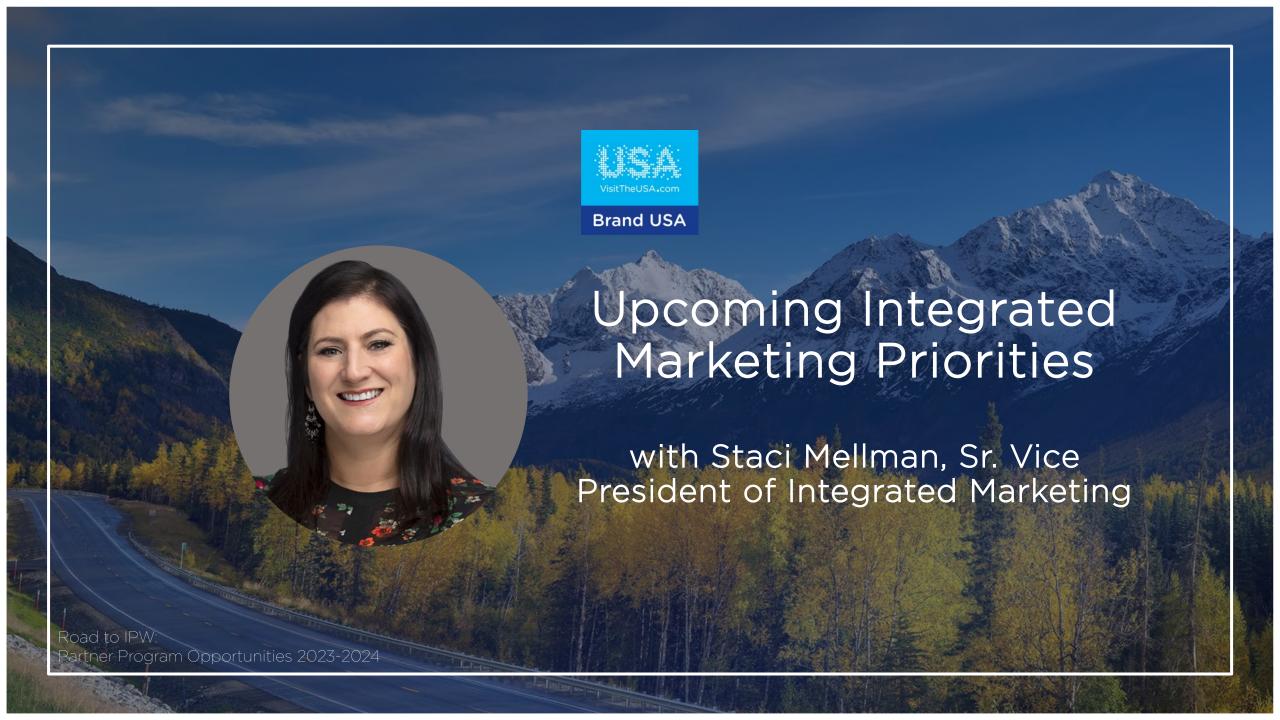
# Road to IPW: Partner Program Opportunities 2023-2024

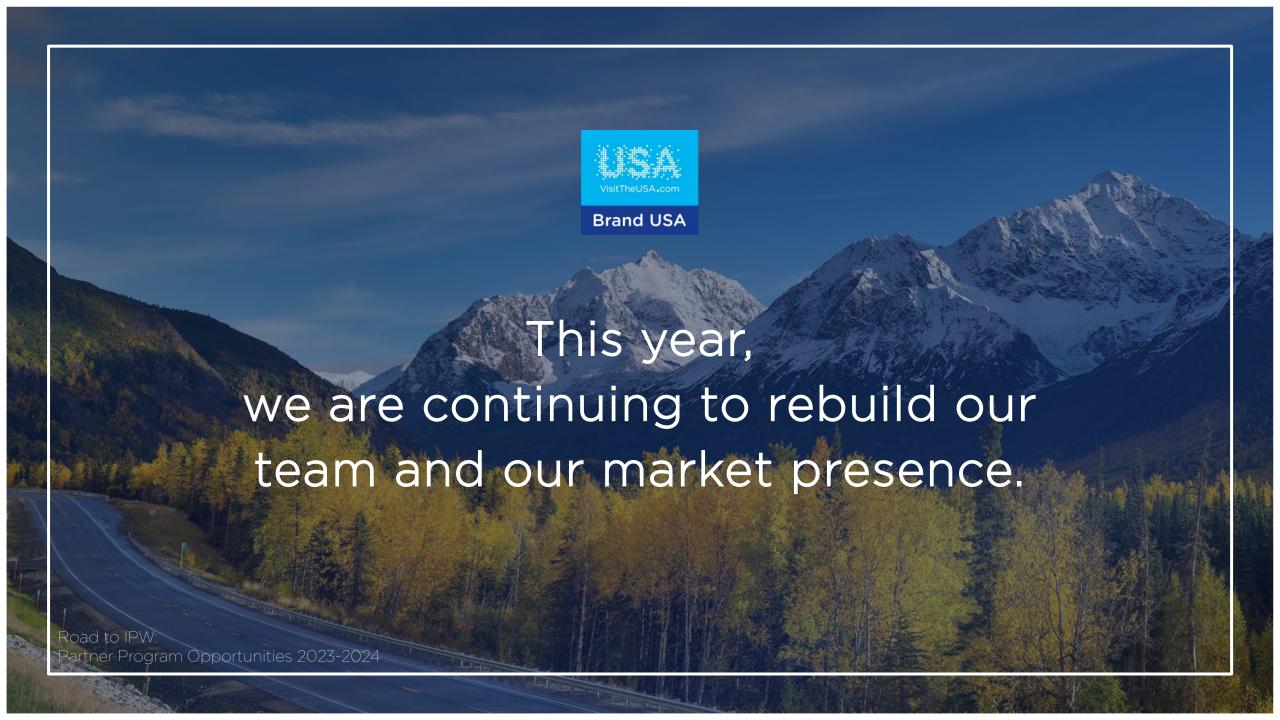
# Welcome! While you wait for us to get started, here's a few housekeeping notes:

- This webinar is being recorded and will be posted/available on our website by tomorrow.
- You will receive a link to the recording/deck tomorrow in your inbox.
- Please type your questions into the Q&A box; we will do our best to answer as many as we can electronically, but any we cannot answer will be responded to via email post-webinar.
- Not sure who to contact for additional questions? Email <u>info@thebrandusa.com</u> to be connected with the right party!
  - Thank you for being here the webinar will begin shortly!









# **Agency Roster**



#### Consumer Marketing

Media Planning + Buying: R&R Partners (NEW)

> Social Media: Edelman

Influencers: Ykone

Public Relations: Edelman + 10 in-market agencies

Content:
Odyssey + Production Partners

Brand Strategy + Creative \*\*NEW\*\*

Graphic Design: Citizen

#### Global Trade

Oceania: Gate 7

Benelux: Lieb/HB-MMGY

Brazil: Avia Reps China: Hylink

France: HB-MMGY

Germany: Lieb/HB-MMGY

India: Sartha Marketing

Italy: HB-MMGY
Japan: Avia Reps
Mexico: Alchemia

SE Asia: BrandStory
S. Korea: Iconnect

Spain: HB-MMGY

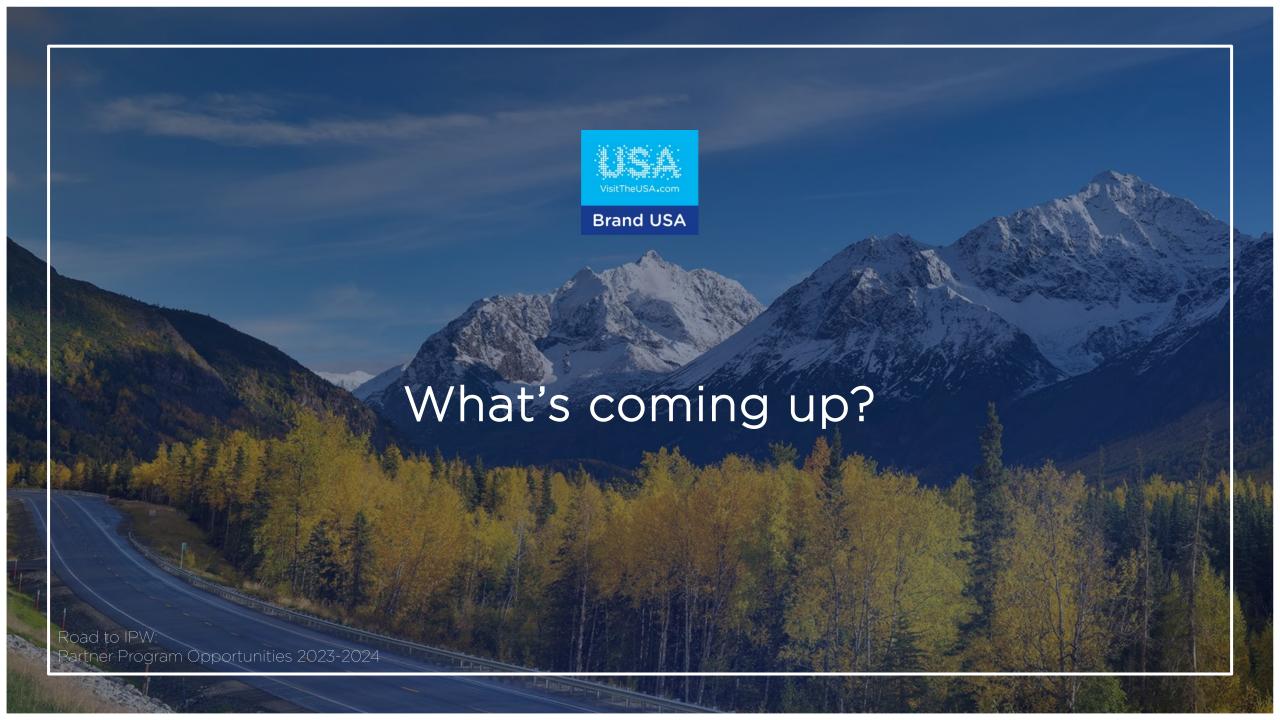
UK & Ireland: HB-MMGY

#### Partnership

Program Development & Partner
Marketing:
Miles Partnership

#### Digital Platforms

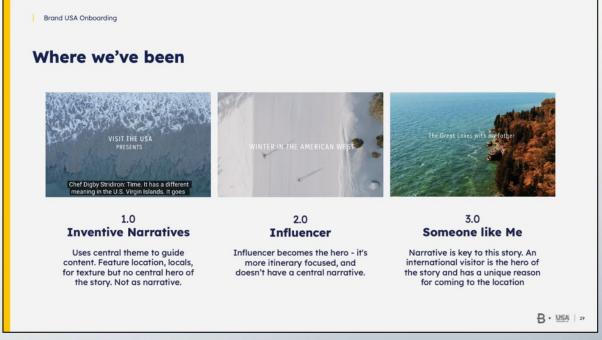
Development & Support: Miles Partnership



### United Stories: Where We've Been



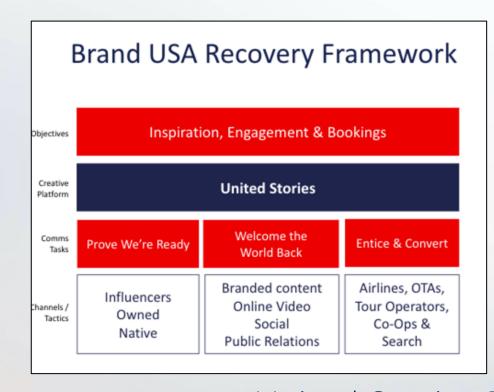




United Stories (2018 - 2021)
Strategic Focus: Inspiration >> Proximity
Creative Approach: highlight 'Many Voices'

### **United Stories: Where We've Been**







United Stories Recovery (2022) Strategic Focus: Welcoming the World Creative Approach: Find Your Story

# **Key Research**



- Nearly half (46%) of people say travel is more important to them now than it was prepandemic.
- The amount people travel is also increasing: 79% say they plan to take a leisure trip in the next year, up from 76% just a few months prior, with the average person saying they plan to take two leisure trips.
- 43% of consumers say their travel budget will be larger than last year
- 1 in 2 likely to book or have already booked an international trip in the next 12 months



Therefore, it's more important than ever to be top of mind for consumers and to raise the USA within their travel consideration set.

Road to IPW:

Partner Program Opportunities 2023-2024

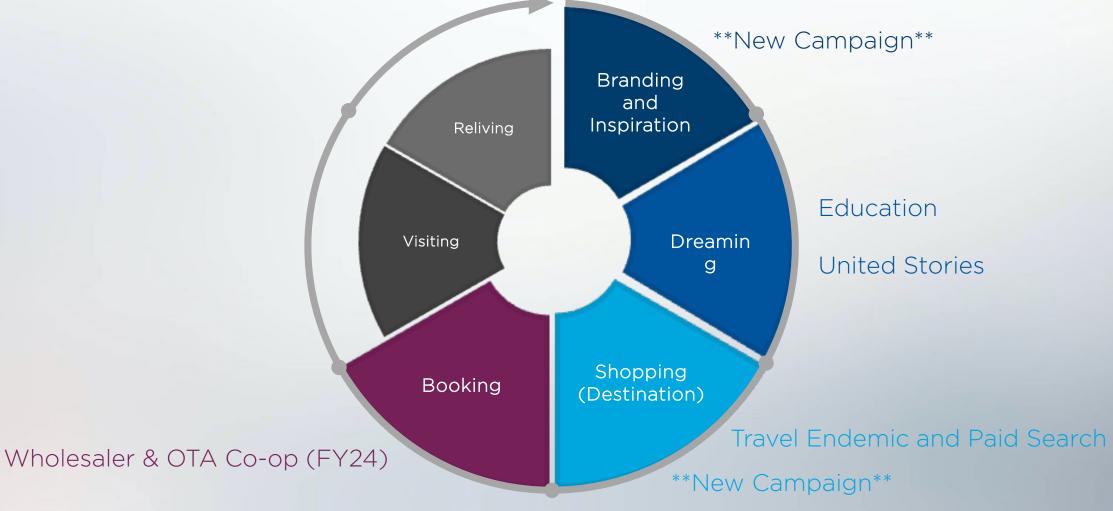
### Media Campaigns Aligned to Traveler Consumer Journey





### Media Campaigns Aligned to Traveler Consumer Journey





# **Branding and Inspirational Layer**





#### Media Objective:

Drive reach and top of mind awareness

#### Creative Opportunity:

Create campaign with broad USA messaging that creates urgency and inspires action.

### **Creative for United Stories**



The Ask: Develop new creative execution of United Stories to fulfill a robust media plan leveraging only existing footage and imagery.

Campaign Objective: to increase consideration of the USA as a travel destination; Raise the USA in the competitor set.

Target Audience: Frequent International travelers from the following markets: UK, CA, DE, MX, FR, AU, IN, SK, BR.

Messaging: ASPIRATIONAL. Lean into the pillar of Possibility.

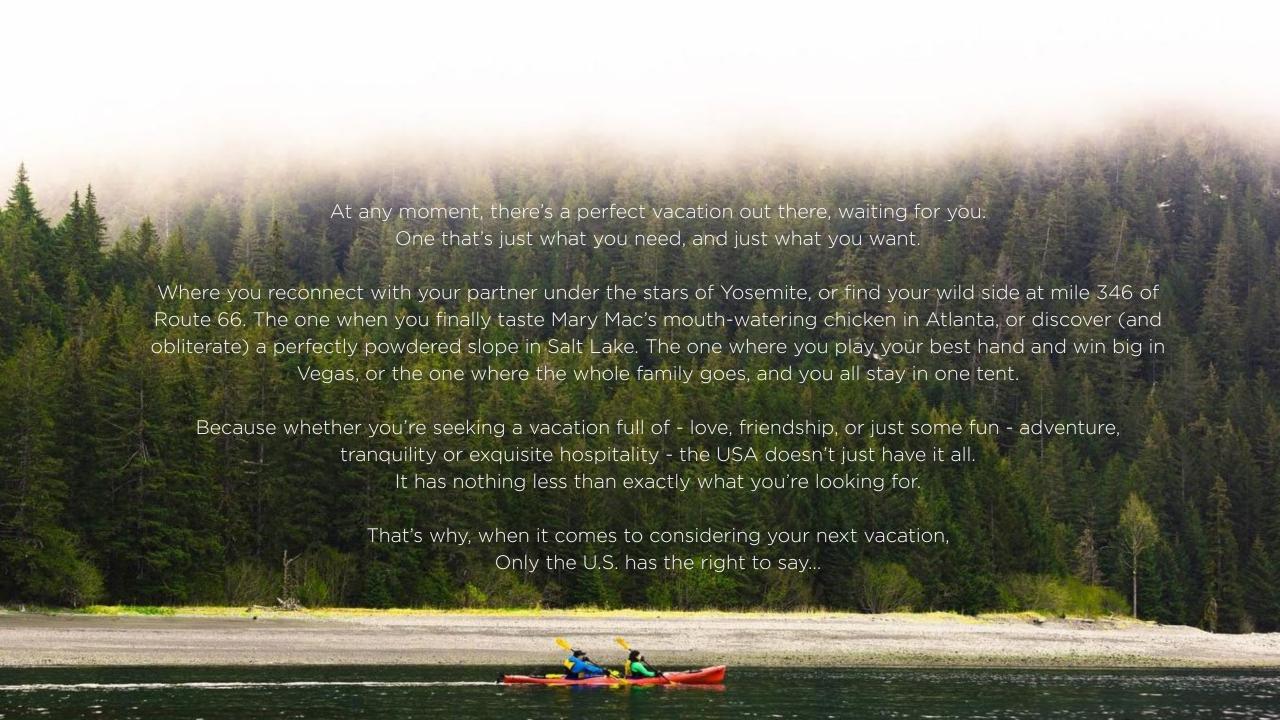
|                     | Motivations  | Triggers                       | Activities  |
|---------------------|--|--------------------------------|---|
| Glamorous Getaways  | Treat themselves, great cities, mix of cultures. Less concern for safety             | Special event - milestones     | Nightlife, local restaurants, urban sightseeing, luxury                 |
| Family Time         | Treat and visiting friends and relatives.<br>Want welcoming, diverse, and safe.      | A deal, a specific destination | Theme park, zoos, beach   |
| Outdoor Enthusiasts | Reduce stress. Want something new for every visit                                    | Destination calling            | Scenery, beach, national parks  |
| Cultural Explorers  | Learn about different cultures, vibrant,<br>unique, a place to visit again and again | Deal, destination              | Cultural landmarks, urban sightseeing,<br>historical sites, and museums |
| Excitement Seekers  | Treat, satisfy a sense of adventure  | Taking a break, milestone      | Live music, outdoor activities  |



Whoever you are.
Whoever you want to be.
Whatever experience you long for.
It's more than a possibility when visiting the U.S.
Here, you are destined to find it.

Road to IPW:

Partner Program Opportunities 2023-2024





HERE

# **Dreaming and Education Layer**





#### Media Objective:

Increase familiarity and consideration through content.

#### Creative Opportunity:

Leverage United Stories campaign to take consumers deeper into content by introducing regional, multi-state roadtrip itineraries.

UNITED STORIES Pushing the Limits of the SOUTHWEST

# **Shopping Layer**





#### Media Objective:

Increase intent through site visitation.

#### Creative Opportunity:

Feature a variety of destinations that ladder up to the "This Is Where It's At" creative for consistency and maximum impact.





바로 여기에서 즐겨보세요. ♥ Savannah, Georgia.



### Media Flighting Summary for Remainder of Year



Based on research and verified with local insights, heavy-up windows per country have been identified for branding and dreaming campaigns, whereas shopping is evergreen

|           | April | May | June | July | August | September |
|-----------|-------|-----|------|------|--------|-----------|
| Canada    |       |     |      |      |        |           |
| Mexico    |       |     |      |      |        |           |
| UK        |       |     |      |      |        |           |
| Australia |       |     |      |      |        |           |
| France    |       |     |      |      |        |           |
| Germany   |       |     |      |      |        |           |
| India     |       |     |      |      |        |           |
| Brazil    |       |     |      |      |        |           |
| Colombia  |       |     |      |      |        |           |
| Korea     |       |     |      |      |        |           |

### What's next?

In-Market Research

+

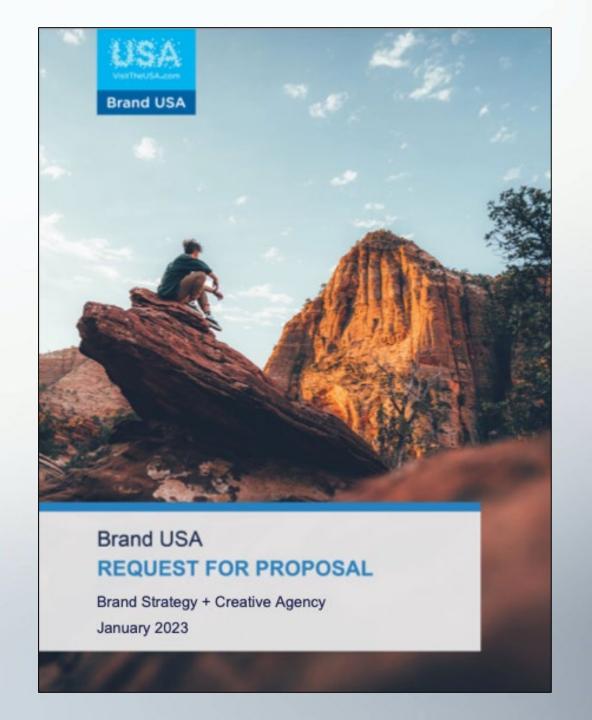
Brand Strategy

+

Creative Refresh

+

Storytelling Initiatives





# Agenda



- USA Total Inbound Visitation
- Air Capacity
- Consumer Sentiment
- Future Brand USA Research Resources

### **USA Total Inbound Visitation**



Total Visitation to the USA (in 000s) and % of 2019

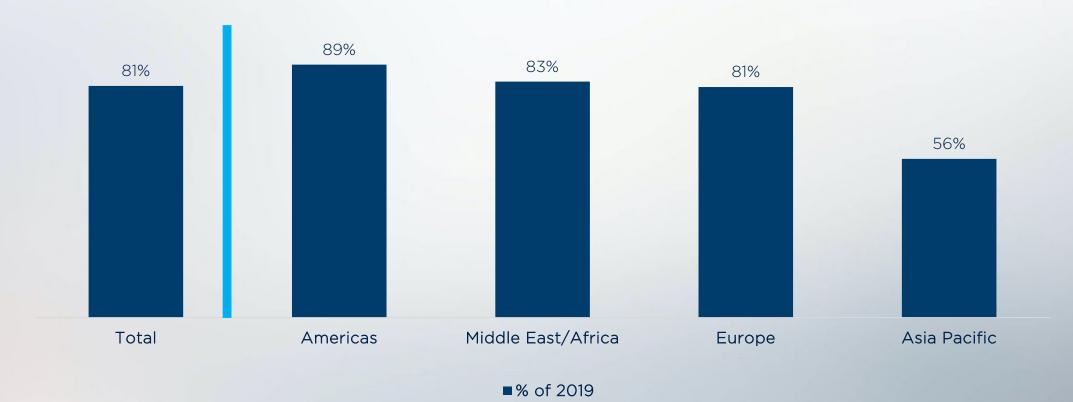


Source: Tourism Economics, as of March 27, 2023

## 2023 USA Total Inbound Visitation by Region



Total Visitation to the USA - % of 2019



Source: Tourism Economics, as of March 27, 2023

## 2024 USA Total Inbound Visitation by Market



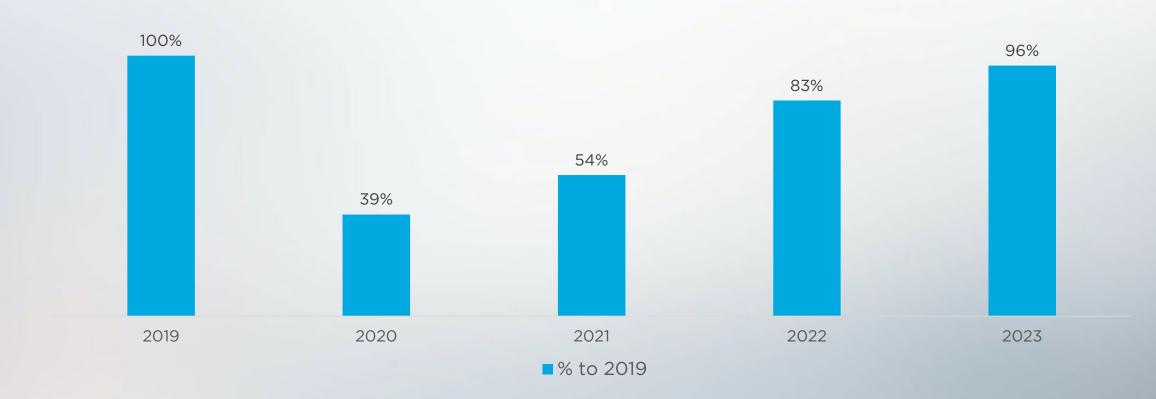
Total Visitation to the USA (in 000s) and % of 2019



Source: Tourism Economics, as of March 27, 2023

# Operating Air Capacity to the USA

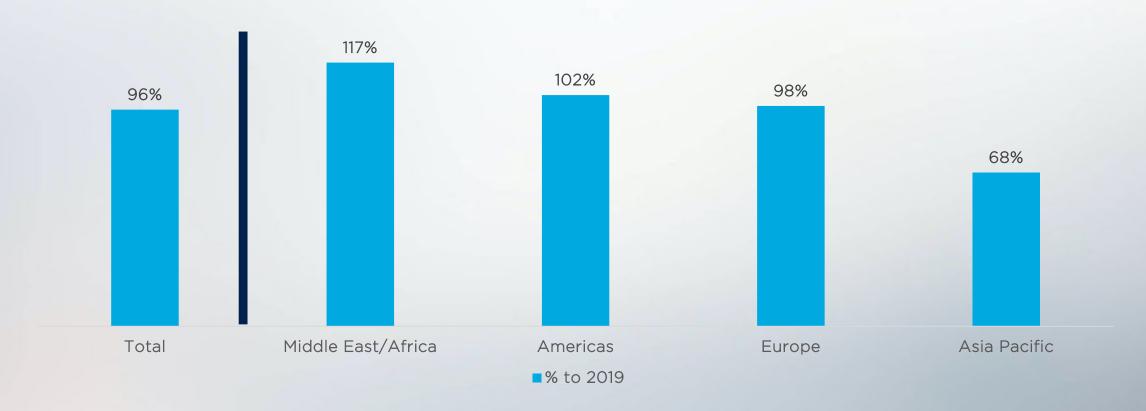




Source: Sabre, as of April 04, 2023

### 2023 Operating Air Capacity to the USA by Region





Source: Sabre, as of April 04, 2023

#### Likelihood to Travel to the USA in the Next 12 Months



% "Likely" or "Very likely"



Question: "In the NEXT 12 MONTHS, what country or countries will you visit on your international holiday(s)?" - % selected United States of America Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

### Month of Travel to the USA





Question: "In which month(s) are you planning to depart for your holiday trip(s) TO THE USA that you anticipate taking in the NEXT 12 MONTHS?" Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

# Barriers to Visiting the USA



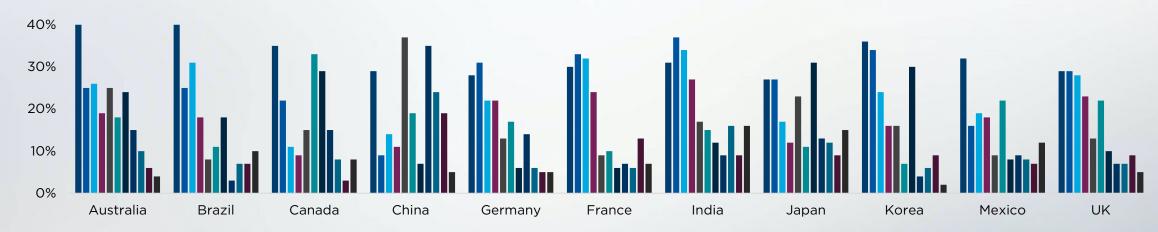


Question: "Why is the United States not a likely holiday destination for you in the next 12 months?" Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

# VisitTheUSA.com Brand USA

# Barriers to Visiting the USA by Country

Reasons for not traveling to USA in next 12 months 50%



- I want to visit other countries first
- It is a big trip that I want to plan well in advance
- ■I am concerned about my personal safety
- The currency exchange rate is unfavorable
- I am concerned about the COVID-19 situation in the USA
- I want to go for a specific event

Question: "Why is the United States not a likely holiday destination for you in the next 12 months?" Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

- ■USA has become an expensive vacation destination
- ■I want to save some money for the trip
- I have been there before
- ■I am influenced by the political climate in the USA
- I'd like to get more familiar with individual cities/states

### The USA as a Vacation Destination





Question: "When thinking about the United States, please select which characteristics, if any, describe it as a holiday destination?" Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

### **Research Updates**

### **Future Brand USA Research Resources**

- Monthly custom sentiment tracking study
- Quarterly research webinars are back!
- We want to hear from you!







### THE PARTNER ENGAGEMENT AND MARKETING TEAM

LEADERSHIP STRATEGY











PARTNER REPRESENTATION









PARTNER SUPPORT









PROGRAMS COORDINATION













Where
Brand USA
Fits In

**Regional DMOs** 

**State DMOs** 

Local DMOs

### **Partner Marketing Goals**

# Our Focus for Next Year











### **Upcoming Program Opportunities**

# **Road To IPW Webinar Series**



Road to IPW:

Market Focus 
UK Webinar

Tuesday, May 2 2pm ET

- What is Brand USA doing in the UK?
- What new research is available?
- What programs are available in the UK?

Road to IPW:
Regional/Co-Ops

Webinar

Thursday, May 4 12pm ET

- What is Brand USA's framework for cooperative opportunities (singular state and multi-state focused)?
- What kind of results and benefits do these custom opportunities bring to our partners?
- How can partners participate in Brand USA regional/co-op opportunities?

Road to IPW:
Programmatic
Webinar

Tuesday, May 16 2pm ET

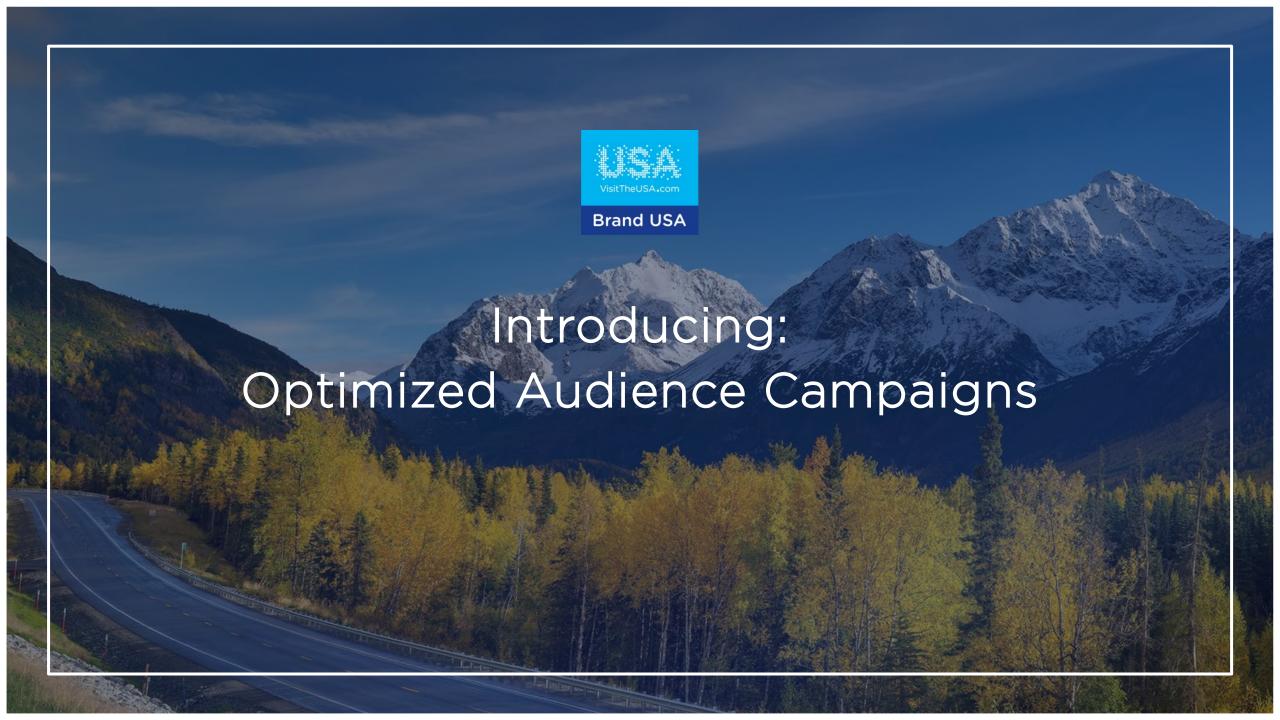
- How does programmatic media work?
- How do we use custom targeting to better meet objectives?
- How can we leverage Brand USA's curated audience to create a bigger impact?

Road to IPW:

Market Focus 
Canada Webinar

Thursday, May 18 2pm ET

- What is Brand USA doing in Canada?
- What new research is available?
- What programs are available in Canada?



### **Optimized Audience Campaign**

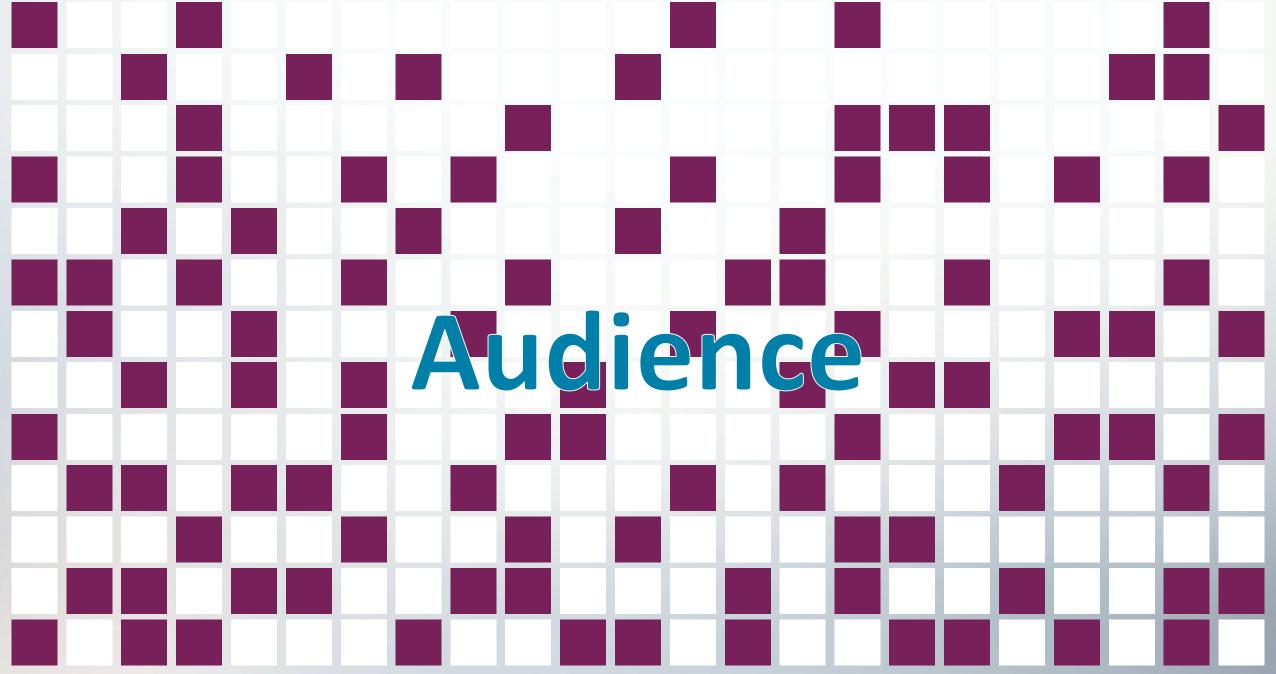
# **Program Highlights**

- Integrated digital media campaign deployed in priority international markets during periods of peak travel planning
- Reach a curated audience of hand-raisers where they are seeking information, throughout the different stages of the travel planning process
- Deepen understanding of the impact and behavior after travelers engaging with this campaign and your content
- Reporting includes measurable hotel booking data and other insights across multiple sources









Brand USA's 1st party data Brand USA's 1<sup>st</sup> party data Enhance data with additional behavioral insights

Brand USA's 1<sup>st</sup> party data Enhance data with additional behavioral insights

Monitor and measure performance

### **Optimized Audience Campaign**

# **Cohesive Consumer Journey**





### **Optimized Audience Campaign**

### Target Key Markets During Seasonal Planning Periods\*







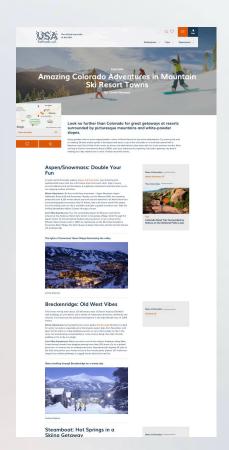


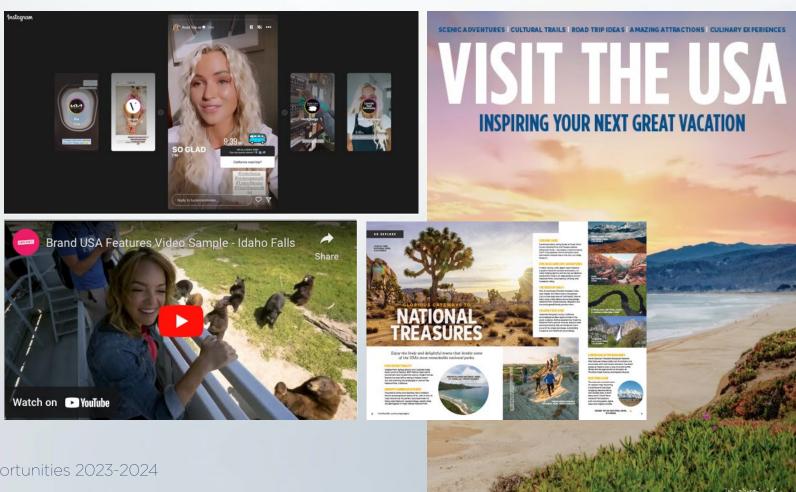


# Higher Funnel: Consumer



### Reach a Qualified Consumer Audience







Look no further than Colorado for great getaways at resorts surrounded by picturesque mountains and white-powder

Enjoy gandala rides to snow-capped peaks in some of North America's top winter destinations. Try snow sports and ice skating. Browse artisan goods in boutiques and savor a cup of hot chocolate or a local beer paired with a fabulous meal. Don't think of ski resorts as winter-only destinations; they teem with fun in the summer months. After arriving at Denver International Airport (DEN), start your adventure by exploring Colorado's gateway city before making your way toward one or more of these mountain towns.

#### Aspen/Snowmass: Double Your

In west-central Colorado, explore Aspen and Snowmass, two charming and sophisticated towns that are a 20-minute drive from each other. Stay in luxury accommodations and visit boutiques, art galleries, restaurants and bars when you're not enjoying outdoor activities.

Winter Adventures: Ski four world-class mountains - Aspen Mountain, Aspen Highlands, Buttermilk and Snowmass. Nearby, see the Maroon Bells, two amazing peaks that soar 4,200 meters above sea level and are believed to be North America's most photographed mountains. Buy lift tickets, take a ski lesson and hit the slopes. Go snow tubing, learn to ride a snowbike and take a guided snowshoe tour. Ride the thrilling Breathtaker Alpine Coaster through a forest.

Can't-Miss Experiences: Tour the outstanding Aspen Art Museum and admire artwork at the Anderson Ranch Arts Center in Snowmass Village. Stroll through the Aspen Center for Environmental Studies nature preserve, or see a show at the Wheeler Opera House, built in 1889. Go sightseeing via the Elk Camp Gondola in Snowmass Base Village, the Silver Queen at Aspen Mountain and the Summit Express

The lights of Snowmass' Base Village illuminating the valley



#### Breckenridge: Old West Vibes

This former mining town about 130 kilometers west of Denver features Old Weststyle buildings, an arts district and a variety of restaurants breweries, distrilleries and wineries. You'll welcome the laid-back atmosphere in the high-altitude town of 2,900

Winter Adventures: Surrounded by five scenic peaks, Breckenridge Ski Resort is ideal for winter recreation, especially since the long ski season lasts from November until April. Hit the trails on a dog sledding excursion or rent a fat-tire bike to ride in the sledding or for a ride in a sleigh.

Can't-Miss Experiences: Warm up next to one of the outdoor fireplaces along Main Street during a break from shopping among more than 200 stores. Go on a guided ghost tour or venture into an underground mine. Hop aboard the highest lift chair in the USA, and perfect your moves at one of four terrain parks. Explore 187 trails that range from verdant pathways to rugged terrain above the tree line.

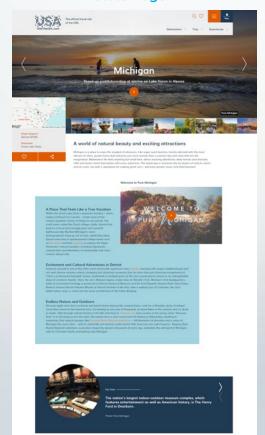


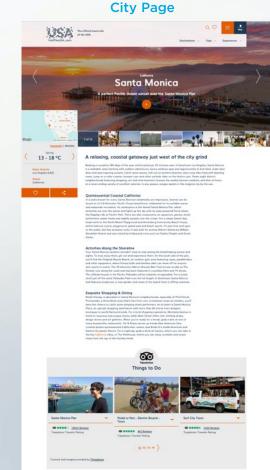
### Go Breck IF

### VisitTheUSA.com

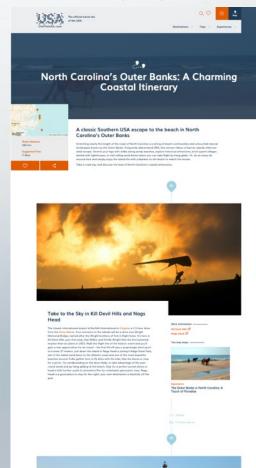


#### **State Page**





#### **Trips Page**

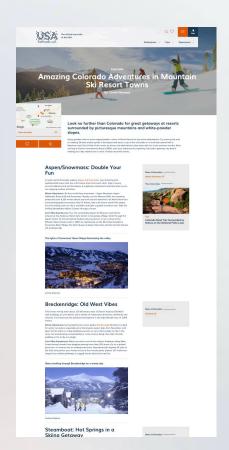


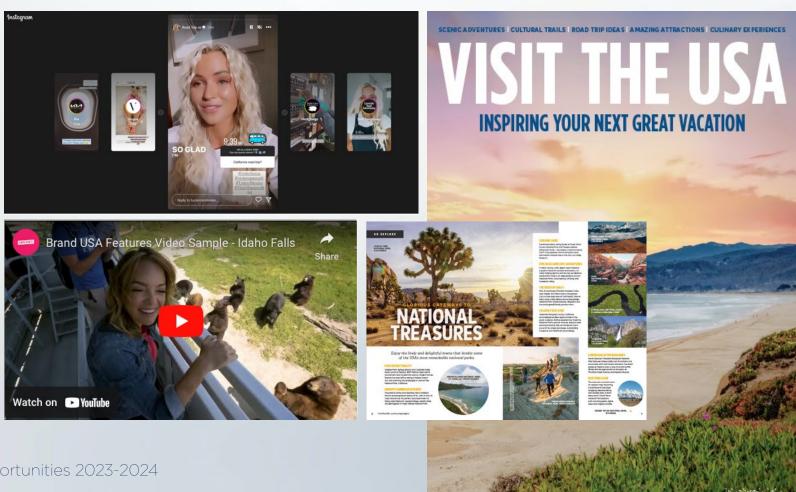
Must see places

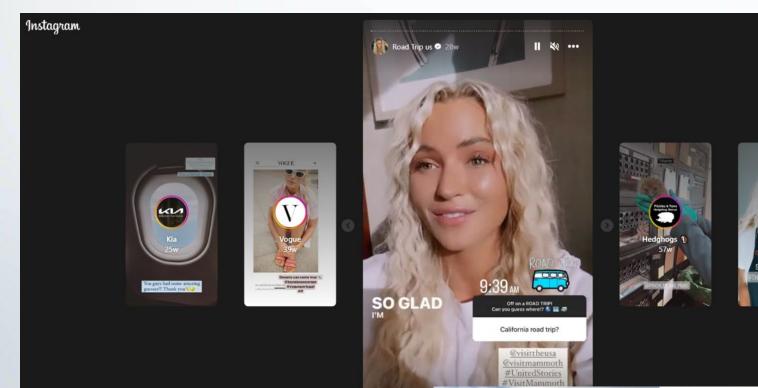
# Higher Funnel: Consumer



### Reach a Qualified Consumer Audience







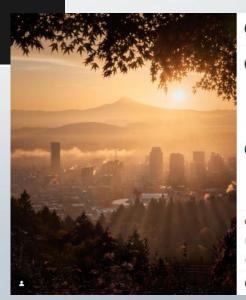


# Influencer **Program**





lucierheaume . Follow

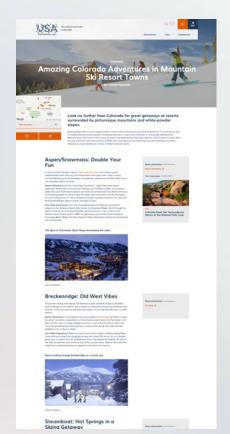


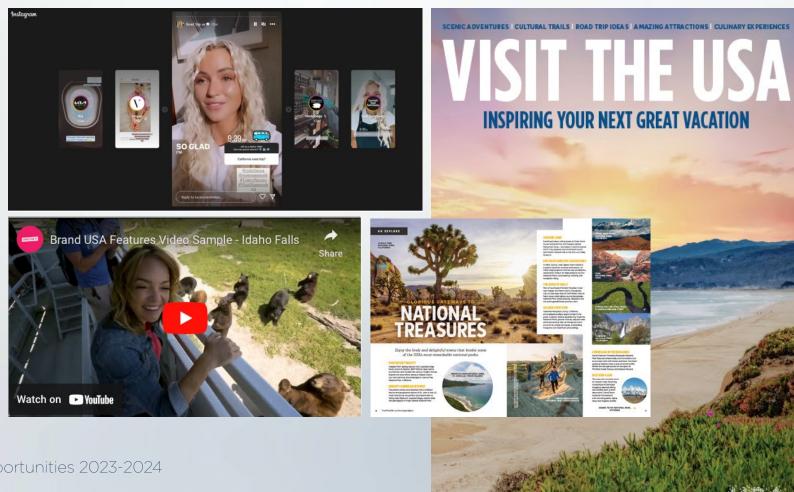


# Higher Funnel: Consumer



### Reach a Qualified Consumer Audience









# **Video Programs**

#### **FEATURES**

Experience-focused, longer-form videos



**VERTICAL SHORTS** 

Vertical video shot specifically for social media



**SOCIAL CUTS** 

Utilizes pre-existing footage for new social media assets



AT-A-GLANCE

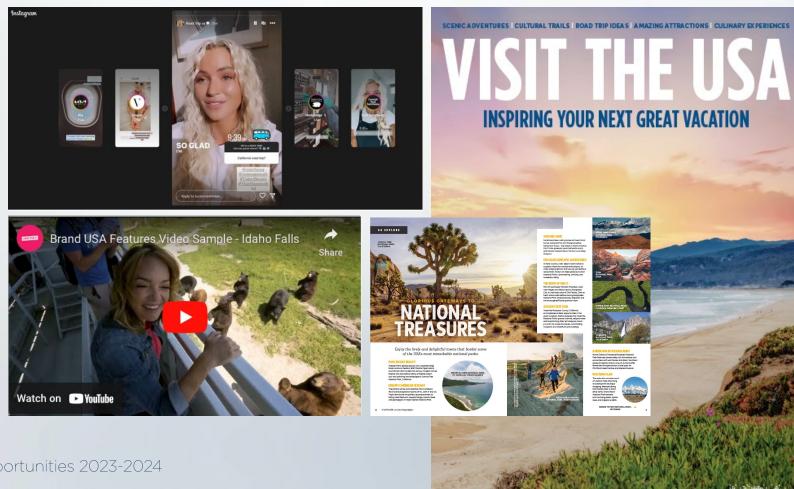
Series of short, energetic videos

# Higher Funnel: Consumer



### Reach a Qualified Consumer Audience







Enjoy the lively and delightful towns that border some of the USA's most remarkable national parks.

#### POSH DESERT BEAUTY

Greater Palm Springs boasts the Coachella Valley Music and Arts Festival, BNP Pailbas Open tennis tournament and myriad mid-certury modern homes. Explore the area before taking a Majove Desert tour and admiring the landscopes in Joshua Tree National Park; California.

#### DREAMY CARBBEAN GETAWAY

The pristine white-sand beaches, fine Caribbean flavors and exceptional reserves St. John in the U.S. Virgin Islands are the perfect accompaniment to hiking trails filled with tropical follogs, colorful birds and pero

VisitTheUSA.com/travelspotlights



#### SUN AND SAND

Sandboard down rolling dunes or Great Sand Dunes National Park and Preserve before hising Staro June – the tablest in North America. Don't miss gateway town Alamasd's scenic and historic railroad ride or the San Luis Valley Museum.

#### PIC BASECAMP, EPIC ADVENTURE:

In Kone County, Utah, desert town Konab is a qualit mecca for outdoor enthisses. Its many lodging options and low-key yet delictous restaurents male it on ideal gateway to Zlen National Park's caryoneering climbing and horseback riding.

#### THE RIVER OF GRASS

Part of southwest Florida's Paradise Coast, near Nipples and Micros Island, Everglades City is a lold-back size of Cid Florida. Dine on fresh stone crabs before touring Everglades National Park, when bobotts, ciliptores and the endangered Florida parather room.

#### OLDEN STATE ICO

Yasemite Maripasa County, California, encompasses endless apportunities in the great autabors. Before experiending Yosemite National Park's granter marvels, sequola trees and breathashing falls, let Maripasa charm youwith its unique boursques, outstanding museums and Gold Rush-ere buildings.

#### A MERICANA IN THE BADLANDS

North Daketa's Theodore Roosevelt National Pack features athewarelely rock formations and encourages with with oness and bloom. Southern gateway Medora hosts a one-of-a-kind buffer alinere and live spectabular at the open-dir Pitchfork's Stock Fondue and Medora Musical.

#### WESTERNGLAN

The nurtic-dric mountain town of Jackson Hole, Wyoming, is bustlingwith bourdaye shopping elevated dinling and cowboy base. A short drive nearth, Grand Texon Notional Park beckons with sounning peaks, alpine lokes and malestic wildlife.

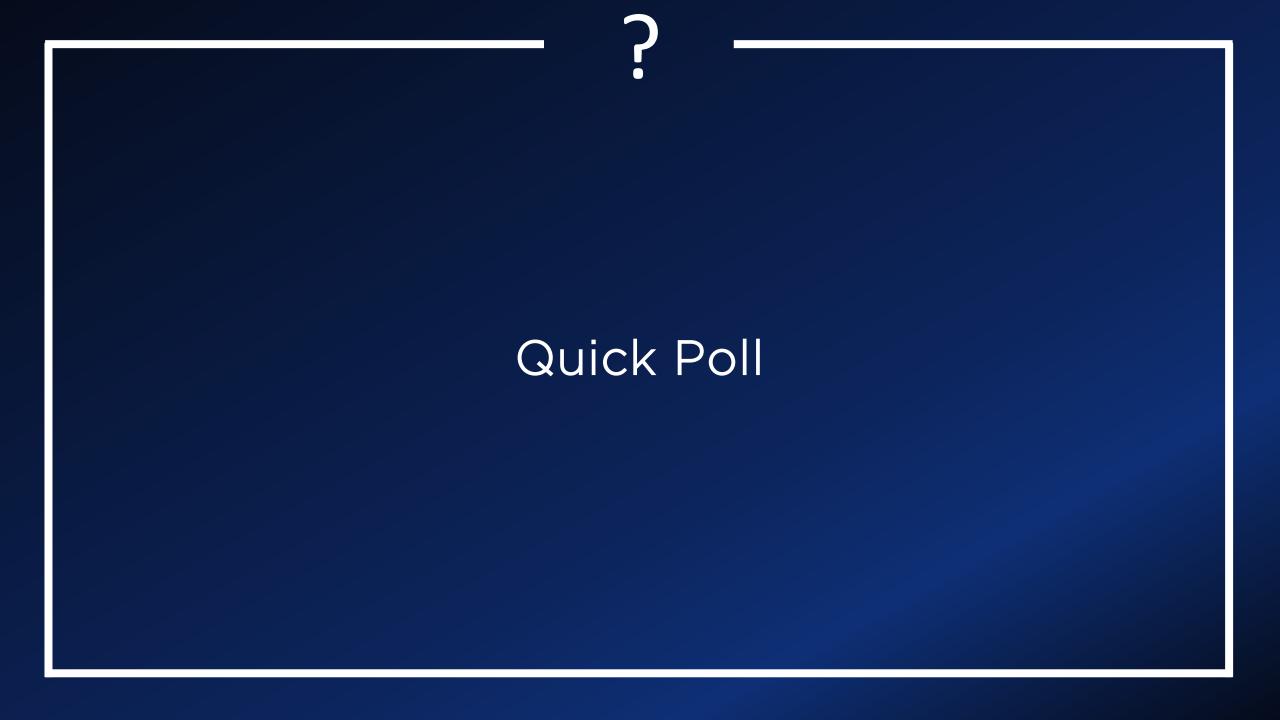


Global Inspiration

Road to IPW: Partner O. Grap Manities 2023-2024







# ?

# What market do you want Brand USA's support with the most? Please select one.

- a. Australia/NZ
- b. Brazil
- c. Canada
- d. France
- e. Germany

- f. India
- g. Japan
- h. Mexico
- i. South Korea
- j. UK/Ireland

# **Higher Funnel: Trade**



Reach Our Curated, Connected Trade Audience







**U.K. & EUROPE 2023** 



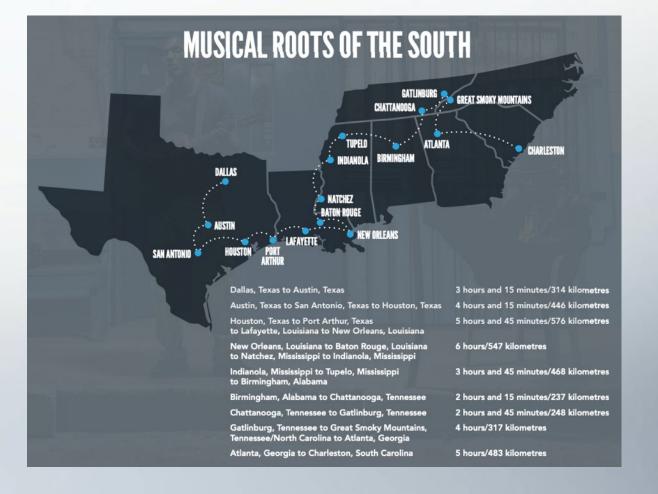


# **Higher Funnel: Trade**



### Reach Our Curated, Connected Trade Audience





# **Higher Funnel: Trade**



Reach Our Curated, Connected Trade Audience







**U.K. & EUROPE 2023** 





# **Higher Funnel: Trade**



Reach Our Curated, Connected Trade Audience







**U.K. & EUROPE 2023** 





# **Higher Funnel: Trade**



Reach Our Curated, Connected Trade Audience







U.K. & EUROPE 2023





# Sales Missions\*





<sup>\*</sup>Tentative dates; subject to change Road to IPW: Partner Program Opportunities 2023-2024





# Lower Funnel: Consumer

#### Intent & Activation

- Affinity Programs
- Programmatic Media

### Tour Operator

- Air Canada Vacations
- CANUSA
- PriceTravel
- Travelbag

### Market Specific

- Air Canada
- Rogers Media
- Televisa
- The Telegraph
- Other Opportunistic Trade Activities





### Lower Funnel: Consumer

Intent & Activation Tune in on May 16!

- Programmatic Media

Tour Operator May 18!

- Air Canada Vacations
  CANUSA
  Pritune in on May 2!
- Travelbag

Market Specific May 18!

- Air Canada
  - Tune in on May 2! Rogers Media
- The Telegraph

Road To IPW Webinar Series 2023

# **Affinity Programs**



### expedia group

media solutions

Expedia Group Media Solutions is a global travel advertising platform connecting marketers to millions of travels across the Expedia Group brands. This program offers access to Expedia Group traveler search and booking data for sophisticated targeting & reporting from awareness to conversion.



Sojern is a leading digital marketing platform that offers partners customized digital campaigns and utilizes real time travel intent data to target people who are actively searching and booking their next trip. It provides its partners with unique market insights, website analytics, and Economic Impact Reports.



Tripadvisor is one of the world's largest travel guidance platforms. Tripadvisor offers partners the ability to reach higher funnel travelers through their booking agnostic platform. Partners can utilize all available targeting methods on TripAdvisor's family of domains to encourage travel to your destination.



Adara is a travel technology company that provides destinations with data and measurement tools to boost engagement. Adara offers destinations data-driven travel-intent digital marketing campaigns with timely search and booking insights.

### lastminute.com

lastminute.com is a trusted European OTA operating in 40 countries (17 languages) with 60 million unique users per month. Partners can target specific travel audiences using their first-party data and utilize their digital media campaigns to raise awareness and drive sales to destinations.

### hotelbeds

Hotelbeds is the world's leading B2B travel distributor that contracts with hotels and activities in almost every destination and distributes them through their network. This program offers partners customized B2B campaigns focused on educating and incentivizing their travel advisors to become destination experts who influence the end consumer.

# CANUSA (Germany)

#### **Urlaubstracker Placement**



#### FRÜHBUCHER

Im Herbst mit dem Camper durch die USA: 15 Tage an der Westküste inkl. Flug & Camper nur 1.189€ p.P.

vom Dienstag, 5. Juli 2022

Die Westküste entlang in Eurem eigenen Camper, diesen Traum könnt ihr Euch noch in diesem Jahr erfüllen. Sichert Euch Jetzt die besten Preise und Camper für Eure USA Wohnmobil Reise mit Flug! Heute werden Wünsche wahr und das zum günstigen Preis von nur 1.189 © pro Person, wenn ihr zu...

#### Scratch Ad



### Instagram Story



### CANUSA Beitrag erstellen

Beitrag erstellen OI Live

"Big Sky Country"

Montana beheimatet nicht nur den beeindruckenden Glacier National Park, der als "die Krone Nordamerikas" mit zahireichen Gletschem und der Panoramastraße "Gönig to the Sun Road" begeistert, sondern auch einen Teil des Yellowstone National Parks. Hier tummein sich Bisons, Bären und Elchen neben syukenden Gesyisten und tosenden Wasserfälten. El Ragdrig durch den US-Bundesstaat führt vorbel an verlassenen Goldgräber-Camps und charmanten Western-Städten, die voller Nostaigie an Vergangenes erinnern. Von Mal bis Oktober finden übrigens aufregende Rodeos und PowWows der Native Americans statt, die die Kultur von Manan hauthan Vermittein. § "Er Native Americans statt, die die Kultur von Montana hauthan Vermittein."

Lasst euch hier von Montanas Vielfalt inspirieren. https://tinyurl.com/montana-gaw.

Wart ihr schonmal in Montana? Dann schreibt uns euer Highlight in die Kommentare. 😛

The Great American West - Germany

Credit: Montana Office of Tourism and Business Development





#### **Facebook Post**

#### Pinterest Ad



#### **Exclusive Newsletter**



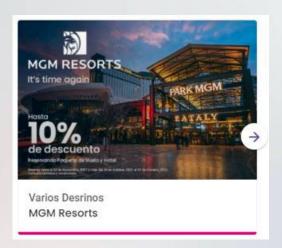
UNVERGESSLICHE AUTOREISE DURCH KENTUCKY

# PriceTravel (Mexico)

#### **Push Notifications**



#### Banner



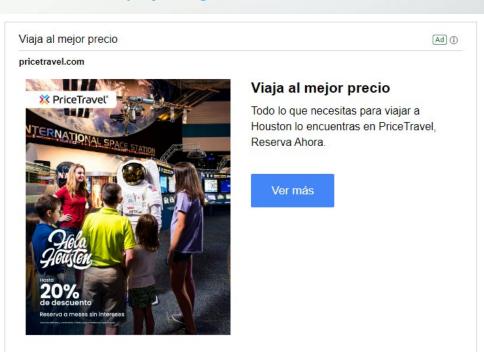


#### **External Website**

#### **Social Media**

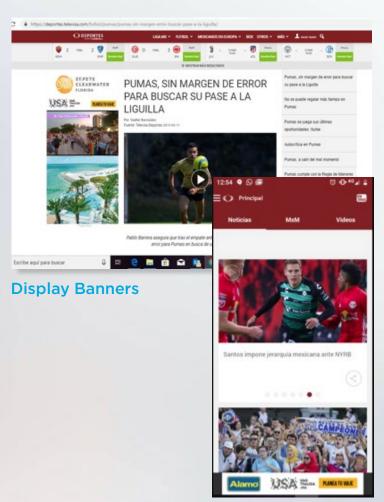


#### **Search and Display Google**



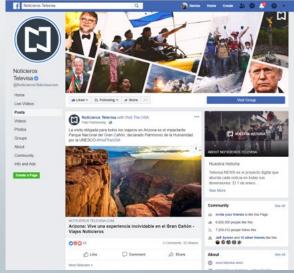
# Televisa (Mexico)





#### Visit the USA Content Hub





**Social Post** 

### \*\*NEW GERMAN PROGRAM ALERT\*\*





# **Opportunistic Trade Activities**

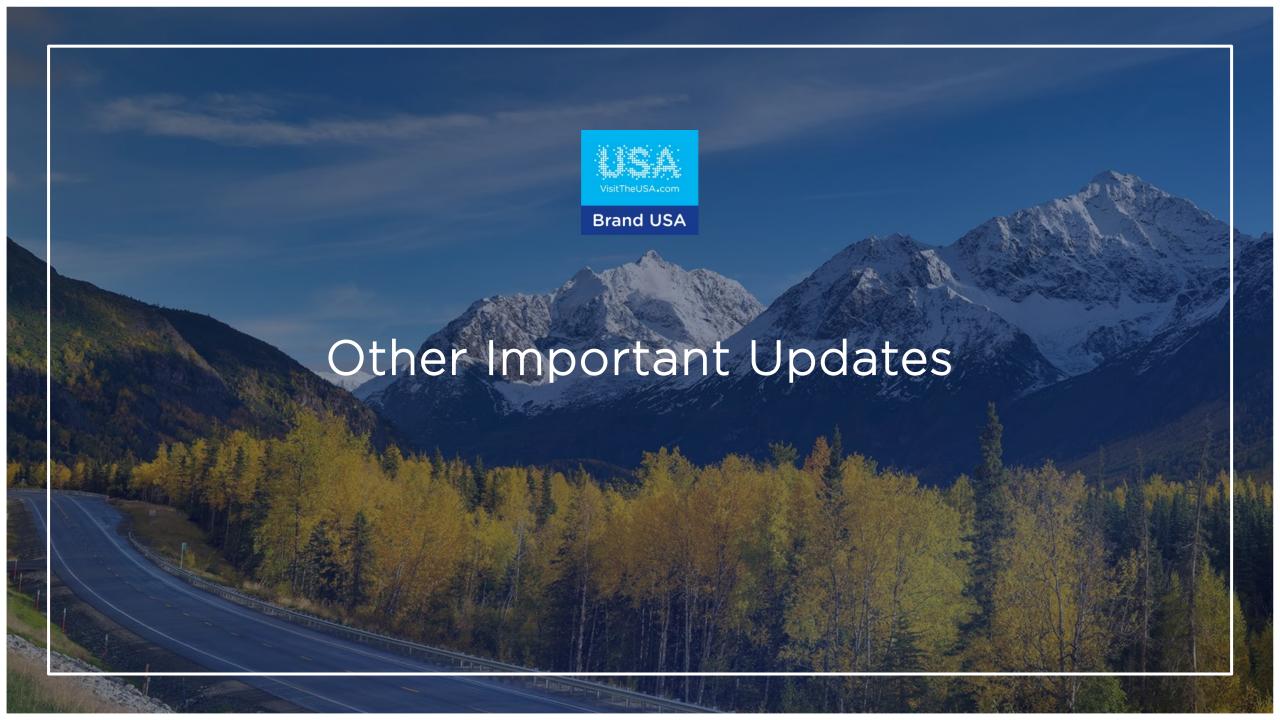




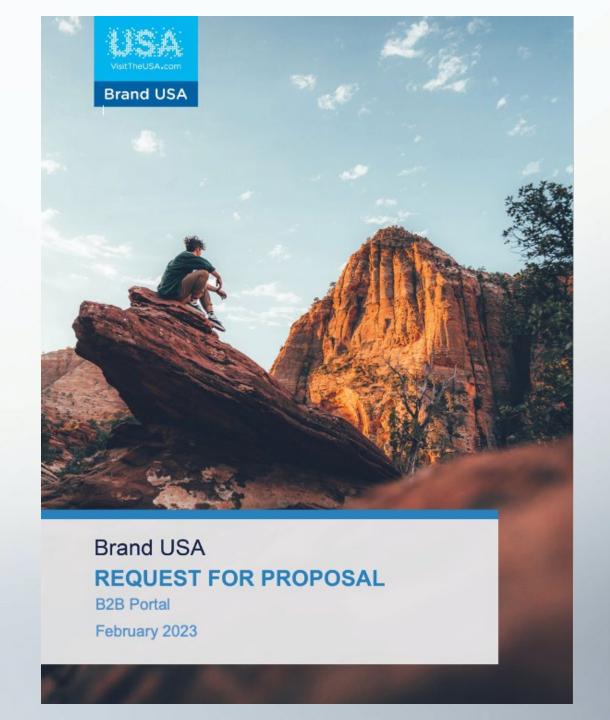




+ In-Market Road Shows



# Partner Portal Update



### Last but not least...

# Mark Your Calendars!\*



| April<br>2023   | May<br>2023   | June<br>2023  | July-August<br>2023   | 2023   | January<br>2024        | February<br>2024                         | March<br>2024                  | 2024                    | 2024                                    |
|---|---|---|---|--|------------------------|--|--------------------------------|-------------------------|---|
| 4/18: BOD Meeting  4/19-26: UK & Ireland MegaFam (NY, MA, CT, PA, MD, D.C., GA, AL, IL, MI, CA, AZ, NV)  Korea: Roadshow with Mode Tour | 5/2: UK Webinar  5/4: Co-Op/ Regional Webinar  5/16: Programmatic Webinar  5/18: Canada Webinar  5/21: Market Education Sessions @IPW | 6/6-14: AUS/NZ<br>Mega Fam with<br>Hawaiian<br>Airlines (HI, CA,<br>TX, OR, WA,<br>NV, UT, MA,<br>NY) | 7/15: GoUSA TV Storytelling Awards submissions due  July: Japan & South Korea Sales Mission  August: Korea: Roadshow with Hana Tour | 10/16-19:<br>Brand USA<br>Travel Week in<br>London | India Sales<br>Mission | Mexico Sales<br>Mission<br>Australia B2B | South America<br>Sales Mission | Canada Sales<br>Mission | Japan & South<br>Korea Sales<br>Mission |

