Marketing &  
Acting Chief Marketing Officer**

**Brand USA**

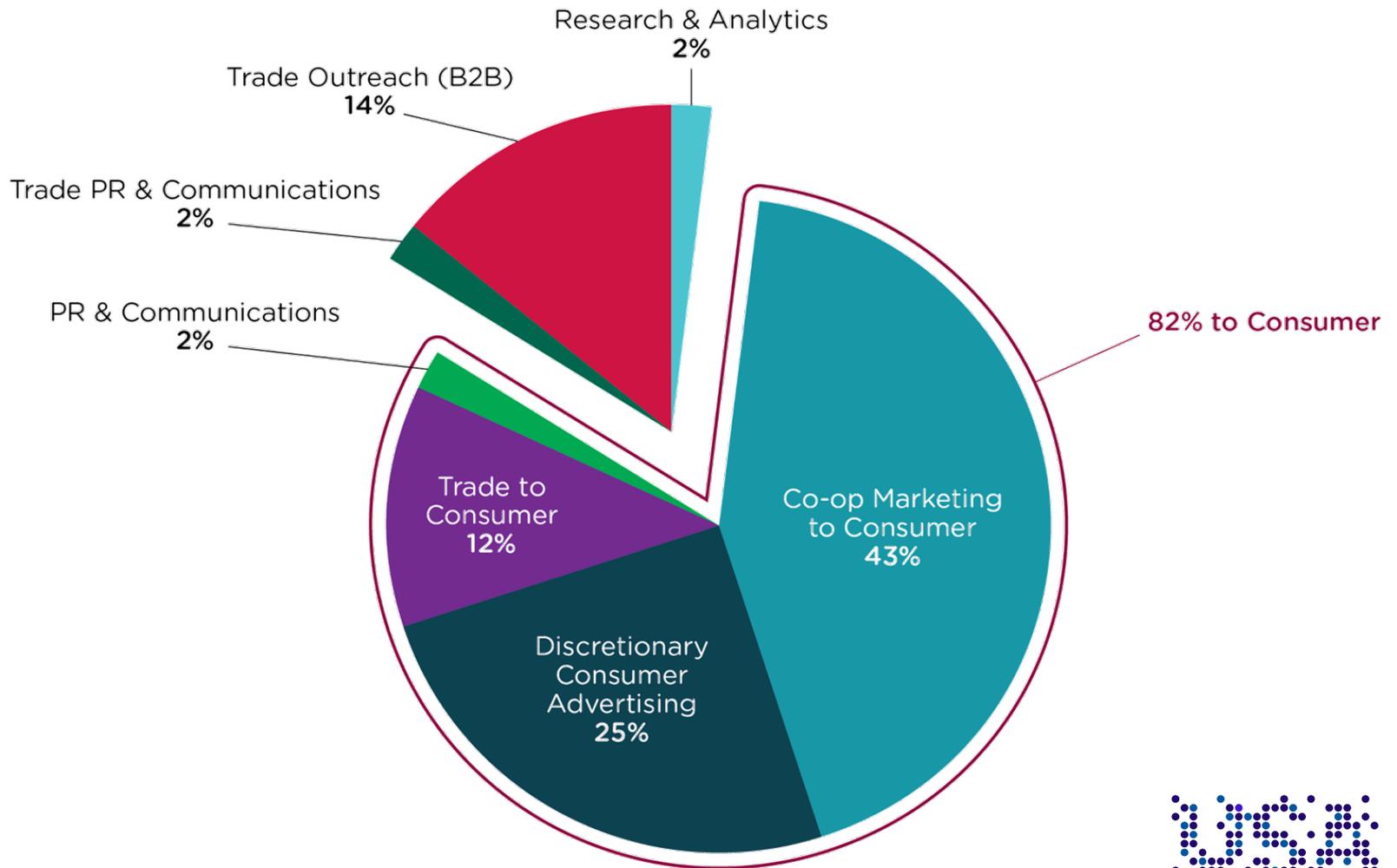
# ITEM 4

FY15 Marketing  
Budget



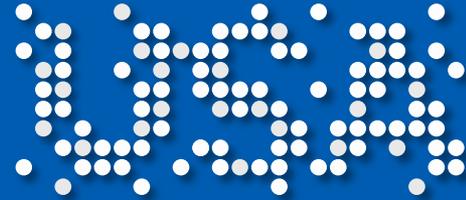
[DiscoverAmerica.com](http://DiscoverAmerica.com)

# Marketing and PR / Communications FY15 Proposed Budget \$139,000,000



# Agenda

- ◆ **Opening Remarks from Marketing Chair Barbara Richardson**
  - Call the Meeting to Order
  - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **Item 1: Approval of Meeting Minutes**
- ◆ **Item 2: FY15 Objectives**
- ◆ **Item 3: FY15 Marketing Plan**
  - Marketing Overview
  - Target Markets
  - Consumer Campaign
  - Co-op Programs
  - Trade Outreach
  - Federal Collaboration
- ◆ **Item 4: FY15 Marketing Budget**
- ◆ **Item 5: Industry Engagement and Marketing Planning Cycle**
  - Industry Roundtables
  - FY15 and Future Years' Marketing Planning Cycles
- ◆ **Questions/Comments**
- ◆ **Closing Remarks**



DiscoverAmerica.com

# Chris Thompson

President & CEO

Brand USA

# ITEM 5

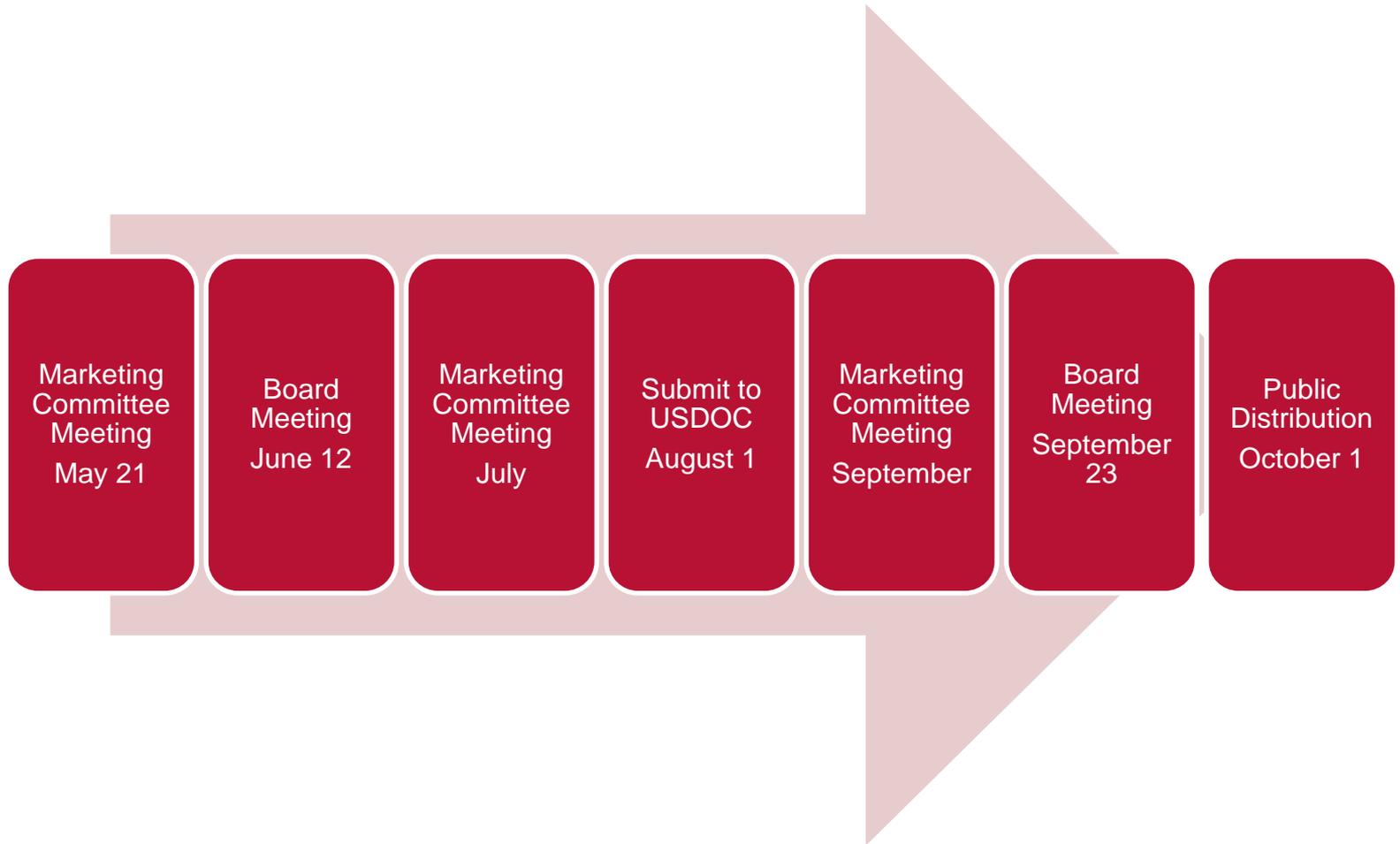
Industry  
Engagement and  
Marketing Planning  
Cycle



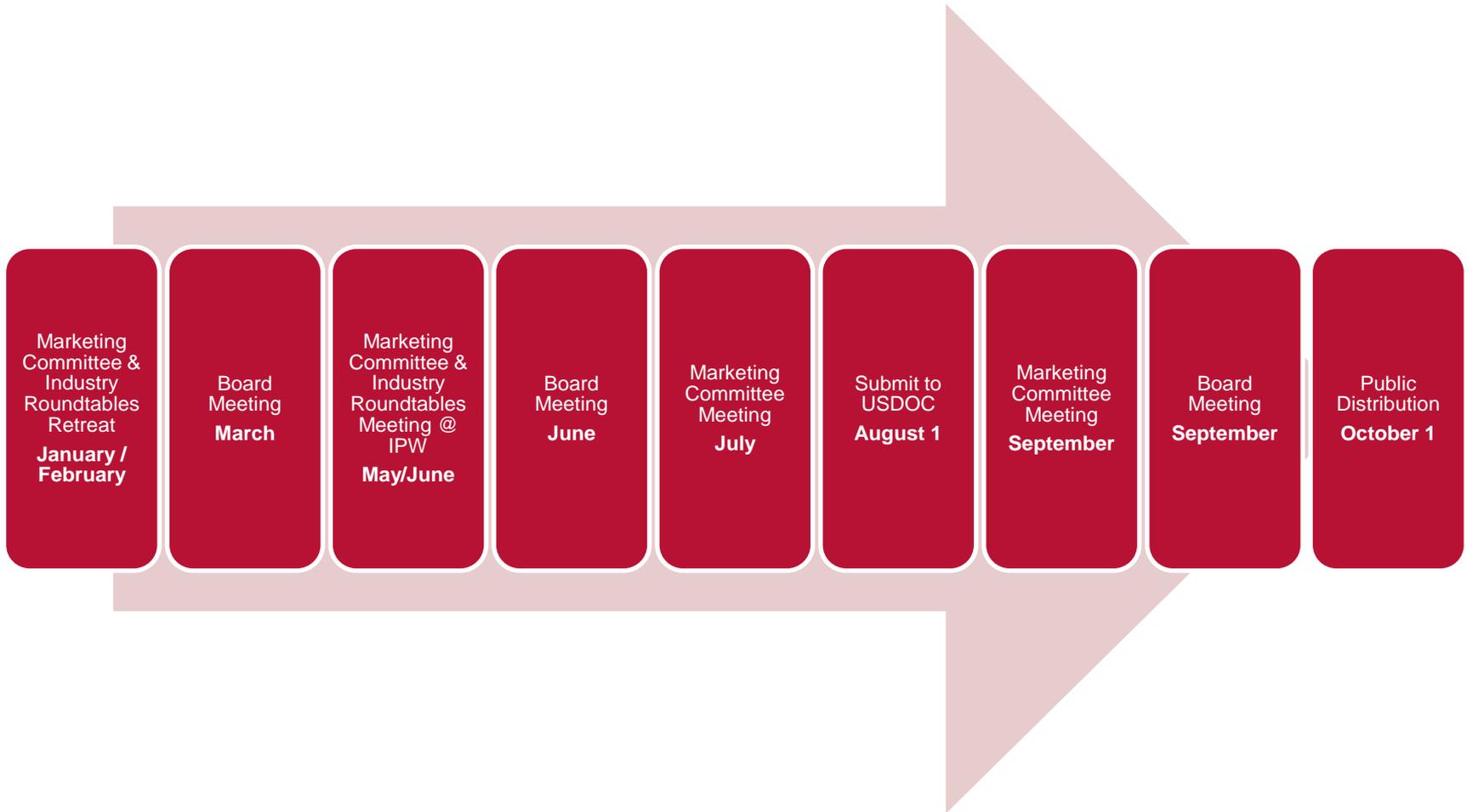
# Industry Roundtables



# FY 15 Marketing Planning Cycle

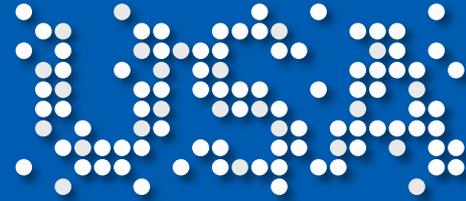


# Future Years Marketing Planning Cycle



# Agenda

- ◆ **Opening Remarks from Marketing Chair Barbara Richardson**
  - Call the Meeting to Order
  - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **Item 1: Approval of Meeting Minutes**
- ◆ **Item 2: FY15 Objectives**
- ◆ **Item 3: FY15 Marketing Plan**
  - Marketing Overview
  - Target Markets
  - Consumer Campaign
  - Co-op Programs
  - Trade Outreach
  - Federal Collaboration
- ◆ **Item 4: FY15 Marketing Budget**
- ◆ **Item 5: Industry Engagement and Marketing Planning Cycle**
  - Industry Roundtables
  - FY15 and Future Years' Marketing Planning Cycles
- ◆ **Questions/Comments**
- ◆ **Closing Remarks**



DiscoverAmerica.com

# Barbara Richardson

Chair  
Brand USA Marketing Committee





# QUESTIONS AND COMMENTS



DiscoverAmerica.com

# Thank You for Joining Us Today

## Travel Industry Information

@BrandUSA on Twitter  
TheBrandUSA.com

## Consumer Information

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

**For Additional Information, email us**

BoardMeetings@TheBrandUSA.com

**Next Board Meeting:**

*September 23, 2014*

