

Road to IPW: Canada Market Outlook

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 live or electronically, but any we cannot answer will be responded to via email post-webinar.
- Not sure who to contact for additional questions? Email

info@thebrandusa.com to be connected with the right party!

Thank you for being here – the webinar will begin shortly!





An Introduction

with Cat Reith

Sr. Director of Partner
Marketing Programs

Road to IPW:
Canada Market Outlook

An Introduction

Agenda



- Housekeeping
- A Canada Research Update, with Chelsea Benitez
- A Brand USA Canada Consumer Update, with Susan Zachar
- A Brand USA Canada Trade Update, with Casey Canevari
- Brand USA Program Opportunities in Canada, with Julie Paulson



Chelsea Benitez, Director of Consumer Research



Road to IPW:
Canada Market Outlook

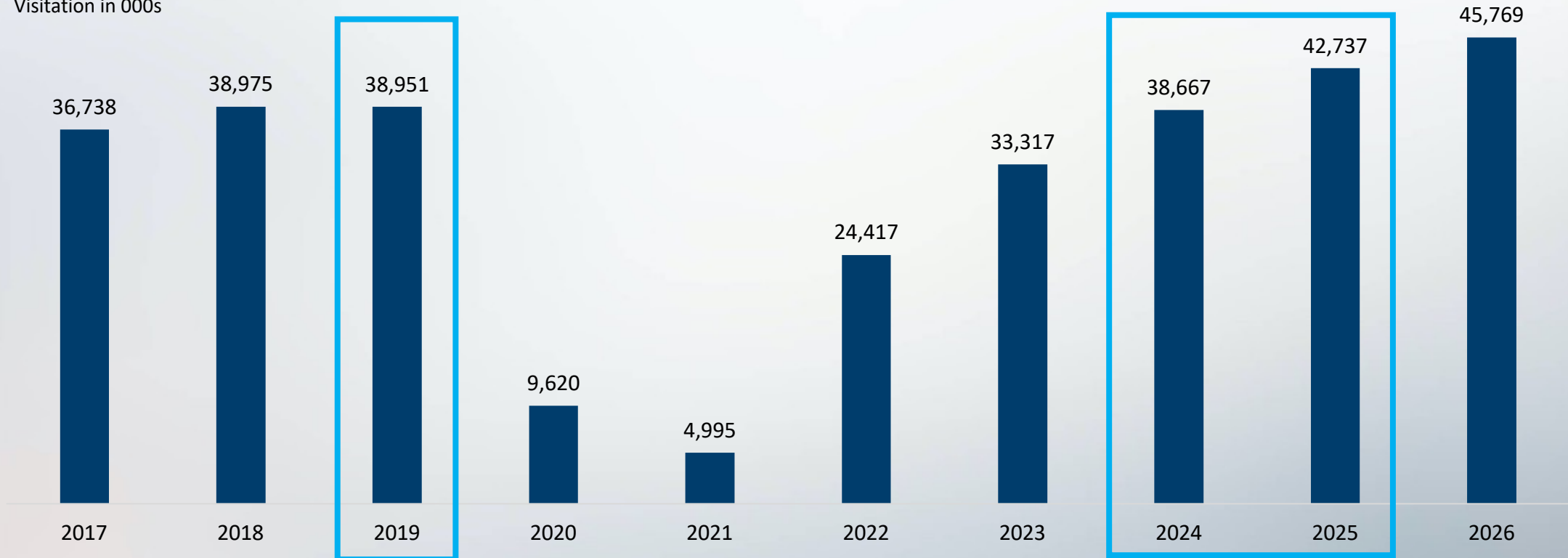
Agenda



- Global Outbound & USA Inbound Travel and Spend
- Air Capacity
- Consumer Sentiment

Canada: Global outbound travel

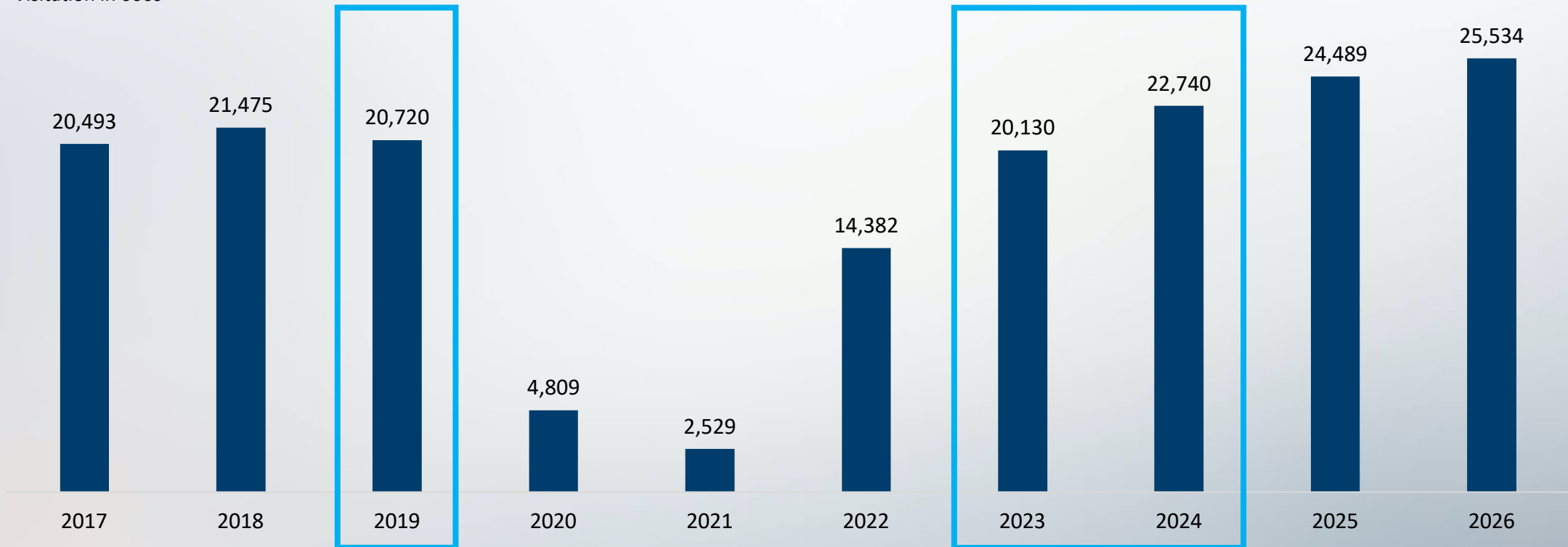
Visitation in 000s



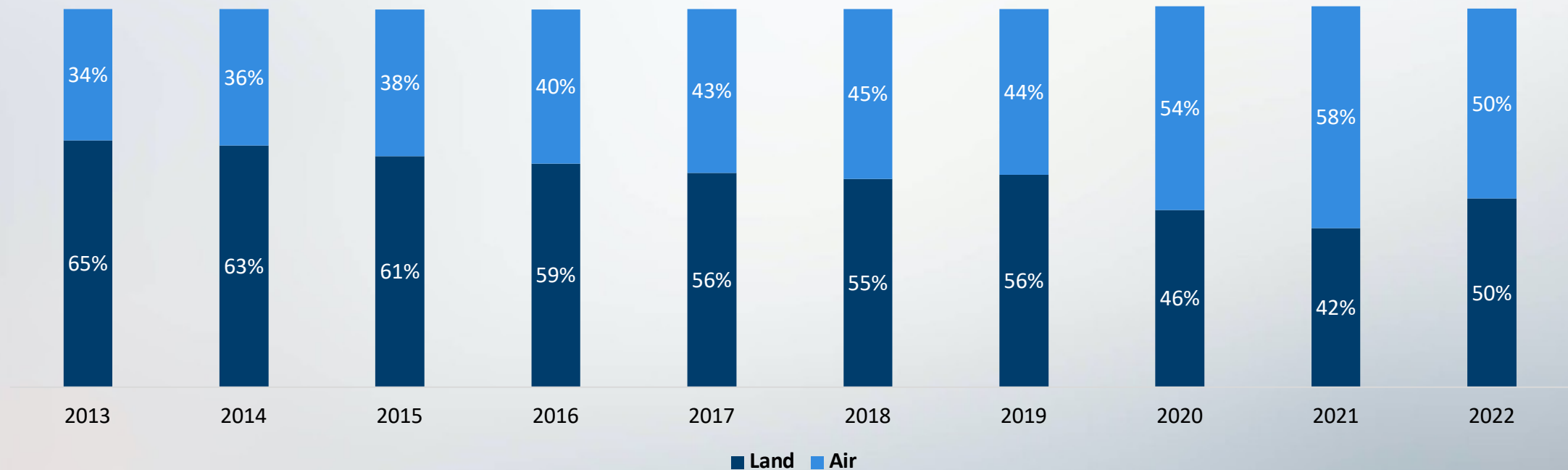
Canada: USA inbound travel



Visitation in 000s

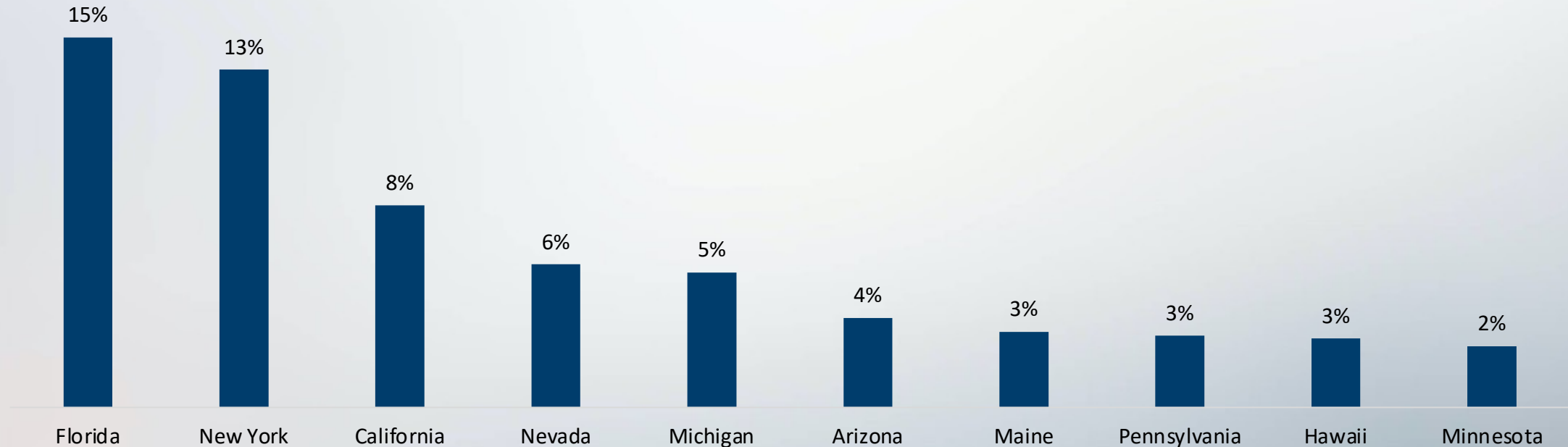


Canada: USA inbound travel by arrival type



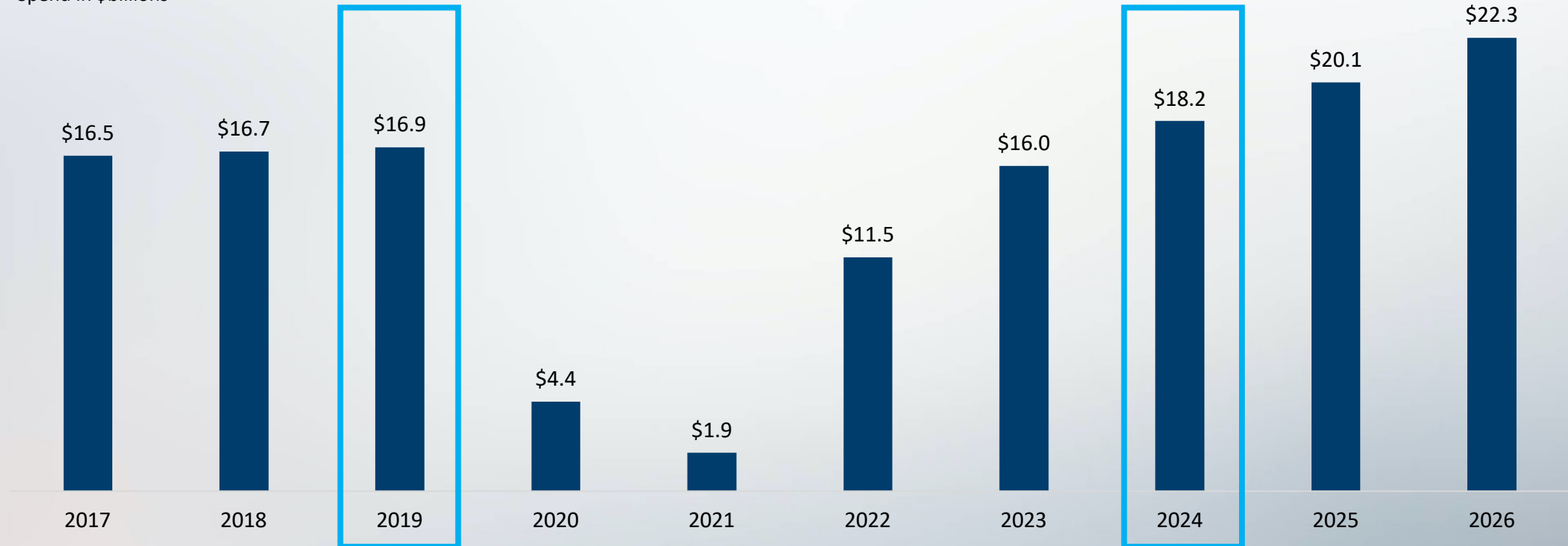
Canada: USA inbound travel – Top 10 states

% of 2022 Visitation



Canada: USA inbound travel spend

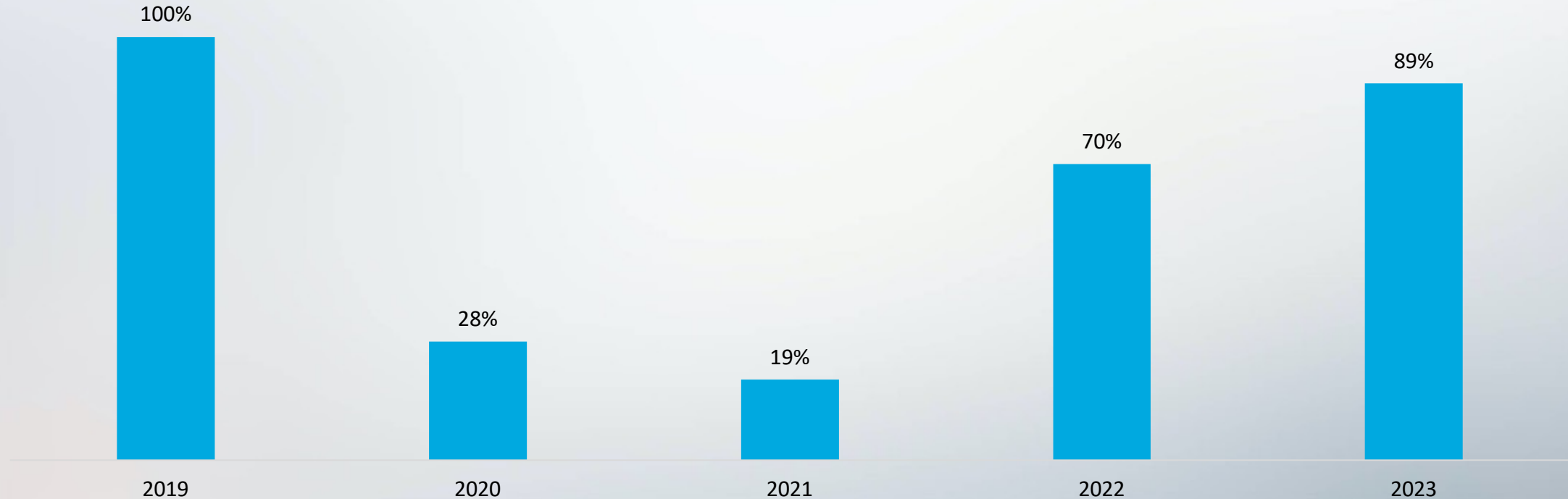
Spend in \$billions



Canada: Operating air capacity



USA Inbound Operating Air Capacity from Canada
% of 2019



Canada: 2023 Operating air capacity

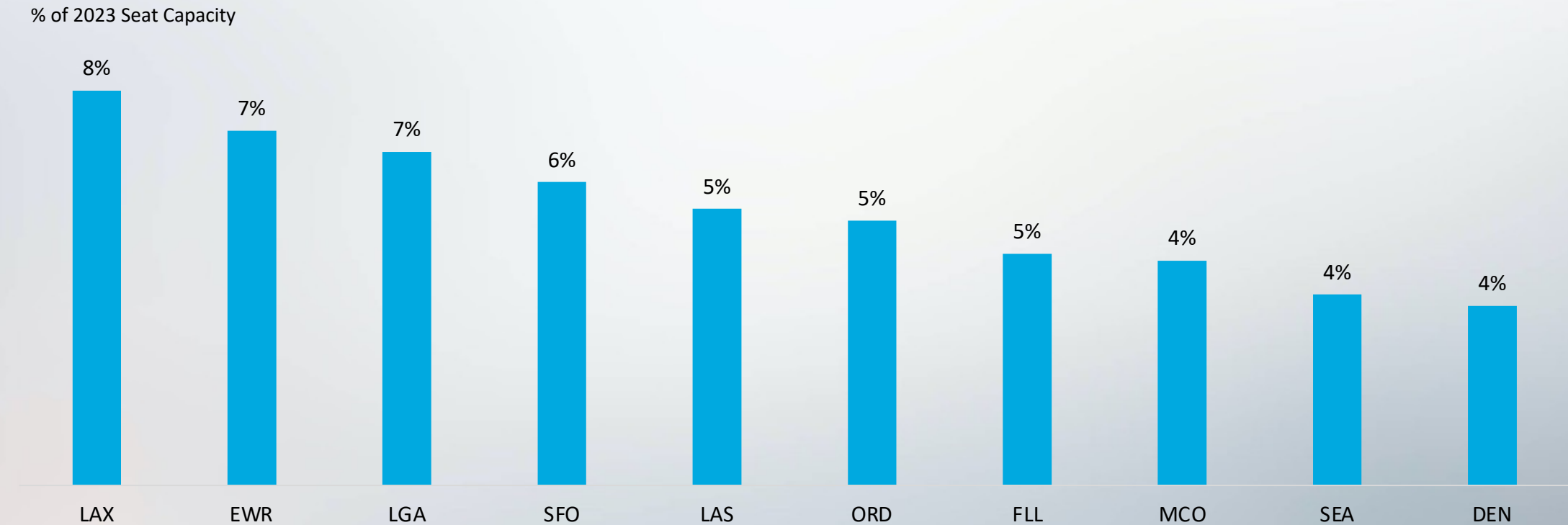
USA Inbound Operating Air Capacity from Canada
% of 2019



Source: Sabre, May 2023
Brand USA's Road to IPW: Canada Market Outlook

Road to IPW: Canada Market Outlook

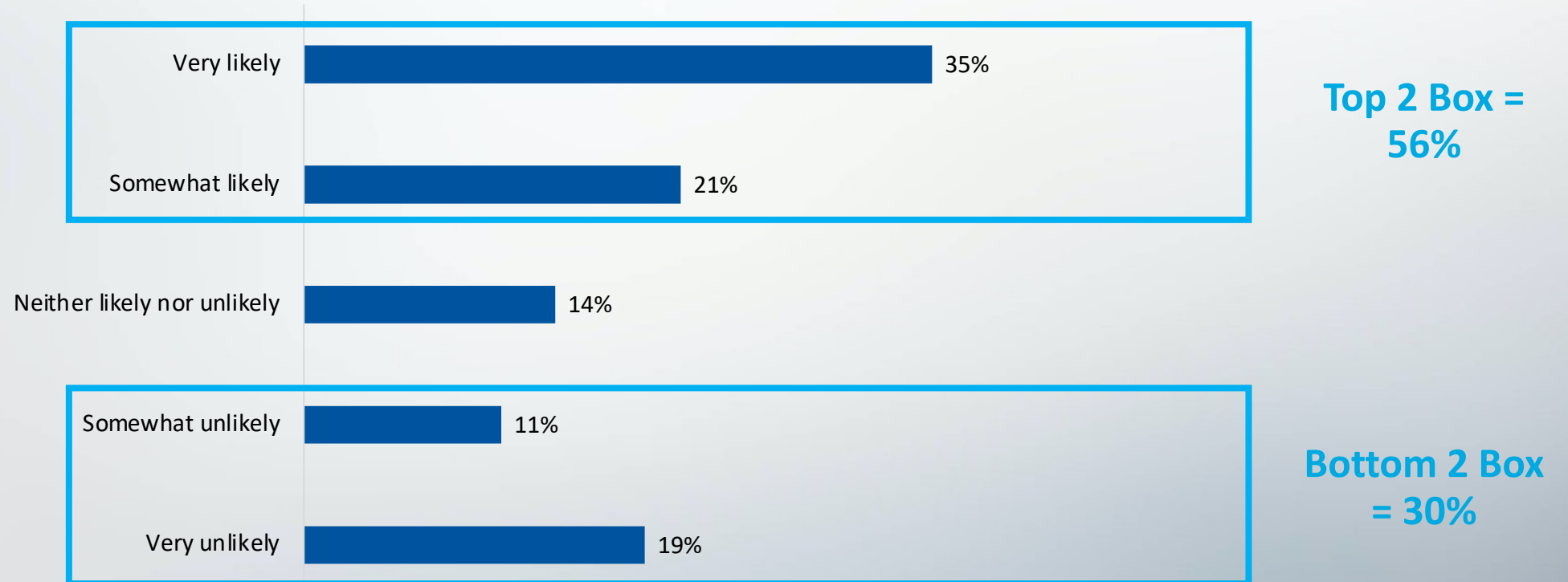
Canada: 2023 Operating air capacity – Top 10 arrival airports



Source: Sabre, May 2023
Brand USA's Road to IPW: Canada Market Outlook

Road to IPW: Canada Market Outlook

Canada: Likelihood to take an international holiday in the next 12 months



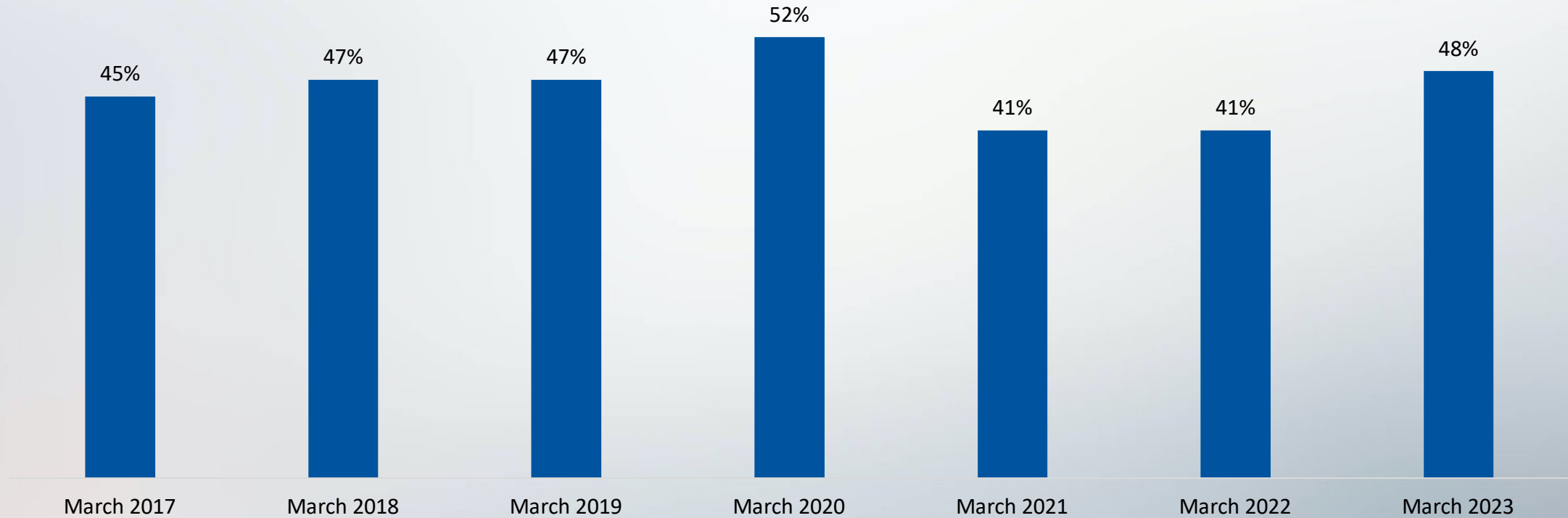
Question: How likely are you to take an international holiday in the NEXT 12 MONTHS?

Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

Brand USA's Road to IPW: Canada Market Outlook

Road to IPW: Canada Market Outlook

Canada: Likelihood to travel to the USA in the next 12 months

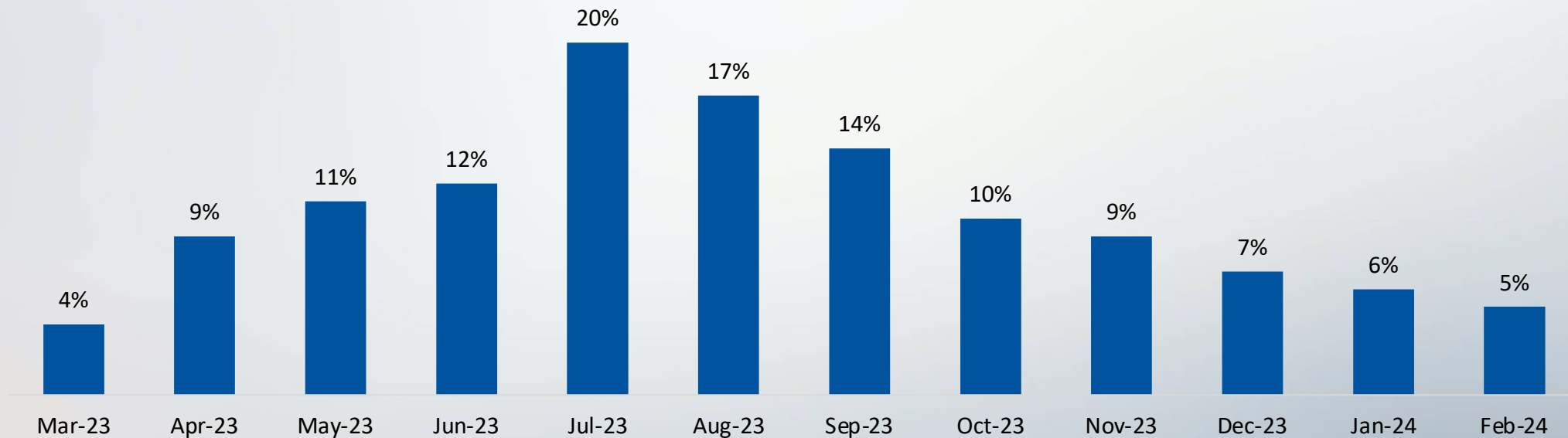


Question: In the NEXT 12 MONTHS, what country or countries will you visit on your international holiday(s)? Please select all that apply.

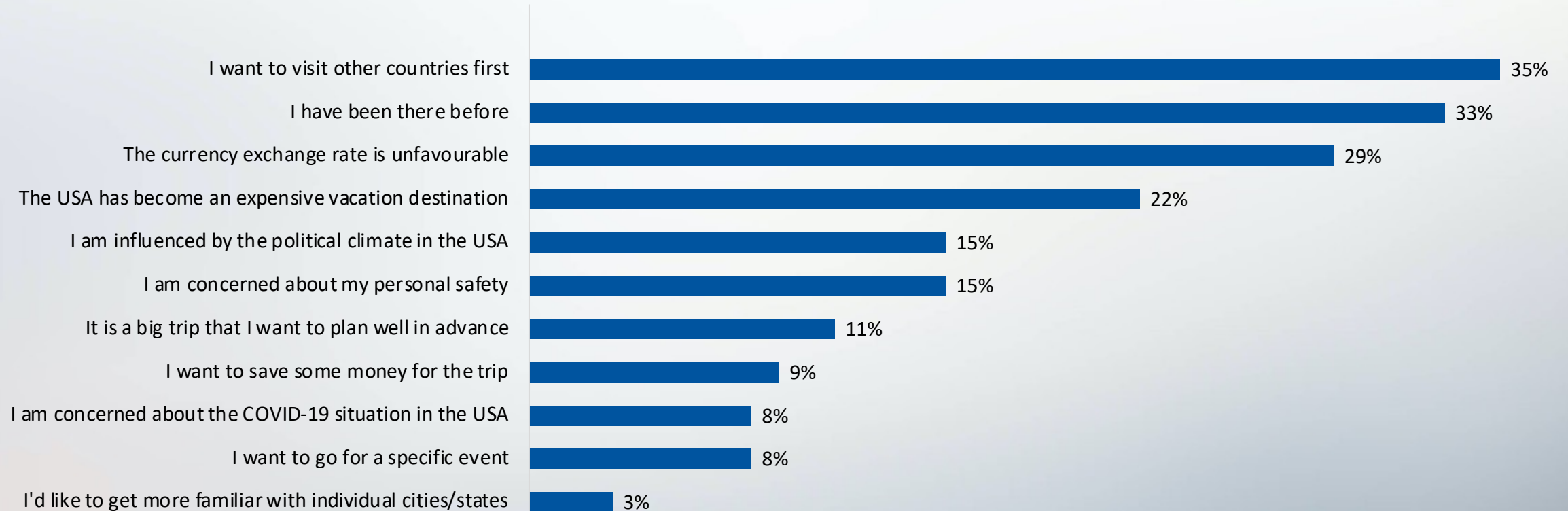
Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

Brand USA's Road to IPW: Canada Market Outlook

Canada: Month of travel to the USA



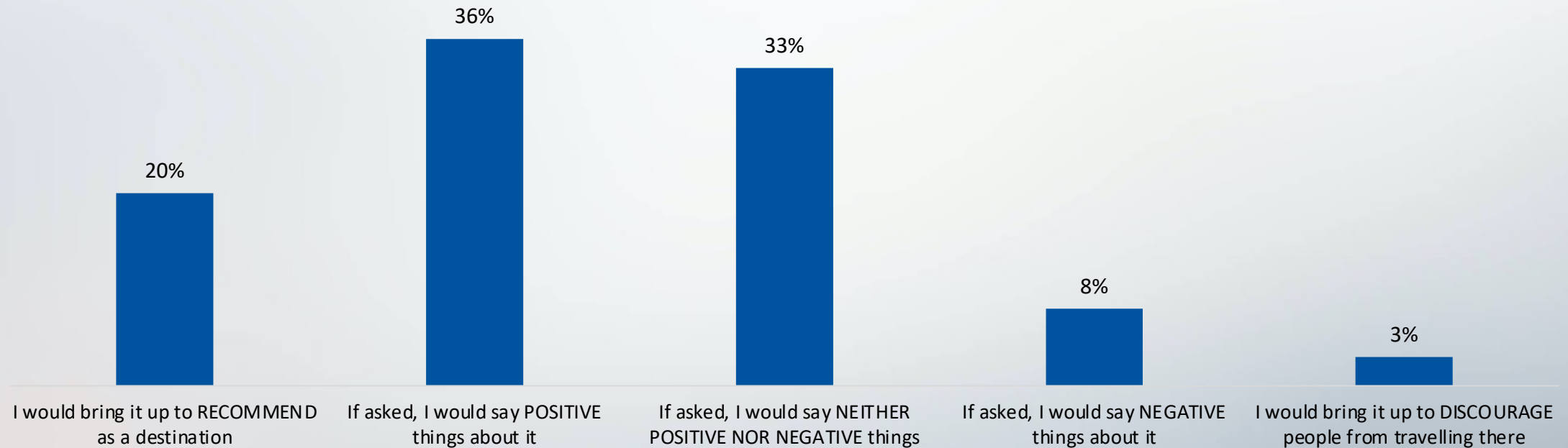
Canada: Deterrents to visiting the USA



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
Brand USA's Road to IPW: Canada Market Outlook

Canada: Attitude towards the USA



Question: If a friend or relative were discussing a future holiday destination with you, which statement would BEST DESCRIBE YOUR ATTITUDE TOWARDS THE UNITED STATES?

Source: Brand USA/Big Village, Quarterly Custom Study, March 2023

Brand USA's Road to IPW: Canada Market Outlook

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Quick Poll

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What region in Canada are you most interested in targeting?

- a. Nationwide
- b. Ontario/Quebec
- c. British Columbia/Alberta
- d. Manitoba/Saskatchewan



Consumer Updates with Susan Zachar, Senior Director, Integrated Marketing



Road to IPW:
Canada Market Outlook

Consumer Updates

Integrated Marketing Strategy for Canada



Objective: Maintain or increase share/volume

Aligning our Media and Messaging Strategy to the Consumer Journey





**THIS IS WHERE
ADVENTURE'S AT**

Where We'll Be



Vendors & Channels across all media layers:

- YouTube
- Sojern
- Expedia
- Meta
- Programmatic
- Google
- TripAdvisor
- BBC
- Influencers

Consumer Media Timing

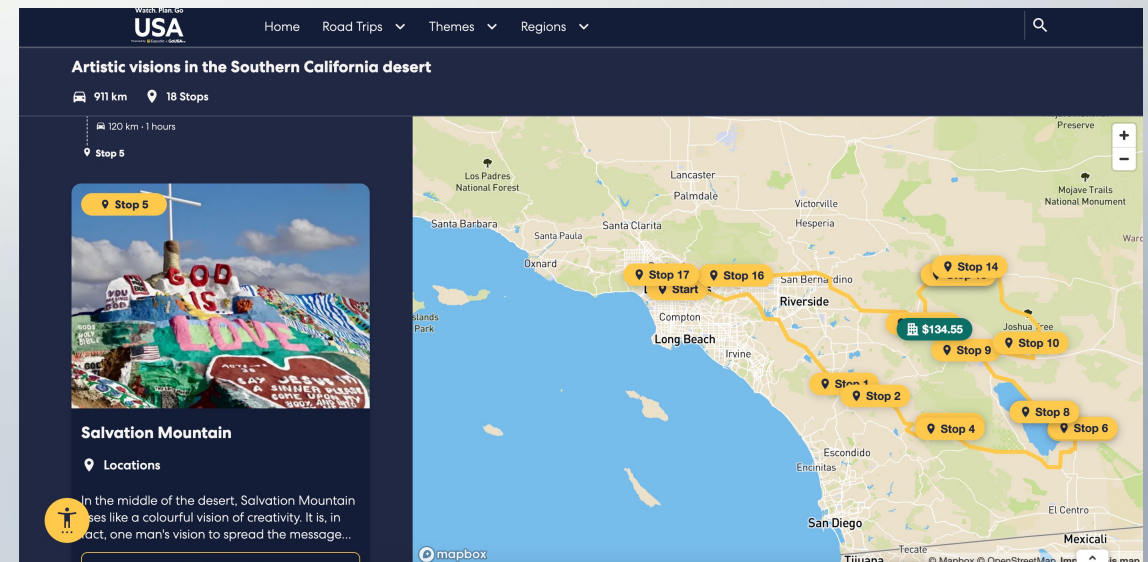
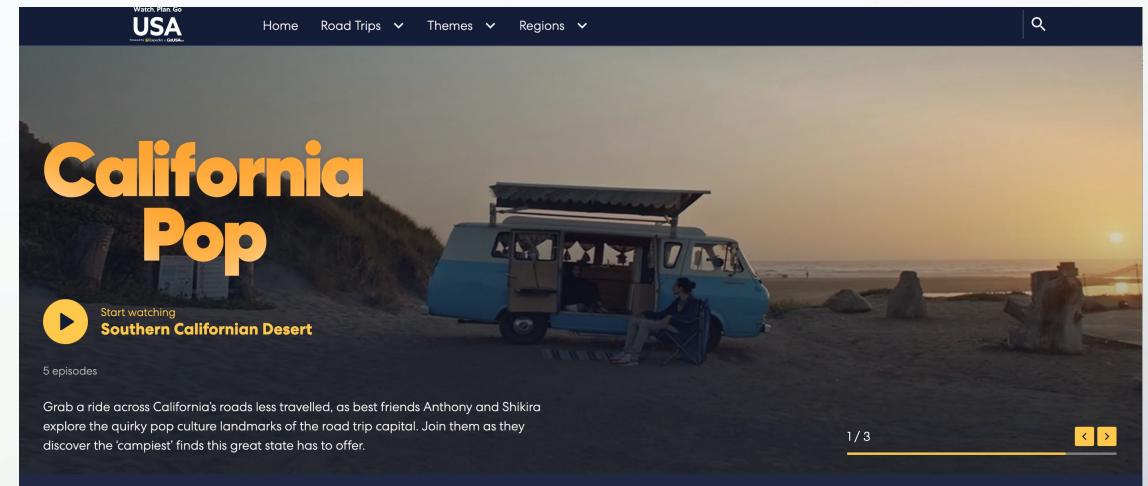


	April	May	June	July	August	September
Branding						
Education						
Shopping						

Expedia Shoppable Platform

- Brand USA has partnered with Expedia to create a shoppable content platform
- This campaign uses technology, where GoUSA TV's content can be “shopped” real-time making it easy for people to “Watch, Plan and Go” all in one platform
- Pilot launched in Canada in April 23
- Please visit:

<https://www.gousatv.expedia.ca/>





Canada Trade Update with Casey Canevari, Senior Manager Global Trade Development - Canada

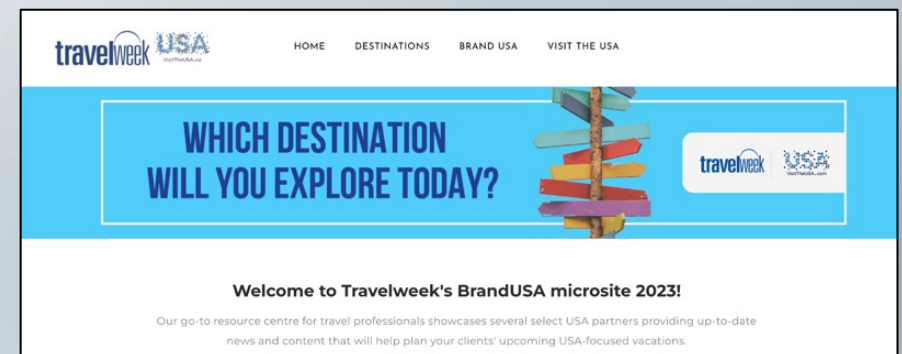
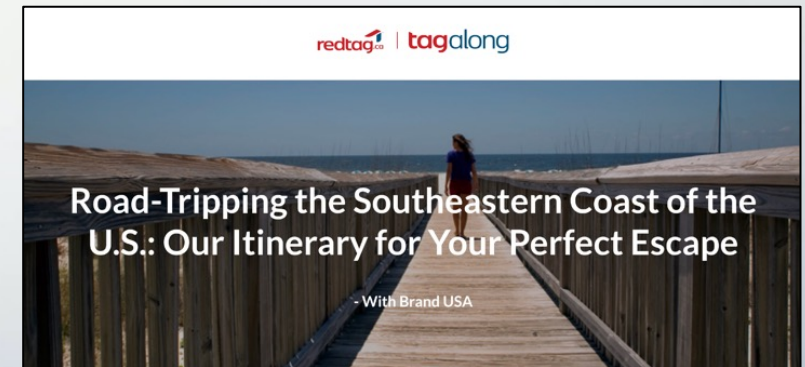
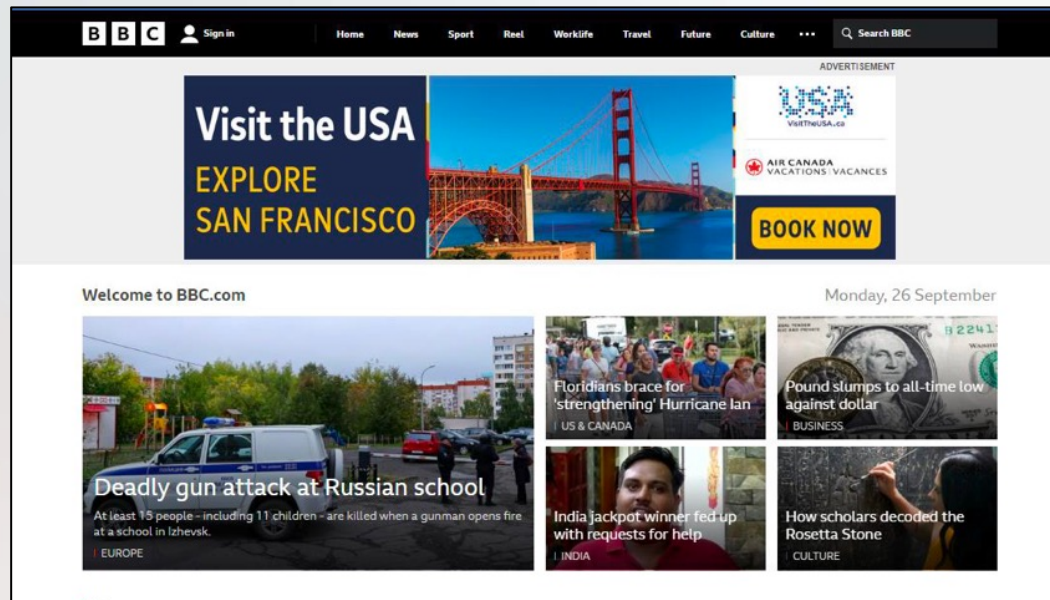
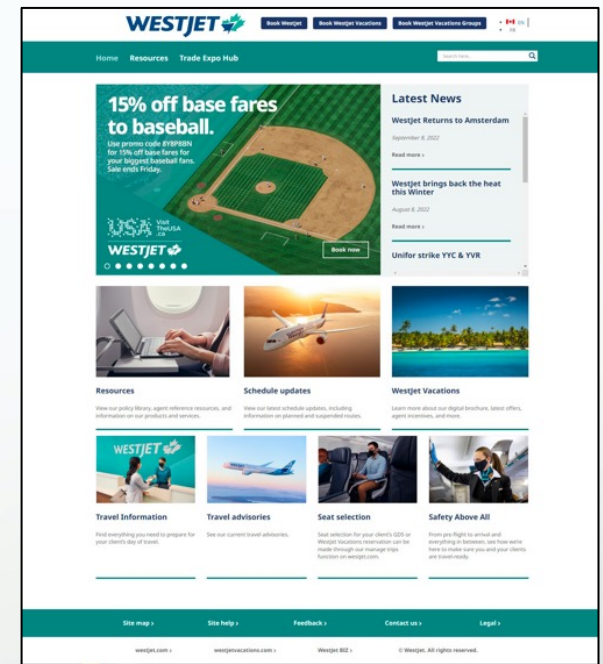


Road to IPW:
Canada Market Outlook

Global Trade Development

CO-OP Marketing Campaigns

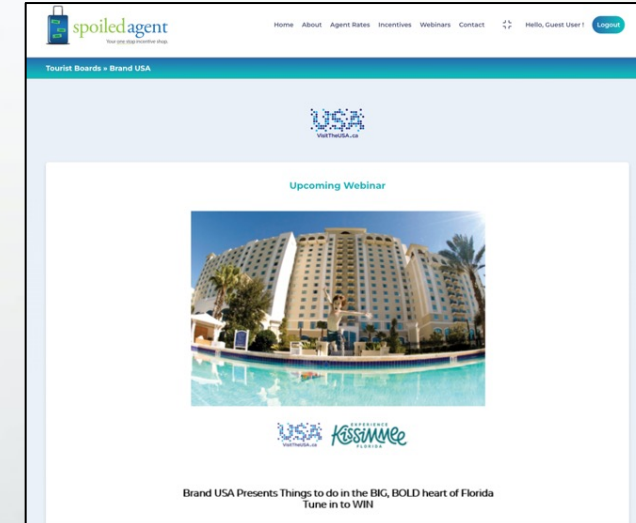
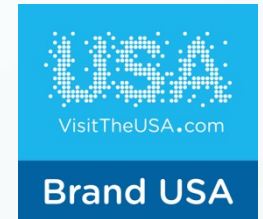
- Tour Operator Campaigns include:
 - Air Canada Vacations, Travel Brands
- Trade and Consumer Campaigns:
 - Travelweek, Westjet, Perkopolis



Global Trade Development

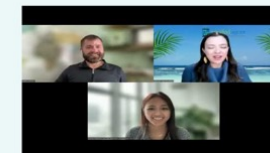
Agent Engagement

- Participation in Tour Operator and Agent Training Events
- Monthly Spoiled Agent Trainings – Guest Destination Speakers Welcome
- Into Nature's Wild Road Show – April/May 2023
- Air Canada Vacations in-person training – May 2023
- USA Discovery Program Promotion



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Watch the recorded webinars from Brand USA



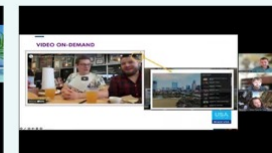
Brand USA
Tourist Boards

February 23, 2023

Brand USA Presents "Welcome All Y'all To The Authentic South"

Travel South USA is the official regional destination marketing organization for the Southern United States. We'd like to invite all y'all to experience, reconnect and travel where the...

Watch Now >



Brand USA
Tourist Boards

December 20, 2022

Brand USA Presents "South Dakota - Great Faces & Great Places"

There's no better place to explore America's frontier heritage and pioneer spirit than in South Dakota, a stunningly scenic state where history, culture and outdoor adventure await. In addition...

Watch Now >



Brand USA
Tourist Boards

December 07, 2022

Brand USA Presents "Puerto Rico In Focus"

Do you want to know what's new, now, and next in Puerto Rico? Join our Puerto Rico in Focus webinar to discover all that the Island has to offer, from places to stay to things to do.

Watch Now >

Global Trade Development

Trade Events

- Trade Introduction – Toronto and Montreal – February 2023
- Discover America Canada Annual General Meeting – March 2023
- *Into Nature's Wild* Road Show in partnership with Collette Vacations – April/May 2023
- Association of Canadian Travel Agents Annual Golf Tournament – July 2023
- Bourbon and Chris Stapleton Evening Event – August 2023
- Association of Canadian Travel Agents (ACTA) - Toronto Trade Show Participation – September 2023
- Kentucky Product FAM – October 2023



Six City Film Screening

Into Nature's Wild Road Show

Film Screening: 6 cities in rapid succession:

- April 25th – Ottawa
- April 26th – Halifax
- April 27th – Winnipeg
- May 2nd – Edmonton
- May 3rd – Calgary
- May 10th – Vancouver



The screenshot shows the Collette website with a banner for the 'Into Nature's Wild' road show. The banner includes a 'REGISTER' button and logos for MacGillivray Freeman, GoUSA, Expedia, United Airlines, and USA. Below the banner, the text reads: 'Join a Celebration of America with Collette and Brand USA'. The text describes the film 'Into Nature's Wild' and the road show event, mentioning a VIP reception and an exclusive screening of the film. The Collette and USA logos are at the bottom.



Global Trade 2024 Initiatives

Upcoming for 2024?

- Canada Sales Mission - April 2024
- Canada MegaFAM - Spring 2024



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Quick Poll

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Do you currently have Trade rep support in Canada?

- a. Yes – directly
- b. Yes – through my state/regional DMO
- c. PR only
- d. No



Canada Partner Programs

Julie Paulson
Sr. Manager of Partner
Marketing Programs

Road to IPW:
Canada Market Outlook



Rogers Media

Road to IPW:
Canada Market Outlook

Program Overview



Brand USA is harnessing the power of Rogers Sports & Media’s best-in-class content across digital and TV to inspire Canadians to travel to their destinations.

Rogers is the largest cable TV service provider and wireless service provider in Canada.

CAMPAIGN KPIs



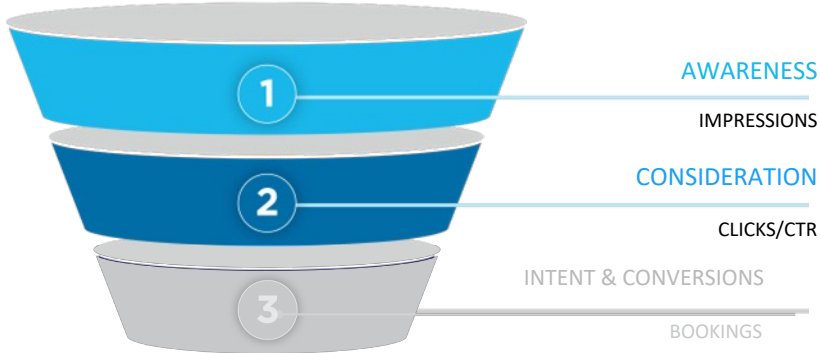
REACH
IMPRESSIONS



ENGAGEMENT
CLICKS/CTR

STAGE OF TRIP PLANNING

Higher-funnel travel inspiration platform that garners awareness



IN-MARKET DATES: ONGOING

COMMITMENT DATE: 8 WEEKS PRIOR TO LAUNCH

ASSET COLLECTION DATE: 4 WEEKS PRIOR TO LAUNCH

CAMPAIGN LENGTH: 8 WEEK DURATION

REPORTING: 30 DAYS AFTER CAMPAIGN COMPLETION

Key Benefits



Rogers reaches 95% of all Canadians across its platforms, including a display network of nearly 200 websites.



Geo-targets campaign to Montreal, Toronto, or Vancouver.



Opportunity to target traveler segment in digital campaign.



Turnkey program with flexible campaign timing.

Campaign Tier Levels



TIER LEVELS AND DELIVERABLES

		TIER 1	TIER 2	TIER 3
Media type		Impressions		
Display Ad Networks Ads: 8-week campaign		3,000,000	2,000,000	1,000,000
CityTV 30-second spots: 6-week campaign	Toronto	3,600,000	2,500,000	1,200,000
	Vancouver	4,000,000	2,500,000	1,200,000
	Montreal	8,000,000	5,000,000	3,500,000
Total Impressions		6.6 million – 11 million impressions*	4.5 million – 7 million impressions*	2.2 million – 4.5 million impressions *

*Total impressions depend on market selected.

Creative Examples

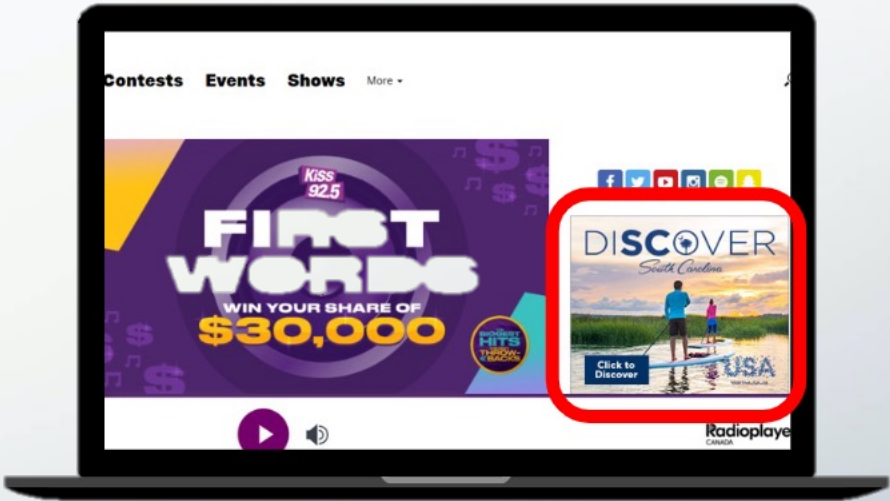
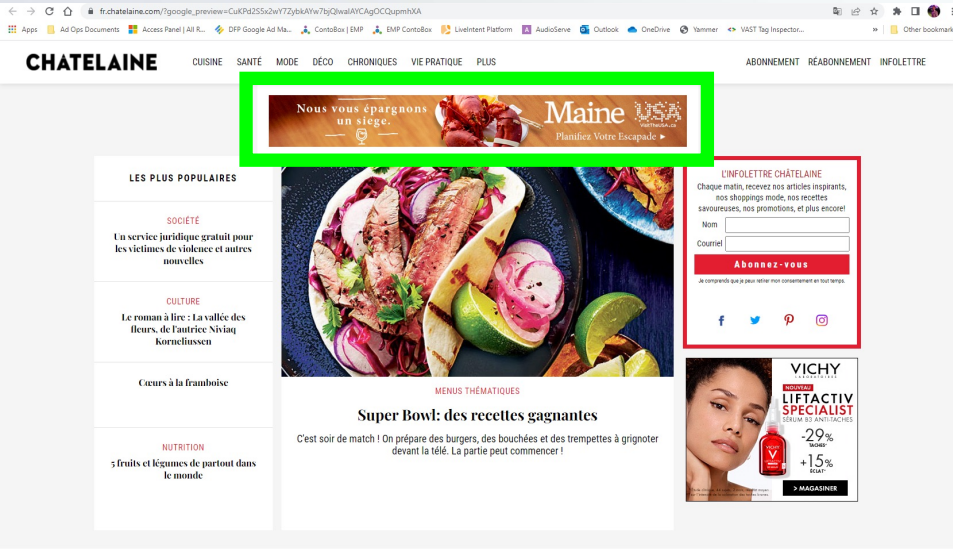


VisitTheUSA.com

Brand USA

Digital Banner Ads

Display Ads





Air Canada

Road to IPW:
Canada Market Outlook

Program Overview



Brand USA

Engage Canadian travelers to increase air traffic demand to the U.S. on Air Canada’s channels.

Brand USA is offering a digital marketing campaign including ads across AirCanada.com, e-newsletter ads, and a programmatic campaign driving traffic to US destinations.

CAMPAIGN KPIs



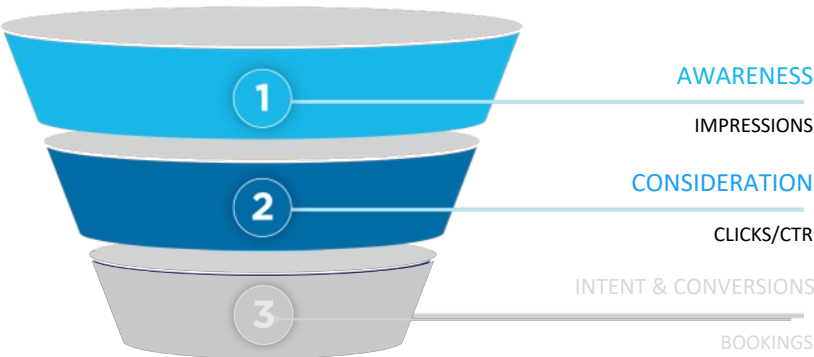
REACH
IMPRESSIONS



ENGAGEMENT
CLICKS/CTR

STAGE OF TRIP PLANNING

Upper funnel planning tool inspiring travelers to consider future bookings



IN-MARKET DATES: ONGOING

COMMITMENT DATE: 6 WEEKS PRIOR TO LAUNCH DATE

ASSET COLLECTION DATE: 4 WEEKS PRIOR TO LAUNCH DATE

CAMPAIGN LENGTH: 3-8 WEEKS

REPORTING: 4 WEEKS AFTER CAMPAIGN COMPLETION

Key Benefits



Partner with Canada's largest airline providing the most flights from Canada to the USA.



Flexible campaign timing.



Reach 2.5 million subscribers seeking offers on flights and hotels in the Deals of the Week newsletter.



Target Air Canada website visitors to engage with brand messaging outside of AirCanada.com, utilizing first-party data.

Campaign Tier Levels



TIER LEVELS AND DELIVERABLES

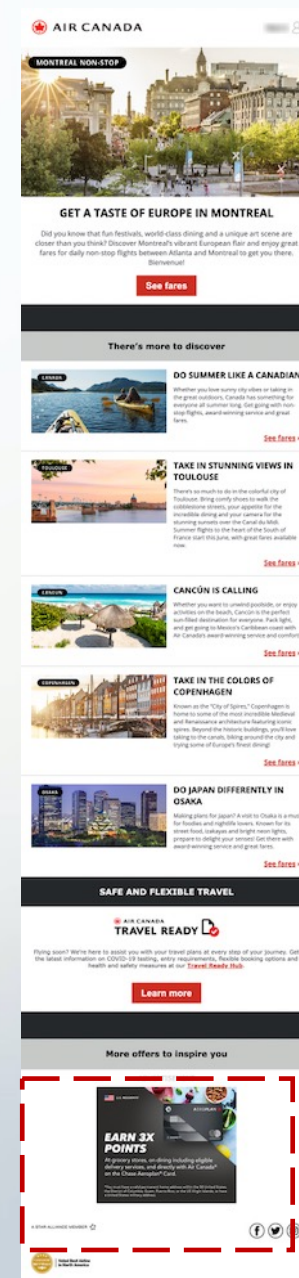
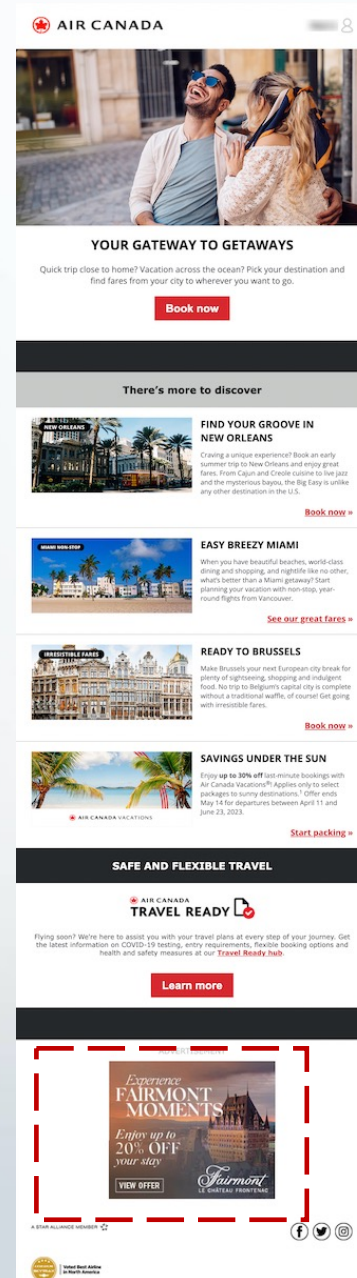
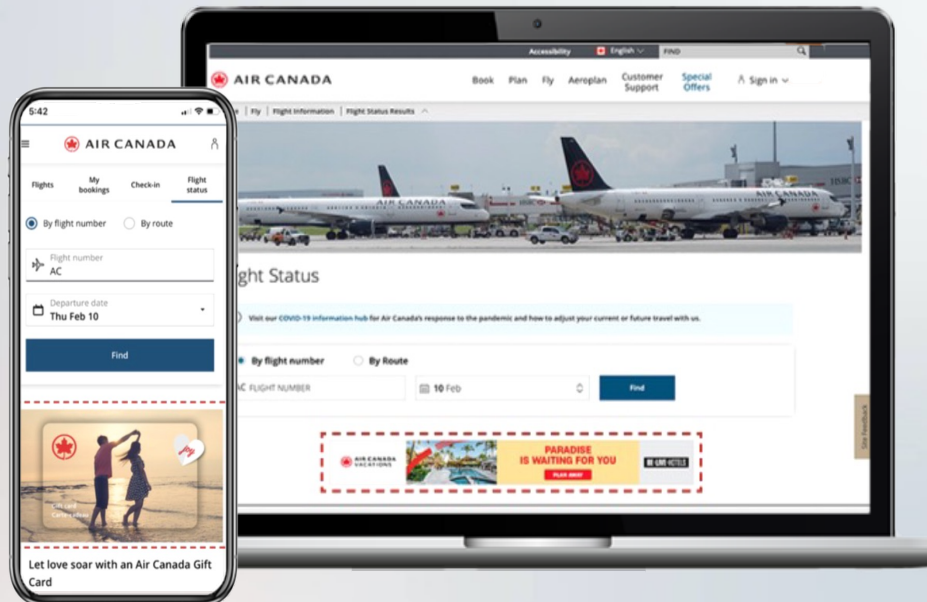
CAMPAIGN TIER	DEALS OF THE WEEK E-NEWSLETTER	PROGRAMMATIC CAMPAIGN	AIRCANADA.COM DISPLAY ADS
Tier 1	<p>2 emails Scheduled to deploy on Wednesdays</p> <p>4,082,000 impressions</p>	<p>Precision programmatic campaigns target Air Canada website visitors to engage with brand messaging within and outside AirCanada.com; targets first-party data segments</p> <p>440,000 impressions</p>	<p>Ad campaigns rotate on 20-plus select, high-traffic pages (on mobile and desktop) to engage and influence consumers as they navigate the site</p> <p>300,000 impressions</p>
Tier 2	<p>1 email Scheduled to deploy on Wednesdays</p> <p>2,041,000 impressions</p>	<p>Precision programmatic campaigns target Air Canada website visitors to engage with brand messaging within and outside AirCanada.com; targets first-party data segments</p> <p>220,000 impressions</p>	<p>Ad campaigns rotate on 20-plus select, high-traffic pages (on mobile and desktop) to engage and influence consumers as they navigate the site</p> <p>150,000 impressions</p>

FY23 Air Canada Program

Creative Examples

Deal of the Week Newsletter (DOW)

Display Ads



Programmatic





Air Canada Vacations

Road to IPW:
Canada Market Outlook

Program Overview



Promoting U.S. destinations to Canadian travelers utilizing Air Canada Vacations’ marketing channels.

Digital marketing campaigns feature placement on AirCanadaVacations.com, e-newsletter ads, social promotion, and a programmatic campaign driving traffic.

CAMPAIGN KPIs



REACH
IMPRESSIONS

Road to IPW: Canada Market Outlook



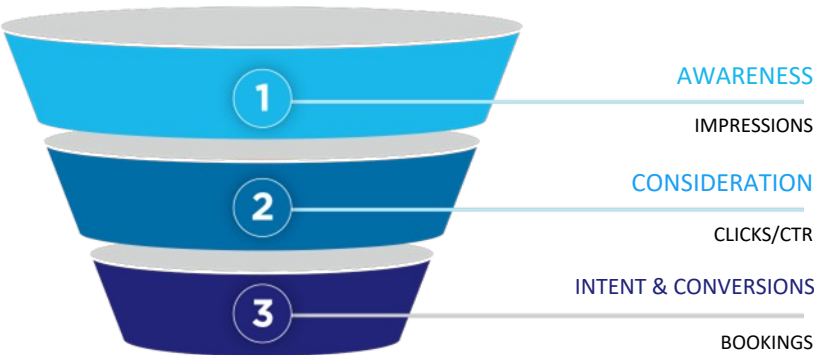
ENGAGEMENT
CLICKS/CTR



CONVERSIONS
ROOM NIGHTS

STAGE OF TRIP PLANNING

A lower funnel program that drives direct bookings



IN-MARKET DATES: ONGOING

COMMITMENT DATE: 6 WEEKS PRIOR TO LAUNCH DATE

ASSET COLLECTION DATE: 4 WEEKS PRIOR TO LAUNCH

CAMPAIGN LENGTH: 1 MONTH

REPORTING: 30-60 DAYS AFTER CAMPAIGN COMPLETION

Key Benefits



Promotes more than 45 destinations throughout the USA.



Collaborate with a top Tour Operator with over 40 years in business.

Repeat recipient of the Consumer's Choice Award for Best Travel Wholesaler. Air Canada Vacations has also been named a Favorite Tour Operator and Favorite Travel Supplier Website by Baxter Travel Media's Agents' Choice Awards.



Share destination information with Air Canada Vacations travel agents.

Campaign Overview



DELIVERABLES

AD TYPE	MEDIA	DESCRIPTION	# OF INSERTIONS	APPROX. IMPRESSIONS / DISTRIBUTIONS	LENGTH OF INSERTION
ACV Internet	AirCanadaVacations.com	Carousel Banners “Handpicked Offers”	2	N/A	1 week
		Destination Page – Secondary Banner – U.S.	1	N/A	1 week
Digital Media	District M	Programmatic Display Ads – Pkg 1	1	2,000,000	2 weeks
Direct Marketing - Consumer	Air Canada Vacations Newsletter – Weekly Deals	Leaderboard	1	230,000	Once during the month scheduled
B2B Social Media	ACV Facebook	1 post on ACV’s Inner Circle Agent Facebook Group (trade group)	1	4,800	Once during the campaign

FY23 Air Canada Vacations Program

Creative Examples

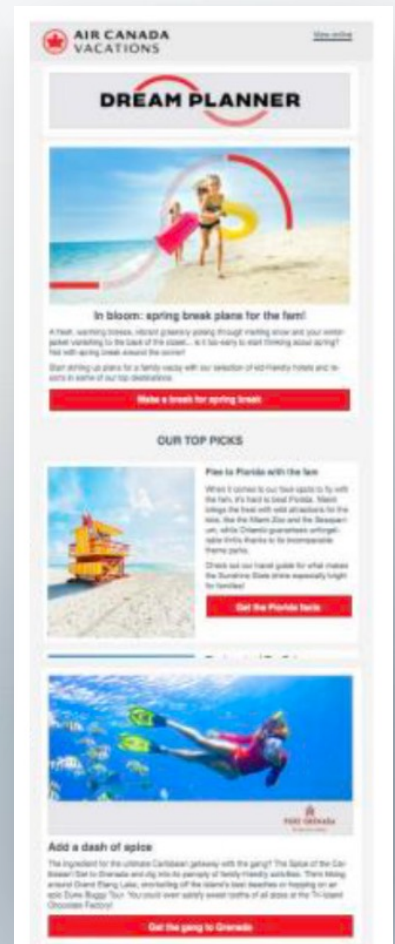
AirCanadaVacations.com

Social Media

Air Canada Vacations
Newsletter



Brand USA





Canada Loyalty Marketing Program

Road to IPW:
Canada Market Outlook

Program Overview



Brand USA has partnered with AIR MILES, Canada’s most recognized loyalty program, to provide a full funnel activation program in the Canada.

AIR MILES has over 9.4 million active collector accounts, representing approximately two-thirds of all Canadian households.

This program will leverage the AIR MILES travel booking engine to engage with collectors looking for ways to utilize their loyalty points to encourage them to book travel to US destinations.

CAMPAIGN KPIs



REACH
IMPRESSIONS

Road to IPW: Canada Market Outlook



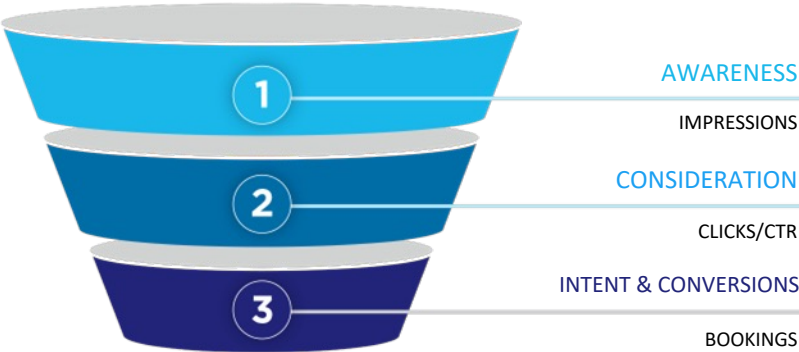
ENGAGEMENT
CLICKS/CTR



CONVERSIONS
HOTEL BOOKINGS, FLIGHT BOOKINGS, CAR
RENTAL METRICS

STAGE OF TRIP PLANNING

A lower funnel program that drives direct bookings



IN-MARKET DATES: ONGOING (subject to availability)

COMMITMENT DATE: 10 WEEKS PRIOR TO LAUNCH

ASSET COLLECTION DATE: 8 WEEKS PRIOR TO LAUNCH

CAMPAIGN LENGTH: 4 – 6 WEEKS

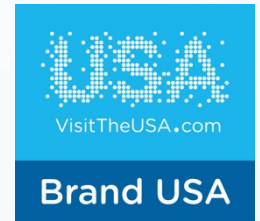
REPORTING: 45 DAYS AFTER CAMPAIGN COMPLETION

FY23 Canada Loyalty Marketing Program

AIR MILES Rewards Partnerships



Key Benefits



AIR MILES is Canada's largest consumer loyalty program with 9.4 million participants (Mile Collectors), reaching almost 2/3 of Canadian households.

AIR MILES has 30 years of first-party, detailed consumer/collector data that includes intelligence on travel booked through their full-service online travel agency.



Reach prospective Canadian travelers eager to utilize their rewards points for flight, accommodation, and car rental bookings.



70% of AIR MILES collectors are ready to travel

AIR MILES collectors can utilize both cash and loyalty points (miles) to pay for travel.



AIR MILES is currently launching a new booking engine with the top-notch functionality today's travelers expect including easy product bundling and new payment flexibility.

Collector's will also enjoy new opportunities to earn even more miles with every booking. This new value proposition makes booking travel with AIR MILES a new market leader in consumer value per travel booking.

Campaign Tier Levels



TIER LEVELS AND DELIVERABLES

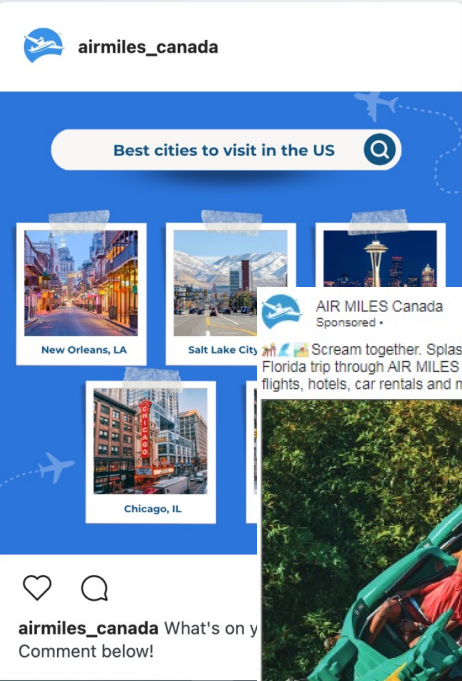
CAMPAIGN TIER	EXCLUSIVE EMAIL	SHARED TRAVEL EMAIL	PAID MEDIA	ORGANIC SOCIAL MEDIA	BOOKING INCENTIVES	AIR MILES TRAVEL HOME PAGE BANNER	LANDING PAGE	TOTAL IMPRESIONS
Tier 1 6-week campaign	1x inclusion in destination specific email	2x inclusions in a travel email	Targeted Facebook & Instagram ads to drive traffic and awareness*	1x Instagram & 1x Facebook post	AIR MILES will create an incentive to entice users to book	1x inclusion	1x customized landing page included	7,000,000 estimated impressions
Tier 2 4-week campaign	1x inclusion in destination specific email	1x inclusion in a travel email	Targeted Facebook & Instagram ads to drive traffic and awareness*	n/a	n/a	n/a	1 customized landing page included	4,600,000 estimated impressions

**Regional or nationwide targeting available. Please note: participation is limited to two per month.*

FY23 Canada Loyalty Marketing Program

Creative Examples

Organic Social

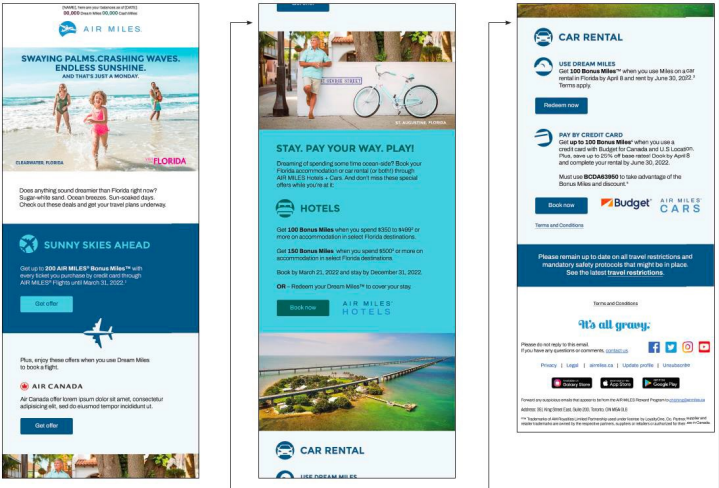


Paid Social

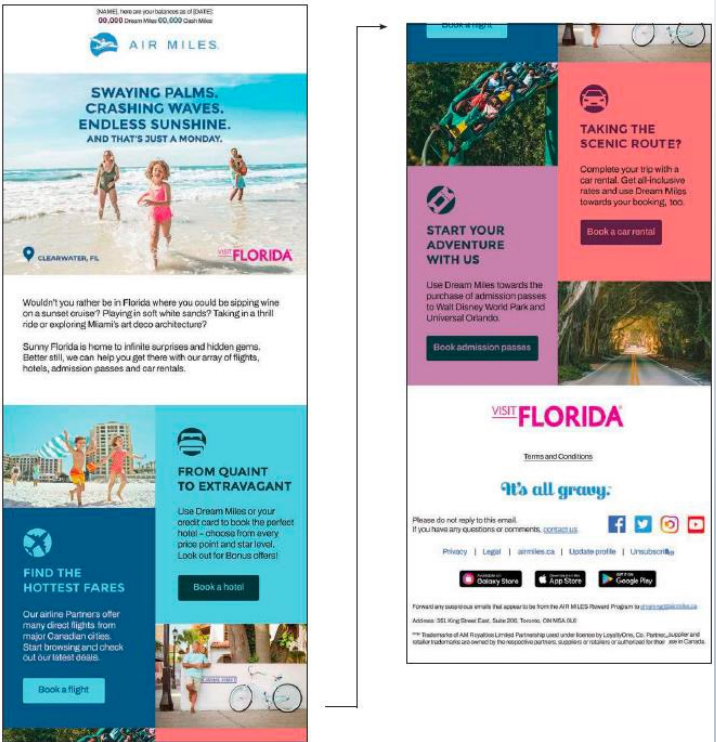


Road to IPW: Canada Market Outlook

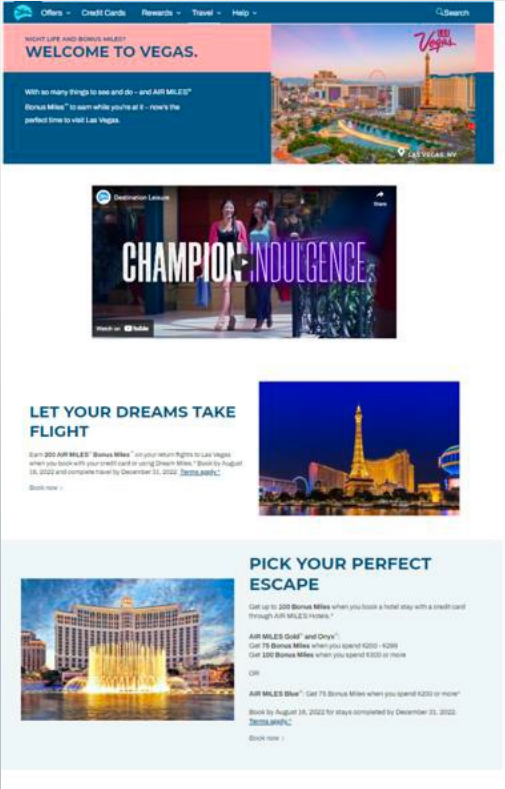
Shared Travel Email



Exclusive Email

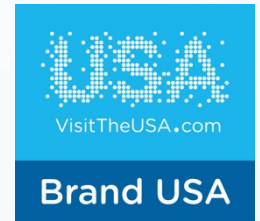


Custom Landing Page



Canadian Partner Programs

Additional Opportunities Available



Affinity Partnerships
Destination 101 training Videos
Global Inspiration Program
Global Marketplace
Interactive Travel Guide
Optimized Audience Campaign
Programmatic Media
Video Creation & Distribution
VisitTheUSA Sites



Interested in learning more? Please contact us for additional details.

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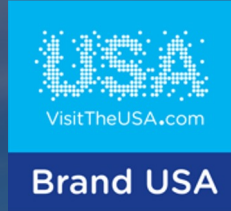
Quick Poll



What areas of Brand USA support are of interest to you in Canada?

Select all that apply.

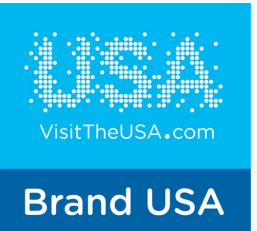
- a. Trade support
- b. Digital advertising/programmatic
- c. Inspiration level/content creation programs
- d. Tour operator programs
- e. OTA opportunities
- f. Social media/influencers
- g. TV - linear or streaming
- h. Out of home



Last Important Updates

FY24 Optimized Audience Campaign

Target Key Markets During Seasonal Planning Periods*



Season	Market	Close Date	Campaign Launch Date
FALL	Mexico	June 23, 2023	October 23, 2023
	Canada	June 30, 2023	October 23, 2023
WINTER	Mexico	August 11, 2023	January 8, 2024
	U.K.	September 1, 2023	January 15, 2024
	Germany	September 8, 2023	February 5, 2024
	South Korea	September 29, 2023	February 26, 2024
SPRING	India	October 13, 2023	March 4, 2024
	Brazil	October 13, 2023	March 18, 2024
	France	October 27, 2023	March 25, 2024
	Canada	November 1, 2023	April 1, 2024
	U.K.	November 10, 2023	March 25, 2024
	Germany	December 1, 2023	April 29, 2024
	Australia	December 15, 2023	May 13, 2024

*Tentative dates; subject to change
Road to IPW: Canada Market Outlook

We hope to see you!

Upcoming Brand USA Activities*



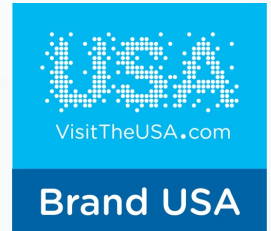
May 2023	June 2023	July-August 2023	October 2023	January 2024	February 2024	March 2024	April 2024	July 2024
5/21: Market Education Sessions @ IPW	6/6-14: AUS/NZ Mega Fam with Hawaiian Airlines (HI, CA, TX, OR, WA, NV, UT, MA, NY)	7/15: GoUSA TV Storytelling Awards submissions due July: RHS Flower Show July: Japan & South Korea Sales Mission August: Korea: Roadshow with Hana Tour	10/16-19: Brand USA Travel Week in London	1/21-25: India Sales Mission	2/13-16: Mexico Sales Mission 2/14-15: New Zealand Expos 2/22: Australia B2B	3/11-15: South America Sales Mission *Spring 2024* Canada MegaFam	4/15-19: Canada Sales Mission	7/15-19: Japan & South Korea Sales Mission

*Tentative dates; subject to change

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Last but not least

See you at IPW!



- Sunday, May 21, 9:30am-12pm: Brand USA Global Trends and Market Insights
Stars in the Night Ballroom B1 at the Convention Center (open to all)
- Monday, May 22, 8-8:45am: Press Conference
Stars in the Night Ballroom B1 at the Convention Center (open to press)
- Monday, May 22, 12:30-1:45: Lunch with Brand USA
Hall 4 (open to all)

Brand USA Booth #1047



*Tentative dates; subject to change
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Thank you!

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Canada Market Update