



Q3-FY2019

Marketing Committee
Meeting

May 21, 2019



Marketing Committee Agenda

- **Opening Remarks**
 - Call the meeting to order
 - Introductions: Management, Legal Counsel and Invited Guests
- **Item 1: Approval of Minutes from the March 12, 2019 Meeting***
- **Item 2: CMO Update**
- **Item 3: FY2020 Proposed Objectives**
- **Item 4: Partner Programs Update**
- **Item 5: Global Trade Development Update**
- **Item 6: Integrated Marketing Update**
- **Questions/Comments**
- **Closing Remarks and Adjourn Meeting**

*Vote Required

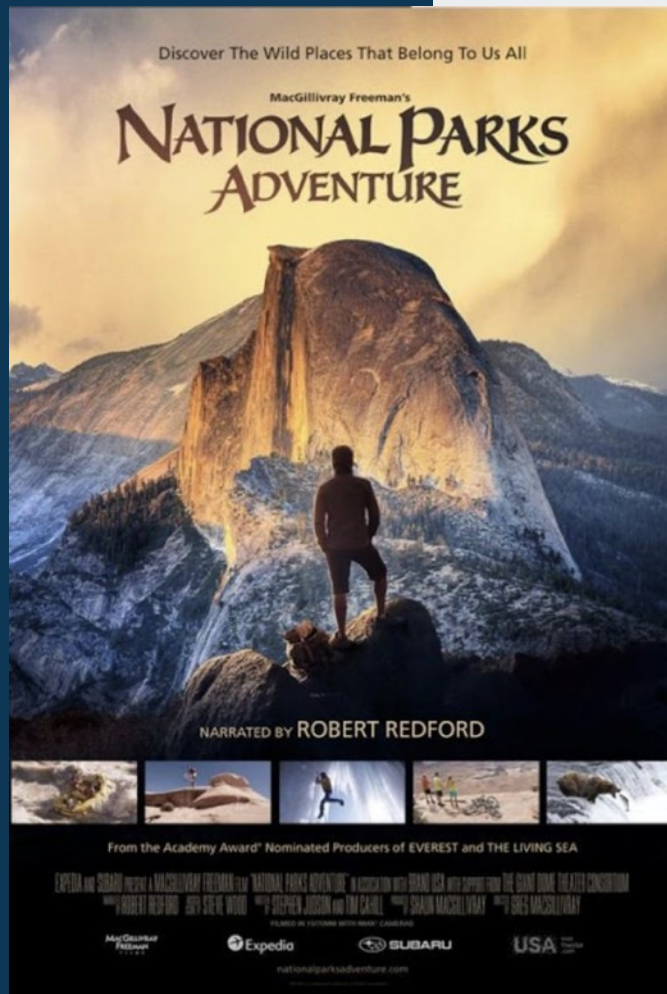
Opening Remarks



Item 1: Approval of the Minutes*



Item 2: CMO Update



WE'VE GONE
OFF THE BEATEN
PATH AND HAVE
HAD AN
EXTRAORDINARY
JOURNEY

Pioneering new, uncharted territory
with two ambitious IMAX® films

And, we've made amazing things happen.

Connected viewers to the best America has to offer
and inspired off-the-beaten-path discovery

81%

are much more likely/somewhat more likely to visit the U.S. as a result of the film

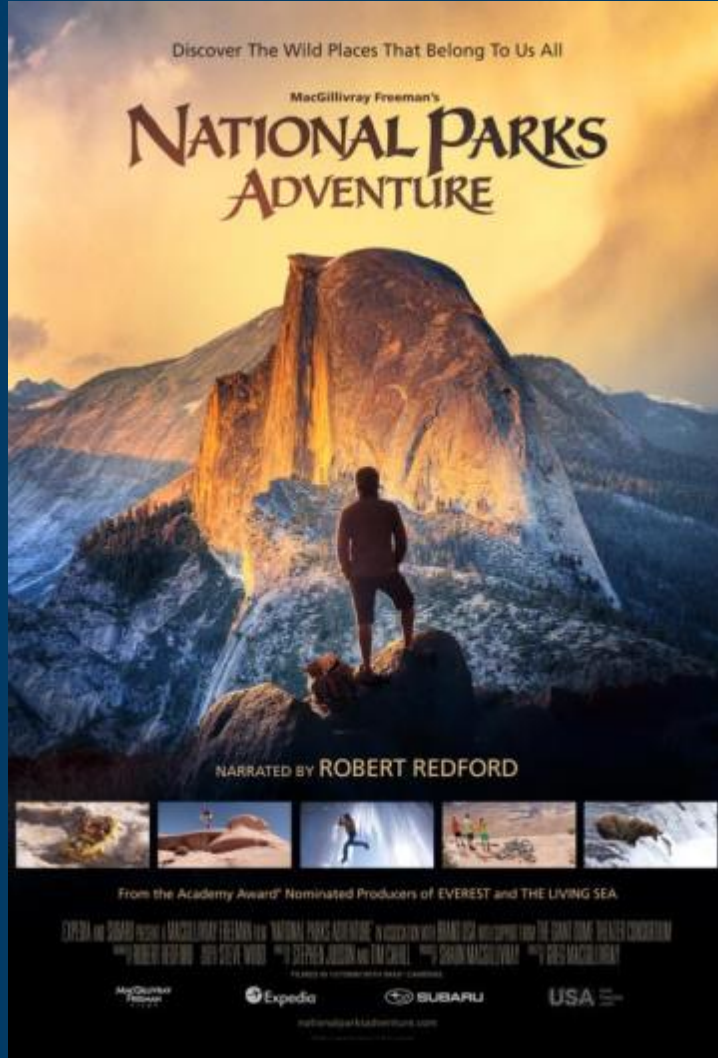
62%

are more likely to choose the U.S. instead of another destination after watching National Parks Adventure

“What a very special event. The reception was lovely, and I so enjoyed the movie. I am inspired to go experience some of those beautiful parks.”

Teresa Hartle,
Atlanta

Giant Screen Films: ROI



In two years
since the film's release:

More than **170,000**
incremental visitors

Nearly **\$700 million**
in incremental visitor spending

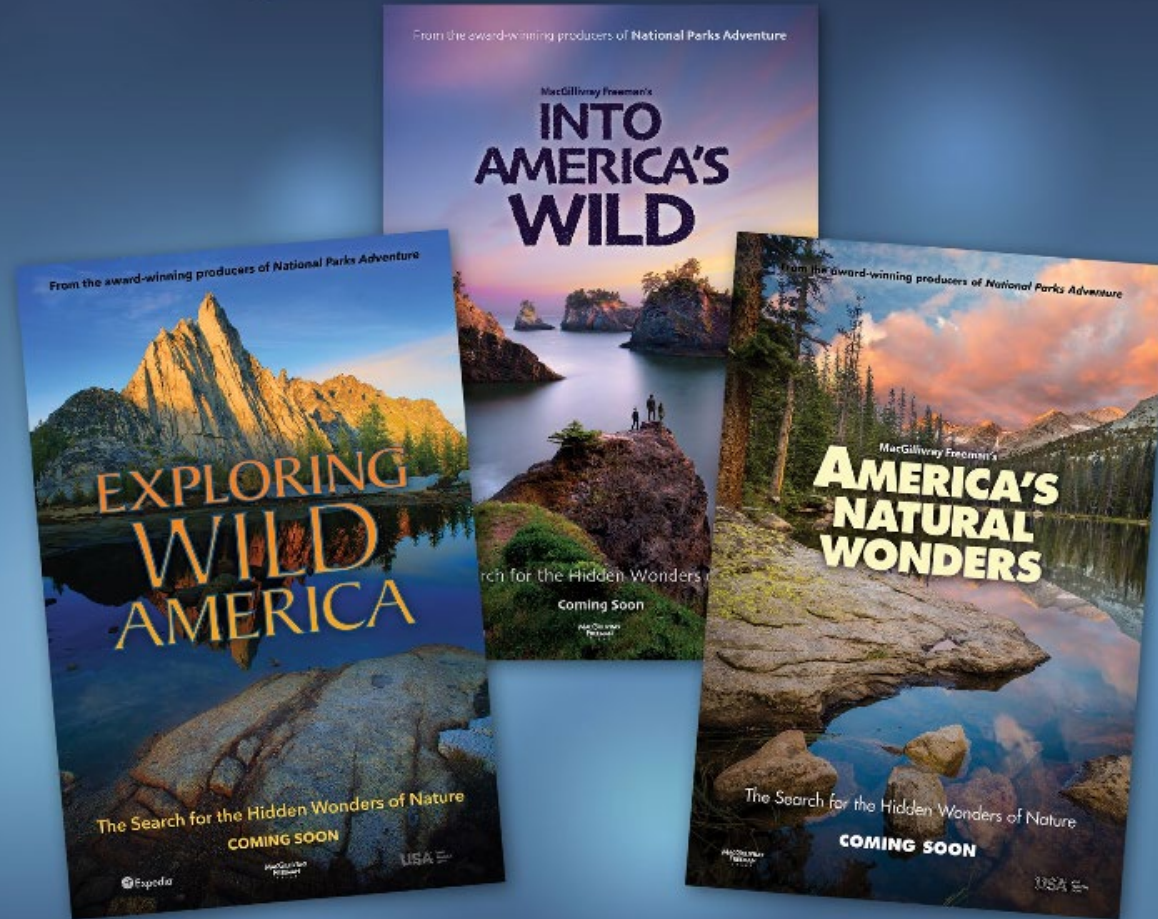
\$1.5 billion
total economic impact

FILM ROI 56:1

Source: Oxford Economics

From the producers of *National Parks Adventure* and *America's Musical Journey*

Coming Soon...Our Next Adventure



Stop by the Brand USA booth #2442 to cast your vote
and help us choose the title.

A Film for Giant Screen Theaters

AVAILABLE FEBRUARY 2020

www.intoamericaswild.com



Brand USA Travel Week London: September 9-13, 2019



Brand USA

Brand USA Travel Week Update

- Total Registered Suppliers* 82/127
- Total Registered Buyers* 113

Next Steps:

- Continue Buyer/Supplier Recruitment at IPW
- Finalize Enrichment Series Topics and Speakers
- Recruit for Sponsorship Opportunities

Travel Week 2020:

- Europe (tentatively September 7-14, 2020)
- India (tentatively October 5, 2020)

* As of May 14, 2019





Item 3:
FY2020 Proposed Objectives

FY2020 Proposed Objectives

Objective	Goals	Strategies
Drive Results	<ul style="list-style-type: none"> 1.39 million incremental international visitors (+7% vs FY2019 target) \$5.5 billion in incremental international spend (+10% vs FY2019 target) \$9.79 billion in total economic impact (+3% vs FY2019 target) Marketing ROI 32:1; overall ROI 29:1 (vs FY2019 targets of 30:1 and 27:1) Overhead below 15% 	<ul style="list-style-type: none"> Continue development of GoUSA TV content and promotion Marketing and distribution of 3rd film Expand consumer public relations Continued leadership in high-engagement channels
Create Innovative Marketing	<ul style="list-style-type: none"> Ensure equal marketing of rural and urban areas across the total of all marketing efforts Support all 50 states, the District of Columbia, and 5 territories Generate 2.92 billion social impressions (+15% vs FY 2019 forecast) Generate 950 million video views across paid, earned, owned, and third-party channels Protect and maintain average intent to visit across all markets at 60% 	<ul style="list-style-type: none"> Sell the inherent diversity of experiences in order to fuel initial discovery, return trips, and extending the stay—with experience first storytelling strategies Leverage market prioritization and segmentation to engage travelers where they are in the travel lifecycle.
Market the Welcome	<ul style="list-style-type: none"> Deploy international arrival program in 15 international arrival halls and/or embassies/consulates Increase translated content regarding practical travel information and entry policy on consumer websites by 25% 	<ul style="list-style-type: none"> Integration of Market the Welcome programming as part of federal partner country plans Coordinate with the Departments of Commerce, Homeland Security, and State to communicate vital and compelling information regarding visa and entry policies Address and correct misperceptions about entry policies
Build & Maintain Trust	<ul style="list-style-type: none"> Ensure 100% compliance with policies & Travel Promotion Act Expand partner results reporting by 25% 	<ul style="list-style-type: none"> Ongoing review of controls to ensure efficiency and compliance Increase responsiveness and reporting
Add and Create Value	<ul style="list-style-type: none"> Generate \$100 million in contributions from private industry and other non-federal sources (with no less than 30% from cash contributions and no more than 70% from in-kind contributions) Earn a 90% or better (top 2 boxes) partner satisfaction survey question “Brand USA’s partnership provides value to my organization” Earn a 85% or better partner program retention rate 	<ul style="list-style-type: none"> Optimize cash and maximize in-kind content contributions Expand sponsorship revenue streams Expand program offerings for smaller destinations Expand global trade strategies for product development, MICE Overhaul our international trade show and outreach strategies

Item 4: Partner Programs Update

USA

VisitTheUSA.com

Brand USA

Originals Programs

Global Inspiration Program

NEW since 2019, GIP includes mobile take-over ads in Canada, UK, Australia, Germany, and Brazil



Visit the USA

- City Page
- Custom Subsite
- Experience Page
- State Page
- Trips Page
- Traffic Generation
- Search Engine Marketing

Video Programs

- Destination-At-A-Glance
- Road Trips
- Themed Content Package
- Distribution

Other

- Sorted Food
- Thomas Cook
- Travel Week
- United Stories
- USA Discovery



FY18 Results*

30
million
page
views

20%
Increase YOY

21.6
million
sessions

19%
Increase YOY

*Includes Non-US Traffic across Visit The USA languages with the exclusion of the China sites from January 1, 2018 – December 31, 2018.

Multi-Channel Programs

- **Australia**
 - Fall: Oct-Nov
 - Spring: April-June
- **Brazil**
 - Spring: April-May
- **Canada**
 - Winter: Jan-Feb
 - Spring: May-June
- **China**
 - Fall: Sep-Nov
 - Spring: May-July
- **Germany**
 - Fall: Nov-Dec
 - Spring: April-May
- **India**
 - Winter: Feb-Mar
- **Japan**
 - Spring: April-May
- **Mexico**
 - Spring: Feb-May
- **UK**
 - Fall: Oct-Nov
 - Winter: Jan-Feb

NEW FY20 Markets

France

- Winter: Jan-Mar

South Korea

- Winter: Jan-Feb

Mobile Takeover Ads

In FY20, Australia, Brazil, France, Germany, Japan, and South Korea will all feature mobile interstitial campaigns

FY18 Result Snapshot



2.24M
Total clicks



\$86M
Total bookings,
post-view and
post-click**



1.26M
Total clicks, likes,
and shares

*Overview results include aggregate results for all Fiscal Year 2018 Multi-Channel programs with the exception of Mexico and China.

**Total gross revenue booked across Expedia Group brands after viewing or clicking on a Multi-Channel banner ad; 30-day look back window.



Market-Specific Programs



Australia

- Media Program*
- Flight Network
- Rogers Media



Canada



China

- China Social Influencer
- Ctrip



India

- MakeMy Trip*



Mexico

- Televisa



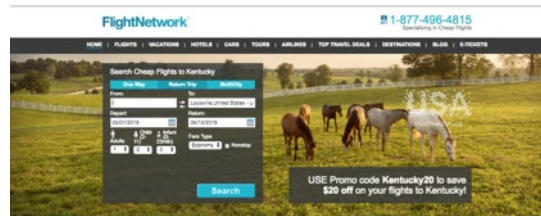
New Zealand

- New Zealand Media and Entertainment (NZME)



United Kingdom

- British Airways
- JCDecaux
- News UK
- Telegraph



Experience Kentucky

It's more than just the sights, sounds and tastes. What makes Kentucky special is a combination of all three, near the heart of American history. In the Bluegrass Capital of the World, the music is playing and the rolling green hills are calling. This is the place to see champagne being produced near by that place in history to make and award in the country's history of the country. Put it all in one place and you'll see why the Bluegrass State is waiting for you.





Item 5: Global Trade Development Update

Global Trade Development – New Teams & Employees

- In April, Brand USA welcomed:
 - Colin Skerritt, Regional, Director, Canada
 - Edelman/IConnect, Korea
- Pending RFP's:
 - Global Trade Development Contractor: Asia
 - Global Trade Development Contractor (Manager)
 - China Travel Trade Marketing Agency: China



Item 6: Integrated Marketing

A Little History

2012

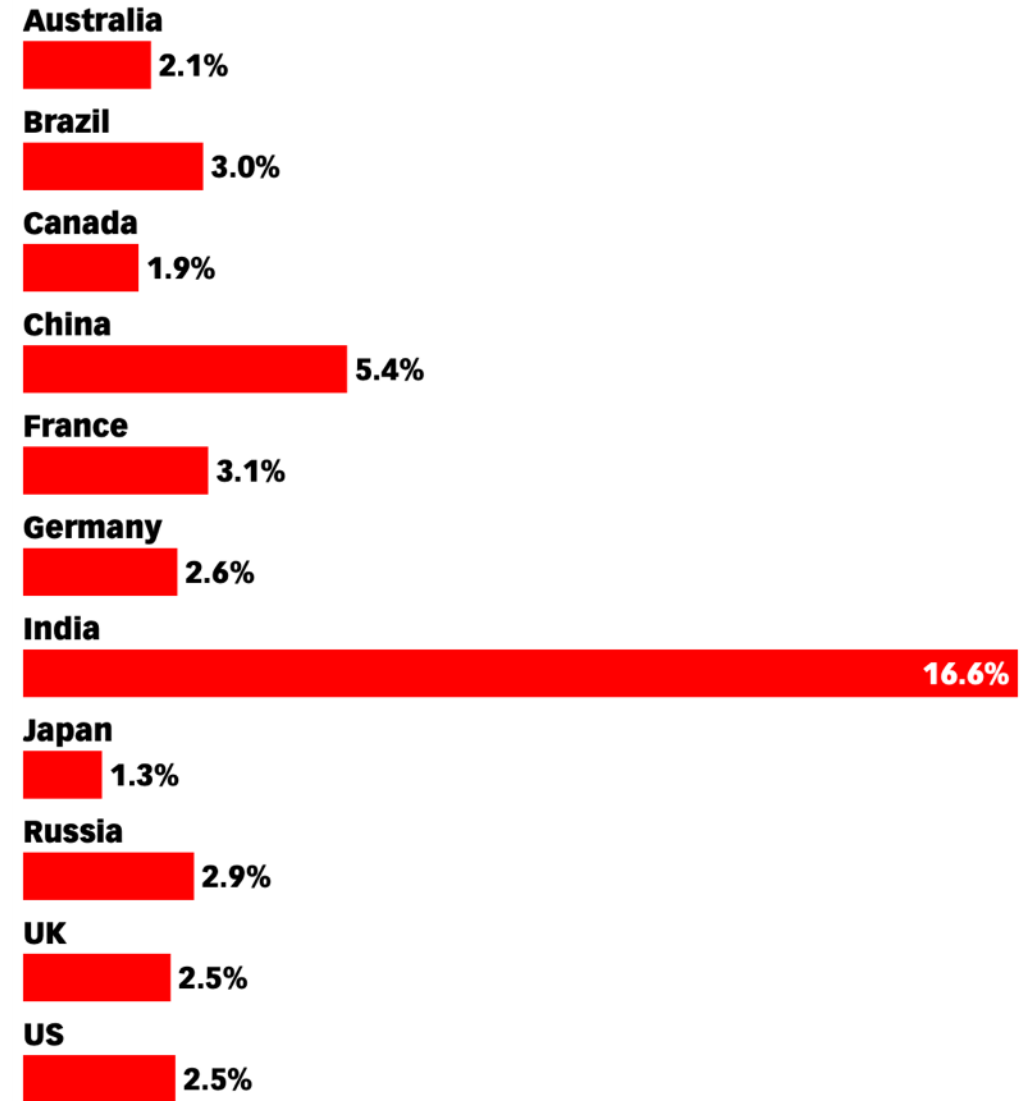
- Launched TV campaign in 5 markets with one-size-fits-all creative
- AOR needed for long-hallway support to a small consumer marketing team across all media and communication platforms
- Digital was nascent; social was organic

2019

- Expanded to 14 markets, which requires nuanced messaging and media mix
- Expanded; internal consumer team works with best in breed creative and media resources
- Digital and social are everything
- And video is everywhere

Digital video viewing - already one of the top digital activities worldwide - continues to grow, driven by expanding mobile usage and improving broadband connections.

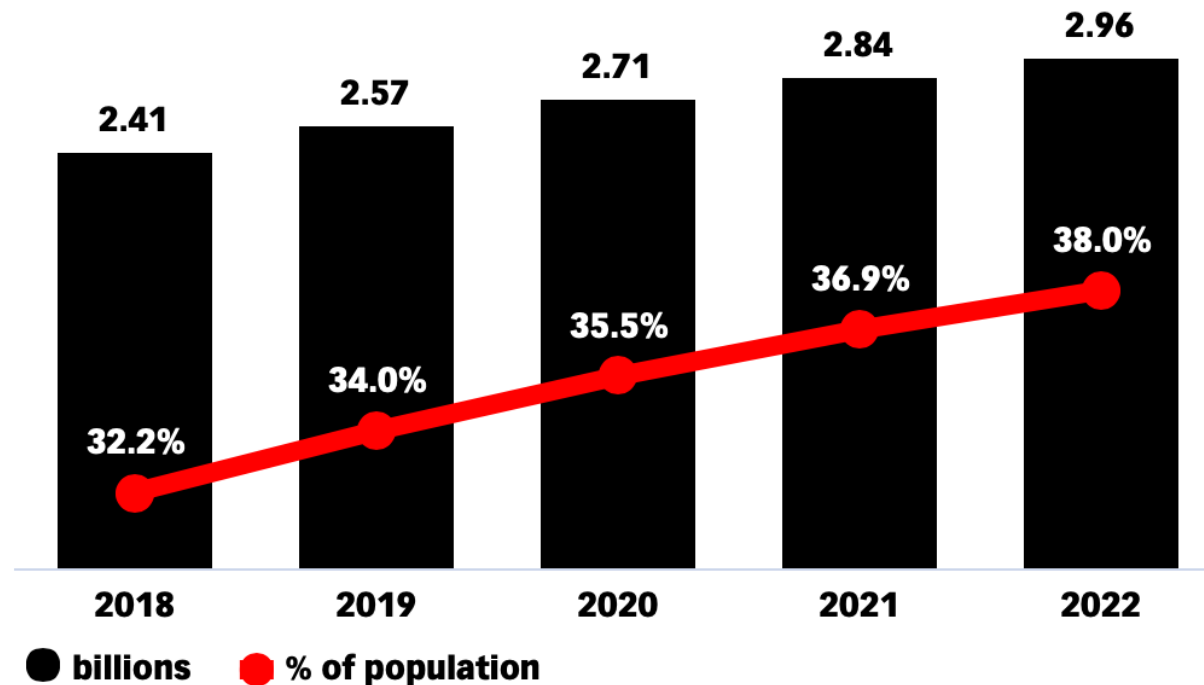
Digital Video Viewer Growth Worldwide, by Country 2019, % change



Source: eMarketer, March 2019

Digital Video Viewers

Worldwide, 2018-2022



Source: eMarketer, November 2018

www.eMarketer.com

Though YouTube and Facebook are the leading platforms for video viewership - the availability of digital video content across mobile messaging apps and social networks has also sustained viewer engagement.

Video Content Represents Pure Connectivity

Video does what text doesn't.
It creates immediate, real and
authentic interest and
engagement with audience
members.



Evolution of Dance

2005



Charlie Bit My Finger

2007



Gangnam Style

2012



Watch Me (Whip/Nae Nae)

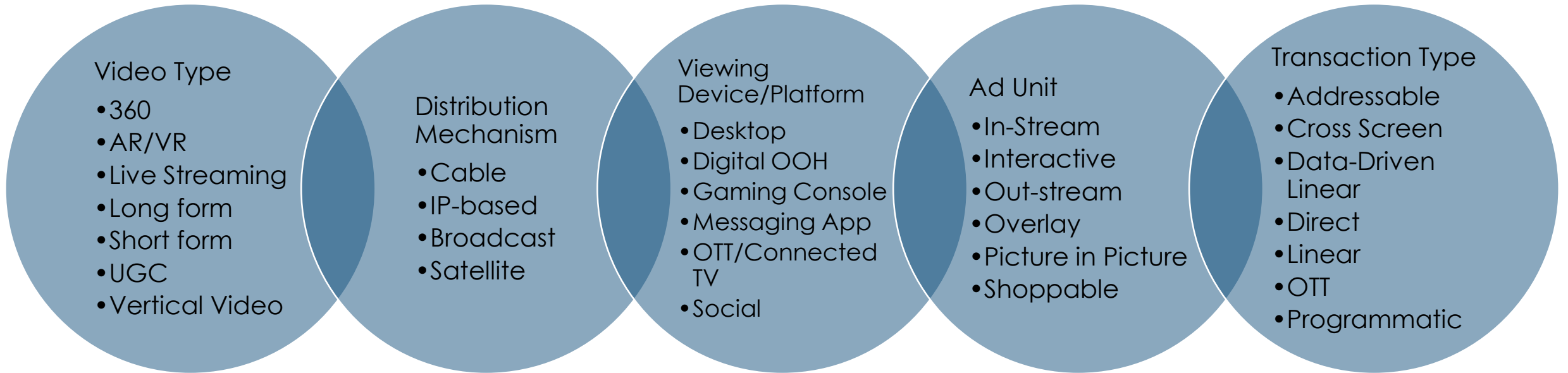
2015



Yanni or Laurel

2018

But the Video Landscape Is Complex



So how do we know if we're being successful?

Evolving Campaign Measurement

Campaign Dashboard

By clearly defining objectives and KPIs.



Channel
Agnostic

- Objective-led
- Based on desired user action

Standardize

- Agencies
- Publishers
- Ad formats

Qualitative
measures

- Creative appeal and shift in intent

Wider
consumer
touchpoints

- Consumer Public relations

Metrics Template

Fiscal Year	Fiscal Quarter	Month	Brand USA/Coop	Partner Name	Ad Unit Type	Publisher (can be individual vendor or category)	Campaign (See Campaign Key Tab)	Agency	Country	Spend (media only)	Gross Spend (media + fees)	Fee%	Impressions/ circulation	CPM	Clicks	CPC	Visits	Visits	Page Views
2019	Q1	12	Brand USA		Post	Facebook	Ask A Local	MediaCom London	IN	5704.5304	6274.98344	10.00	8393860	0.679607523	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - France	MediaCom London	FR	1.38	1.38	0.00	156	8.846153846	6	0.23	4	4	5
2019	Q1	10	Brand USA		Search	Google AdWords	Brand USA - Japan	MediaCom London	JP	355.6	355.6	0.00	4463	79.67734708	373	0.953351206	305	305	0 1
2019	Q1	12	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	MX	2052.69	2052.69	0.00	34664	59.21676667	3168	0.647945076	2949	2949	56 0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - France	MediaCom London	FR	15.1	15.1	0.00	836	18.06220096	30	0.503333333	26	26	40 0
2019	Q1	11	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	JP	2076.97	2076.97	0.00	33604	61.80722533	1471	1.411944256	1312	1312	0 1
2019	Q1	10	Brand USA		Search	Google AdWords	Brand USA - UK	MediaCom London	UK	1400.68	1400.68	0.00	31122	45.00610501	2209	0.634078769	2255	2255	0 0
2019	Q1	11	Brand USA		Search	Bing Ads	AlwaysOn	MediaCom London	CO	0	0	0.00	0	0	0	0	0	0	185
2019	Q1	11	Brand USA		Post	Facebook	GoUSA TV App	MediaCom London	CA	586.82	645.502	10.00	118752	4.941558879	206	2.848640777	0	0	0
2019	Q1	12	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	KR	517.66	517.66	0.00	12959	39.94598349	569	0.909771529	500	500	5
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - India	MediaCom London	IN	1.59	1.59	0.00	359	4.428969359	17	0.093529412	13	13	10 0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - France	MediaCom London	FR	0.49	0.49	0.00	18	27.22222222	1	0.49	0	0	0
2019	Q1	10	Brand USA		Post	Facebook	GoNow	MediaCom London	IN	0	0	10.00	0	0	0	0	0	0	11
2019	Q1	12	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	BR	0	0	0.00	0	0	0	0	0	0	165
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Germany	MediaCom London	DE	0	0	0.00	1	0	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Germany	MediaCom London	DE	1.57	1.57	0.00	155	10.12903226	8	0.19625	7	7	9 0
2019	Q1	11	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	CO	0	0	0.00	0	0	0	0	0	0	469
2019	Q1	12			Post	Facebook	New Year Eve	MediaCom London	N/A	0	0	10.00	0	0	0	0	0	0	5
2019	Q1	11	Brand USA		Search	Bing Ads	AlwaysOn	MediaCom London	CL	21.65	21.65	0.00	2082	10.39865514	66	0.328030303	61	61	0 0
2019	Q1	11	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	MX	1502.17	1502.17	0.00	27772	54.08937059	3188	0.471195107	2805	2805	26 0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Germany	MediaCom London	DE	1.26	1.26	0.00	357	3.529411765	3	0.42	1	1	0
2019	Q1	11	Brand USA		Search	Bing Ads	AlwaysOn	MediaCom London	AU	147.26	147.26	0.00	8071	18.24557056	245	0.601061224	222	222	0 0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - India	MediaCom London	IN	0.76	0.76	0.00	28	27.14285714	1	0.76	1	1	1
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - India	MediaCom London	IN	773.41	773.41	0.00	69151	11.18436465	2218	0.348697034	1495	1495	1994 0
2019	Q1	11	Brand USA		Search	Baidu	AlwaysOn	MediaCom London	CN	0	0	0.00	0	0	0	0	0	0	145
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Japan	MediaCom London	JP	0	0	0.00	184	0	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Google AdWords	Brand USA - Australia	MediaCom London	AU	849.73	849.73	0.00	10931	77.73	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Google AdWords	Brand USA - Germany	MediaCom London	DE	1468.75	1468.75	0.00	17536	83.78	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - India	MediaCom London	IN	184.31	184.31	0.00	14663	12.60	0	0	0	0	0
2019	Q1	11	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	DE	1916.93	1916.93	0.00	23997	80.31	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - India	MediaCom London	IN	5.74	5.74	0.00	915	6.27	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - India	MediaCom London	IN	16.79	16.79	0.00	2129	15.40	0	0	0	0	0
2019	Q1	12	Brand USA		Search	Google AdWords	AlwaysOn	MediaCom London	JP	714.36	714.36	0.00	8101	88.18	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Japan	MediaCom London	JP	0	0	0.00	5	0	0	0	0	0	0
2019	Q1	12			Post	Instagram	MAB	MediaCom London	AU	3415.0001	3756.50011	10.00	673267	5.51	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Google AdWords	Brand USA - India	MediaCom London	IN	279.93	279.93	0.00	2599	107.70	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Japan	MediaCom London	JP	0	0	0.00	5	0	0	0	0	0	0
2019	Q1	10	Brand USA		Search	Bing Ads	Brand USA - Japan	MediaCom London	JP	0.29	0.29	0.00	5	0	0	0	0	0	0
2019	Q1	10			Post	Instagram	Zedd Campaign	MediaCom London	IN	0	0	10.00	0	0	0	0	0	0	0

855 lines for Q1/19
alone

Objectives & KPIs –

Interest

Capture attention

Engagement

Maximum participation and/or consumption

Efficiency

Balance costs with value

Drive viewership of video content

Increase time spent with long form videos

Maximize engagement



UNITED STORIES

UNITED STORIES

United Stories was designed as a social first campaign, which has taken learnings from previous Brand USA initiatives to reach audiences with long form video content at scale on Facebook, Instagram and YouTube, while also improving engagement rates by designing a media mix which produces bespoke creative that is endemic to the distribution channel.



Impactful Video Storytelling

To drive viewership of campaign creative

Optimized Creative To Maximize Engagement

For a social-first approach

Revamped YouTube Strategy to Increase Time Spent with Longform

Which resulted in (thus far):

12 MM

Minutes of Video Content viewed since launch in January

140% Increase

In engagement rate when compared with previous campaigns

1:52

Avg. Watch Duration on YouTube

6x Increase

In average watch time on YouTube compared to other social platforms

HEAR THE MUSIC FY19

Building on the successes and learnings from FY18, we:

- Optimized creative for a narrative-based approach
- Enhanced our audience targeting efforts, and
- Drove longer form video views



Drive Viewership of Video Content

Narrative-based & Emotive to drive time spent with branded content

Enhanced Targeting Efforts to Maximize Engagement

Travel & Music Affinity

Develop Strategies to Increase Time Spent with Long-Form Video

Which resulted in (thus far):

7.9 MM

Minutes of content viewed on social

66%
more efficient
CPCV YoY

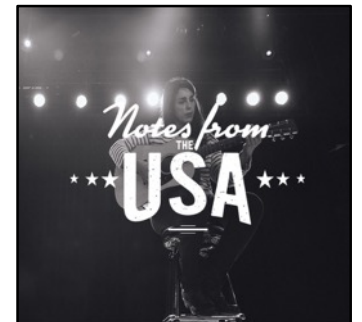
:30 > :15
Video Length
Comparison



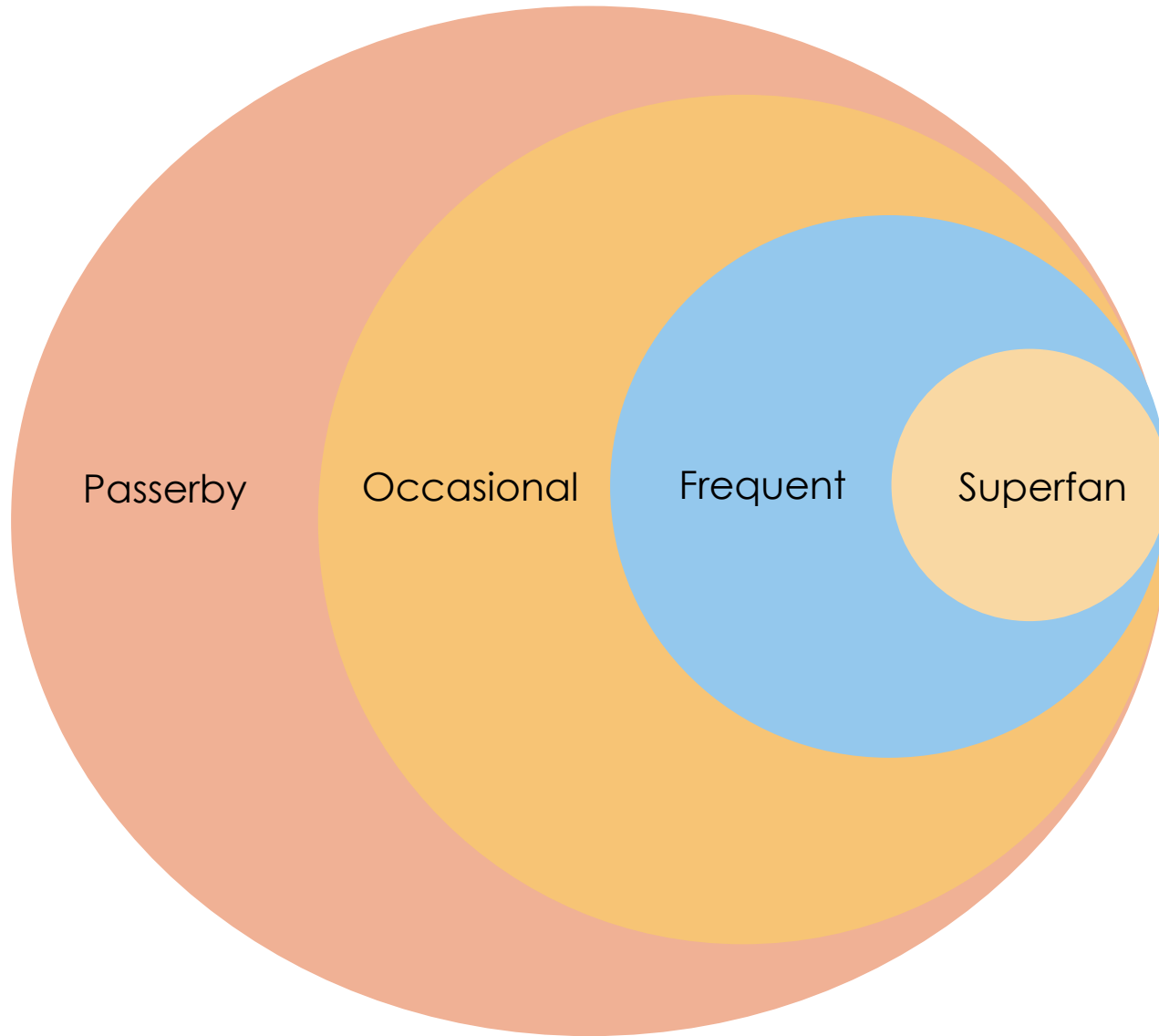
Because every place has a story.

GoUSA TV Updates

- Watch duration remains strong*
 - 47 minutes OTT
 - 2.6 minutes App
- New and upcoming content include:
 - Licensed content
 - Co-productions
 - Partner contributions
 - GoUSA TV Originals



*International monthly per user through March 31st, 2019



Audience Development

GoUSA TV

- More people watching more content for more minutes
- Apply audience segmentation to a multi-channel network approach
- Balance of distribution, acquisition and content development

GoUSA TV Updates

Focusing on the future: Multi-Channel Network

Extending viewing mediums

YouTube has a built-in audience

SEO and distribution



Takeaways

- Evolution from One size fits all to Complex Digital Ecosystem
- Video is Everywhere and Creates Emotional Connections
- Brand USA is building evangelists through video:
 - GoUSA TV Avg. Watch Time: 47 mins
 - Hear The Music & United Stories: 21MM minutes of watch time across social platforms
- Looking forward
 - Continue to engage with audiences through video storytelling
 - Optimize both creative and media towards viewership and time spent while balancing cost and value

Discussion / Q & A



Closing Remarks & Adjourn Meeting





Thank You!

Like/Follow/Share

Consumer
VisitTheUSA.com



Travel Industry
TheBrandUSA.com

