



Q2-FY2017 Marketing Committee Meeting

Thursday, March 2, 2017



Opening Remarks and Introductions



Barbara Richardson
Chair, Marketing Committee

Executive and Senior Management



Chris Thompson
President & CEO



Thomas Garzilli
*Chief Marketing
Officer*



Anne Madison
*Chief Strategy &
Communications Officer*



Don Richardson
*Chief Financial
Officer*



Karyn Gruenberg
*Senior Vice President
Partner Marketing &
Strategic Alliances*



Cathy Domanico
*Vice President
Global Trade
Development*



Tracy Lanza
*Vice President
Integrated
Marketing*



Carroll Rheem
*Vice President
Research & Analytics*



Stanley Mattos
*Vice President
Operations*

Marketing Committee Meeting Agenda

- **Opening Remarks**
 - Call the Meeting to Order
 - Introductions: Management, Legal Counsel, and Invited Guests
- **Item 1: Approval of the Minutes from the December 2, 2016 Meeting***
- **Item 2: CEO Report**
- **Item 3: Update on U.S. Visa and Entry Policy**
- **Item 4: CMO Report & Partner Roundtables Review**
- **Item 5: Partner Survey and ROI Study Update**
- **Item 6: The USA Campaign: New Creative Spots**
- **Item 7: Partner Programs Update**
- **Item 8: New Product Development Update and International Representation Firms RFPs**
- **Discussion and Q & A**
- **Closing Remarks and Adjourn Meeting**

* vote required



Item 1: Approval of the Minutes*

* vote required



Item 2: Chief Executive Officer Report



Chris Thompson
President and CEO

Item 3: Chief Marketing Officer Report & Partner Roundtables Review



Thomas Garzilli
Chief Marketing Officer

Roundtables Review: January 2017

- CMO Roundtable: 1/24
 - 17 partners participated
- Partner Programs Roundtable: 1/25
 - 9 partners participated
- Global Trade Development: 1/25
 - 19 partners participated
- 38 total, unique partners participated
- Next round via webinar: 3rd week of May 2017

Item 4: U.S. Visa and Entry Policy Updates



Anne Madison
Chief Strategy &
Communications Officer

Item 5: Research Updates



Carroll Rheem

VP, Research & Analytics



VisitTheUSA.com

Brand USA Annual ROI Study Project Plan

- March 30 – complete compilation of all data inputs and monthly market share analysis
- April 28 – complete modeling
- May 15 – draft report
- May 22 – final report

Brand USA Annual Partner Study 2017

- Objective – measure partner satisfaction across important facets of our operations including:
 - Clarity in communications
 - Responsiveness
 - Marketing effectiveness
- Sample
 - 45 surveys completed (52 in 2016)
 - Representative sample of partners across verticals and contribution levels
- Results Highlights
 - 96% agree that partnering with Brand USA adds value to their organization (92% in 2016)
 - 100% intend to partner with Brand USA again in the future (96% in 2016)

Partner Comments

Brand USA is working hard to meet many stakeholders' needs and expectations so we understand those challenges. We hope to see **better alignment of programs to demand drivers, improved communication and reporting.**

Each year the organization **gets better and better** bringing programs of value.

I always look to Brand USA's markets and programs to see where I can align [company]'s objectives. In addition, I highly **value BUSA's research.**

My challenge is the **extreme amount of time** that is required to participate and deliver creative assets. Better **tracking of results** and value is needed.

Opportunities offered are **expensive for a smaller budget** like ours to participate in. I would appreciate some programs that are more economical - possibly a **regional or "theme" approach that would include multiple partners.**

Our partnership direct with Brand USA staff is **terrific, timely and strong.** The communications with [program vendor] has been frustrating at times, **unclear, and very much reactive.**

The opportunity to have content translated to multiple languages included in the pricing--very reasonable--of programs allows us to **reach markets we could not otherwise afford to reach.**

This year's program was very strong and it's clear that the **marketing efforts are taking hold and gaining momentum.** Congrats!



Item 6: Consumer Marketing Update



Tracy Lanza

VP, Integrated Marketing



FY2017 – FY2018 Consumer Marketing



Strategic Framework: The 3 Ps



possibility



PERSONA



Proximity

Operating Principles

The 3Ps have been built into the fabric of our new site, campaign and content approach to deliver...

Authentic
Storytelling



Relatable, experiential, informational & shoppable content is key

Partner
Value



Modular formats across platforms help showcase unique destination and partner stories

Social
First



Travelers are inspired by and influenced through friends and family; be there in the moment.



Local :30

Charles Bradley, Ain't It A Sin



VisitTheUSA.com

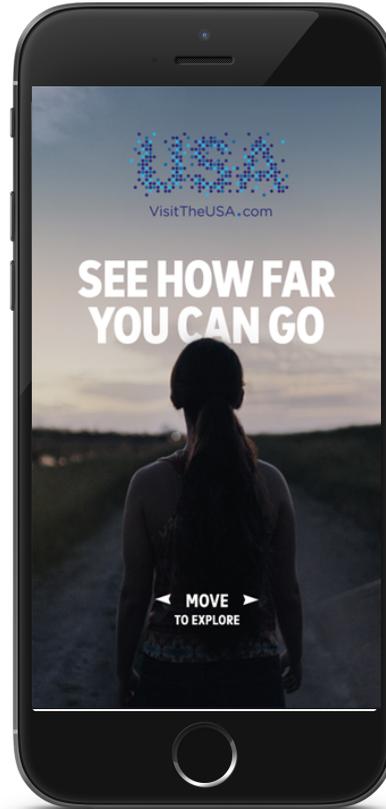
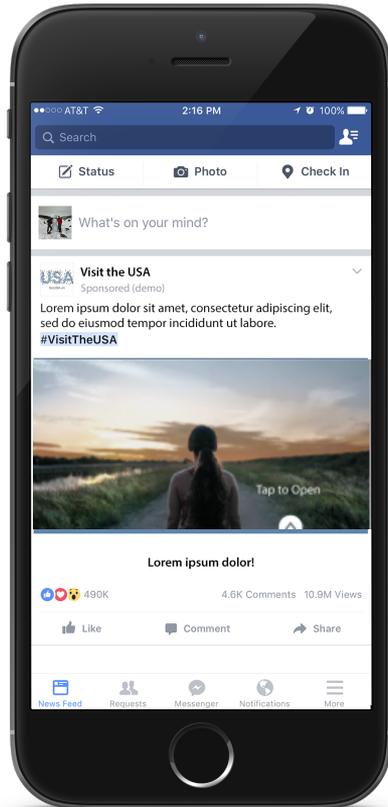
Escape :30

Alabama Shakes, Sound & Color

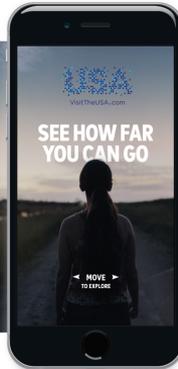
Excitement Bold :30

Rafferty, Apple Pie

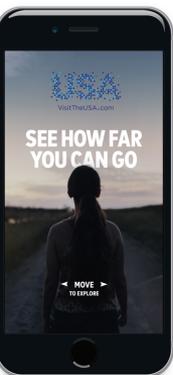
Facebook Canvas



Canvas Ad: Panoramic Image Close-up



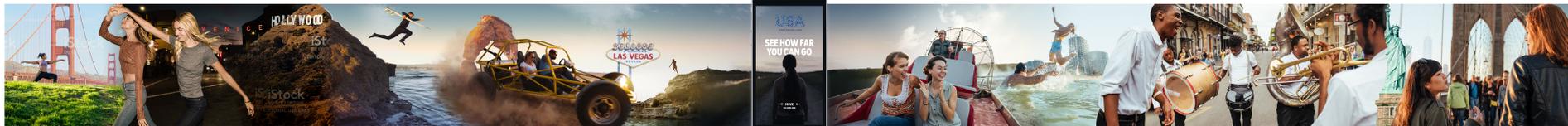
Canvas Ad: Panoramic Image Close-up



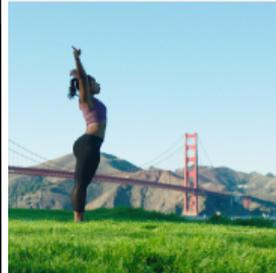
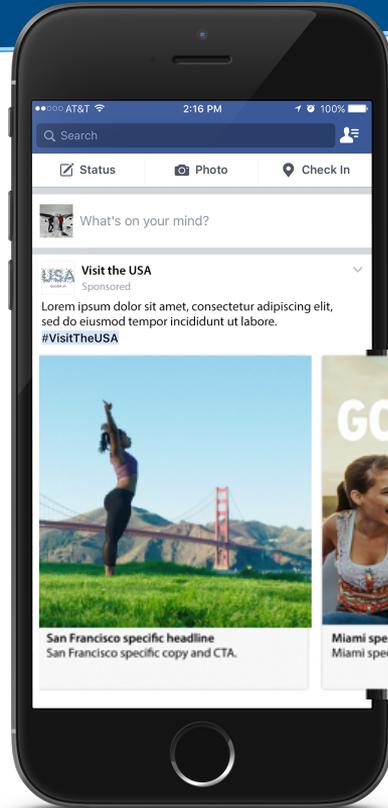
Canvas Ad: Stories



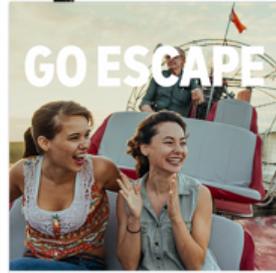
Canvas Ad: Full View



Carousel: Escape



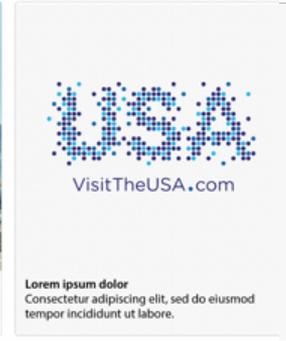
San Francisco specific headline
San Francisco specific copy and CTA.



Miami specific headline
Miami specific copy and CTA.



Los Angeles specific headline
Los Angeles specific copy and CTA.



Alpha Test: Facebook Visitation Study

People are now cross-device, browser, publisher...cross-everything.

Measurement needs to catch up



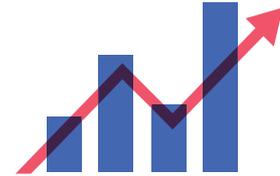
Reach

- How many people have you reached with your message, how many times?



Resonance

- How have brand perceptions changed as a result of media exposure?



Reaction

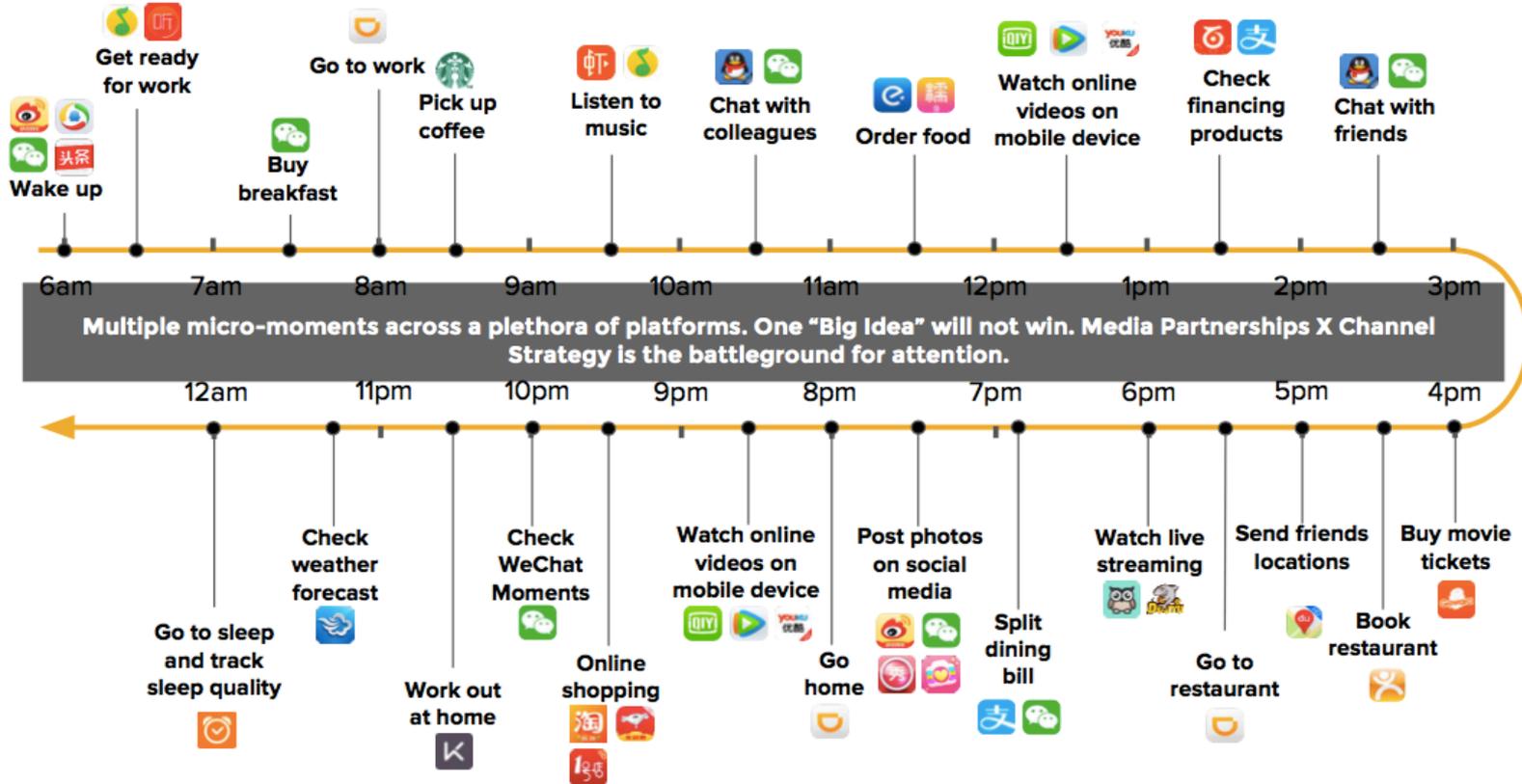
- How have visits increased as a result of media exposure?

FY2017-FY2018 Editorial Calendar

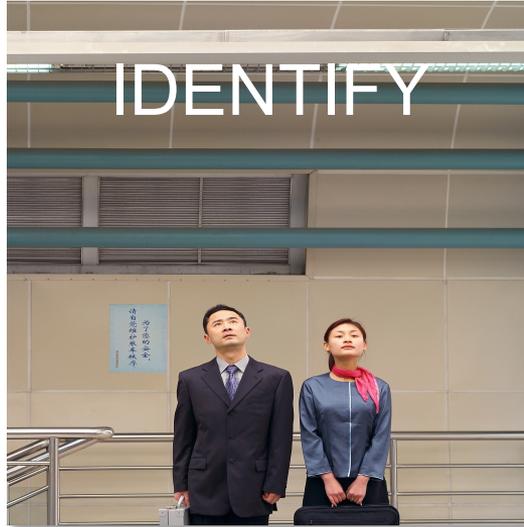
Month	October	November	December	January	February	March	April	May	June	July	August	September
Brand Campaign	See How Far You Can Go											
Tone	Discovery			Go			Possibility			Freedom		
Theme	Neighborhoods, Cities, Towns			Arts & Entertainment			Road Trips			Great Outdoors		
Objective	Promote hidden gems to demonstrate that there is more available in the USA that you might have thought			Leverage the pop culture strength of the USA to generate interest			Showcase a broad range of travel possibilities (destinations/experiences) accessible via car			Use iconic destinations to spark traveler curiosity to want to see live		
SHFYCG	Invite travelers to discover their own unique finds in off-the-beaten-path locations			Emphasize the spiritual/emotional journey associated with experiencing art and culture			Encourage travelers to fully explore the areas they visit ("far" isn't only about distance)			Highlight the spiritual aspect of connecting with nature		
Partner Value	Work with partners to show experiences outside of the obvious ones they are known for			Connect partners with highly recognizable talent and entertainment/cultural events			Drive visitation to proximate locations outside major hub destinations			Create content that features unique USA landmarks/geographies and experiences to be had		

Streamline the BAT* landscape...

*Baidu, Alibaba, Tencent



...Drive Travel Affinity for the USA



Understand China's market and landscape, landing on specific target groups



Map our target's booking journey, and leverage their favorite channels and platforms to create connections.



How will we bring differentiating experiences to life with best-in-class creative expression and innovative execution?

...By Building On Our Strength

USA on the go. #RoadTripUSA

Global travelers are seeking for more authentic cultural experience and emotional fulfilment, rather than mere sightseeing.



59.1%
Variety of culture

32.9%
Difference in lifestyle

57.6%
Experience to share



在路上
ON THE GO



GoUSA.cn

Item 7: Partner Programs Update



Karyn Gruenberg

**SVP, Partner Marketing & Strategic
Alliances**



VisitTheUSA.com

Participation in Co-op Programs

- FY16* Participation:
 - Inspiration Guide: 153 Partners
 - Multi-Channel: 103 Partners
 - VisitTheUSA.com: 94 Partners
 - Video Services: 59 Partners

*Based on program commitment dates; not program in-market dates



VisitTheUSA.com – New Opportunities for Partners

- Significantly enhanced content features on new website
 - Must Sees, Events, TripAdvisor content
- New “Trips” pages promoting multi-destination itinerary and road trip content
- Ability to connect consumers to activation partners
- Built in marketing on and off the site
 - Featured sorting/placement for website participants
 - Dedicated traffic generation campaigns with all programs
- New Microsite offering will allow destinations to leverage Brand USA’s digital platform to market their regions/states
- New options will attract even more partners
- FY16: 94 Partners

Inspiration Guide

- 2017 – 13 language versions, distributed in 55+ countries
- 30 million-plus impressions of digital guide guaranteed
- Includes new distribution opportunities with leading travel trade partners
- Extension of content assets through newly launched MyUSA Digital Magazine pilot
- Increased customization of partner content to create magazine feel
- Refined distribution in mature markets
- FY16: 153 Partners



Video = Story Telling

- Destination-At-Glance Videos
- International Storyteller (Thematic) Videos
- Native Traveler Videos
- Destination Videos produced by Matador
- Special/custom options:
 - 360 Videos
 - Animated Reality Videos
- FY16: 59 Partners

2016 MULTI-CHANNEL PROGRAM OVERVIEW



FY16: 103 Partners

Item 8: Global Trade Development Updates



Cathleen Domanico
VP, Global Trade Development

Product Development Update

- Product developed for:
 - Films and Promotions
 - Fams and MegaFams
 - Opportunities with Receptive Operators
 - Marketing Partnership Agreements

Product Development Update (continued)

- Current Projects:
 - MegaFams
 - Mexico: May 2 – 9
 - United Kingdom and Ireland: May 11 – 18
 - Focused Fams
 - China: April 24 – May 8
 - Australia/New Zealand: April 21 – 28
 - Partner Webinars
 - April
 - May

RFP Timeline

Market	Contract Award Date	Re-compete (RFP) Date
Brazil	April	2019
India	April	2020
UK	May	2019
Japan	May	2020
Germany	June	2020
Canada	July	2019
Australia/NZ	August	2020
Mexico	August	2019
Korea	September	2021
Hong Kong, Taiwan, Singapore	November	2021
China	November	2021

Discussion, Q&A, and Closing Remarks



Barbara Richardson
Chair, Marketing Committee



Thank you for Attending the March 2, 2017
Marketing Committee Meeting
of the Brand USA Board of Directors



Thank you for joining us

Travel Industry TheBrandUSA.com



Twitter: @BrandUSA



YouTube: YouTube.com/BrandUSAtv



LinkedIn: LinkedIn.com/Company/BrandUSA

Consumer VisitTheUSA.com



Twitter: @VisitTheUSA



Facebook: Facebook.com/VisitTheUSA



YouTube: YouTube.com/VisitTheUSA



Instagram: VisitTheUSA



Google+: Google.com/VisitTheUSA



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