

Brand USA's Mexico 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. We are only able to respond to those who have registered with a valid email address.
- 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

An Introduction

Agenda



- Housekeeping
- A Mexico Research Update, with Chelsea Benitez
- A Brand USA Mexico Consumer Update, with Clemen Hernandez
- A Brand USA Mexico Trade Update, with Lisa Tejeda
- Brand USA Program Opportunities in Mexico, with Julie Paulson



Chelsea Benitez, Director of Consumer Research



Research Updates

Agenda



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

Mexico: Global outbound travel



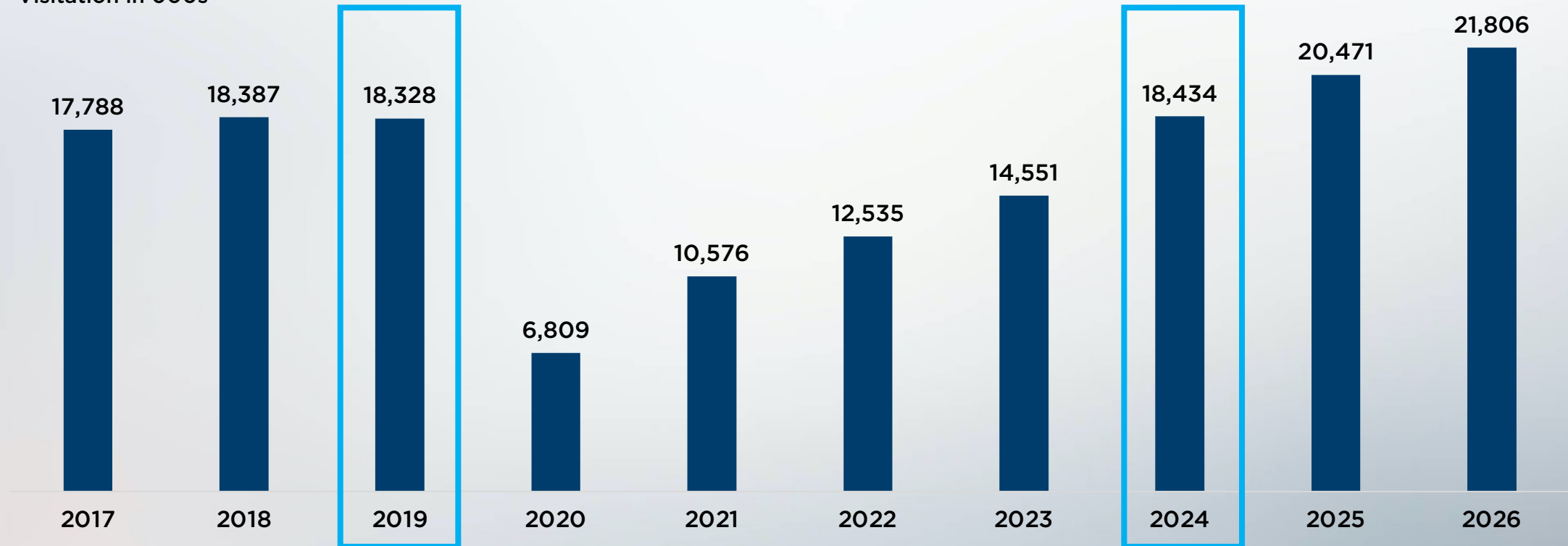
Visitation in 000s



Mexico: USA inbound travel



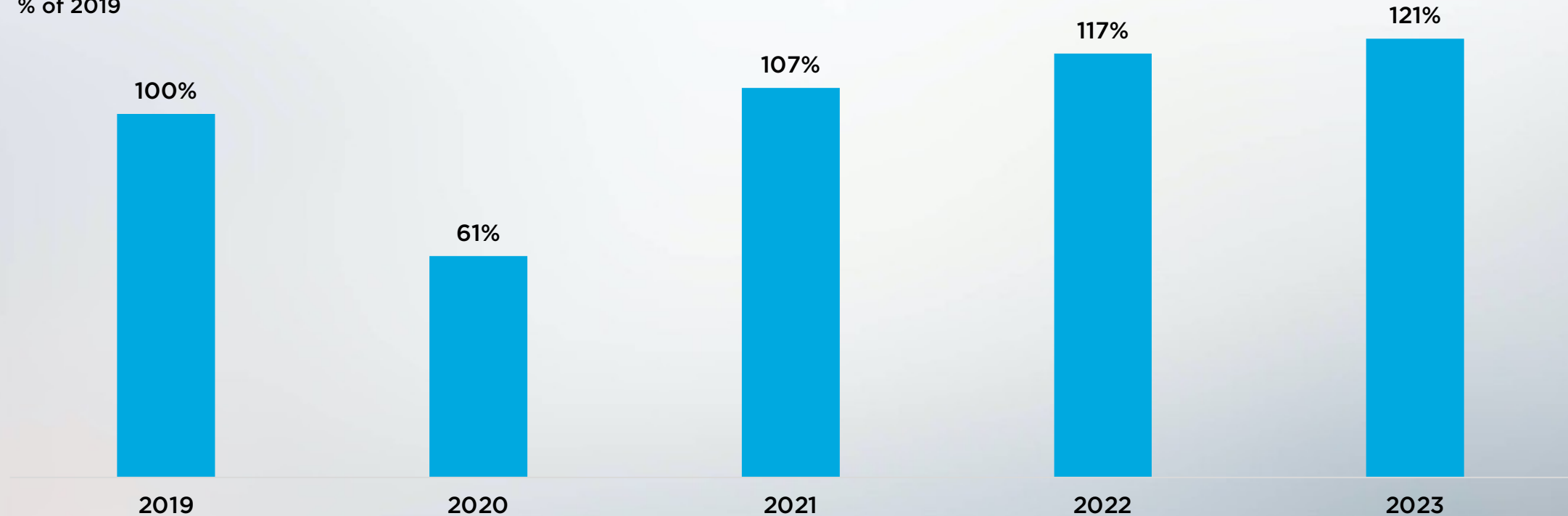
Visitation in 000s



Mexico: Operating air capacity



USA Inbound Operating Air Capacity from the Mexico
% of 2019



Research Updates

Mexico: 2023 Operating air capacity



USA Inbound Operating Air Capacity from the Mexico
% of 2019



Source: Sabre, October 2023
Brand USA's Mexico Market Outlook

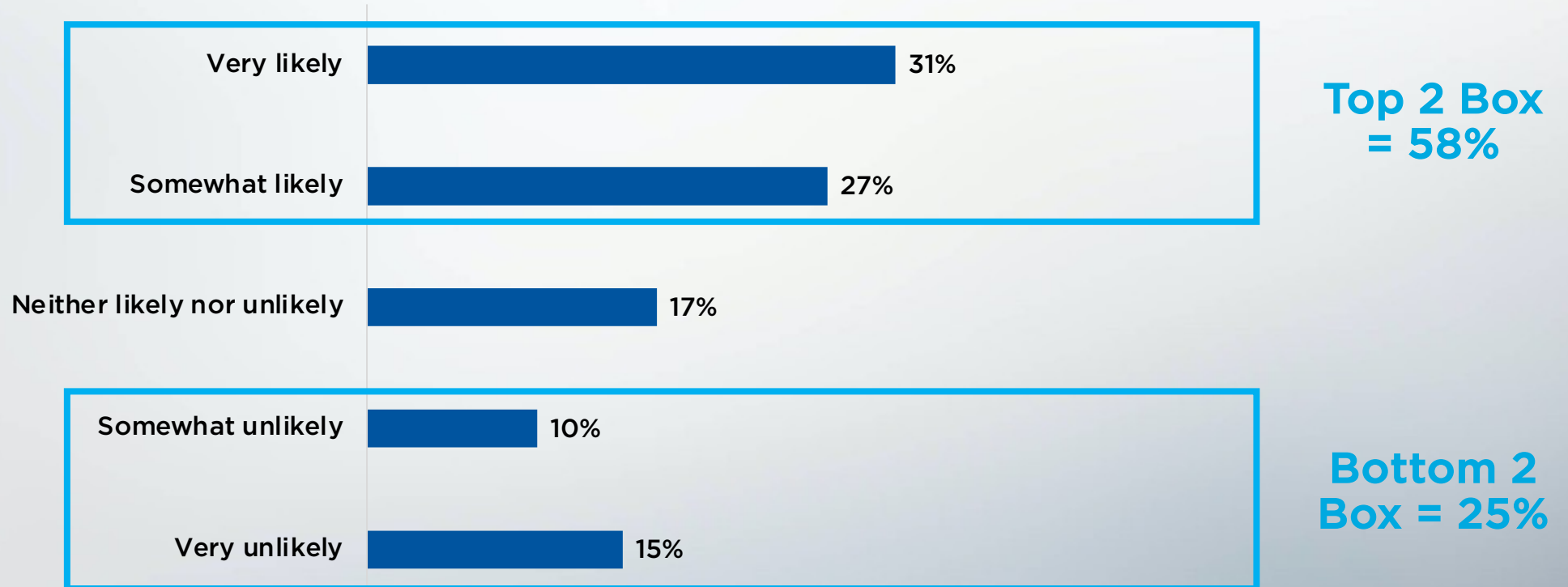
Mexico: 2023 Operating air capacity – Top 10 arrival airports

% of 2023 Seat Capacity



Research Updates

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



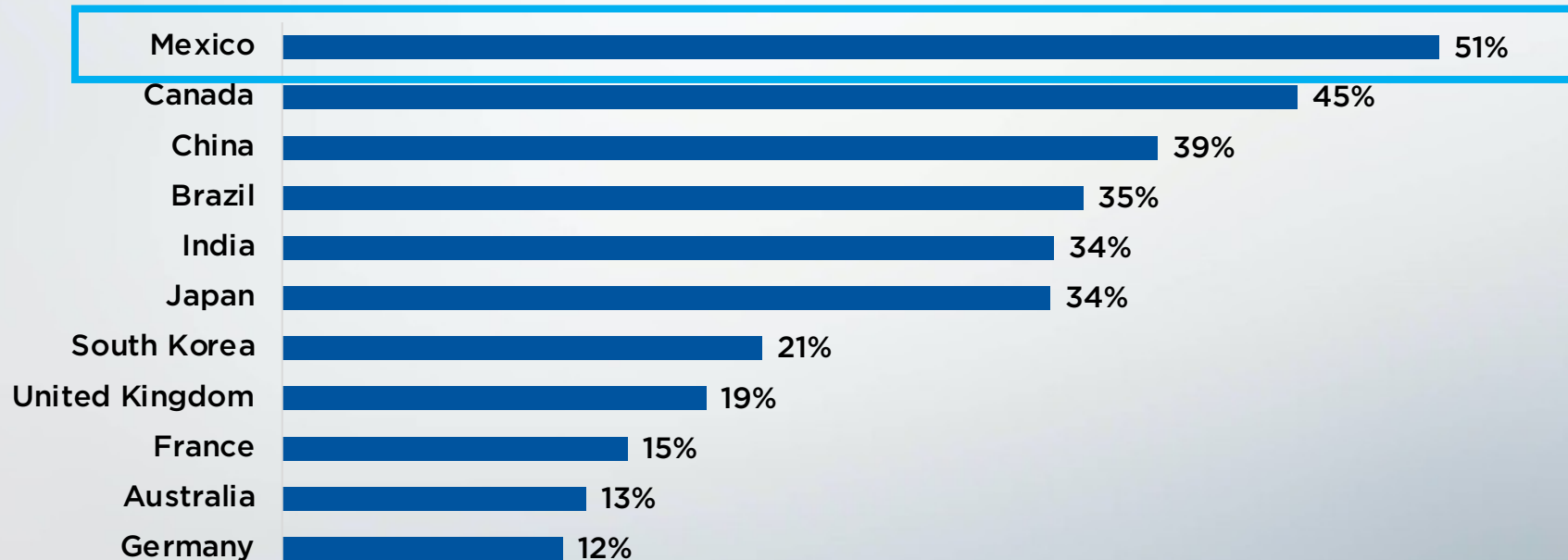
Question: How likely are you to take an international holiday in the NEXT 12 MONTHS?
Source: Brand USA/Big Village, Monthly Custom Study, October 2023
Brand USA's Mexico Market Outlook

Research Updates

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



% Likely to Travel to the US in the Next 12 Months

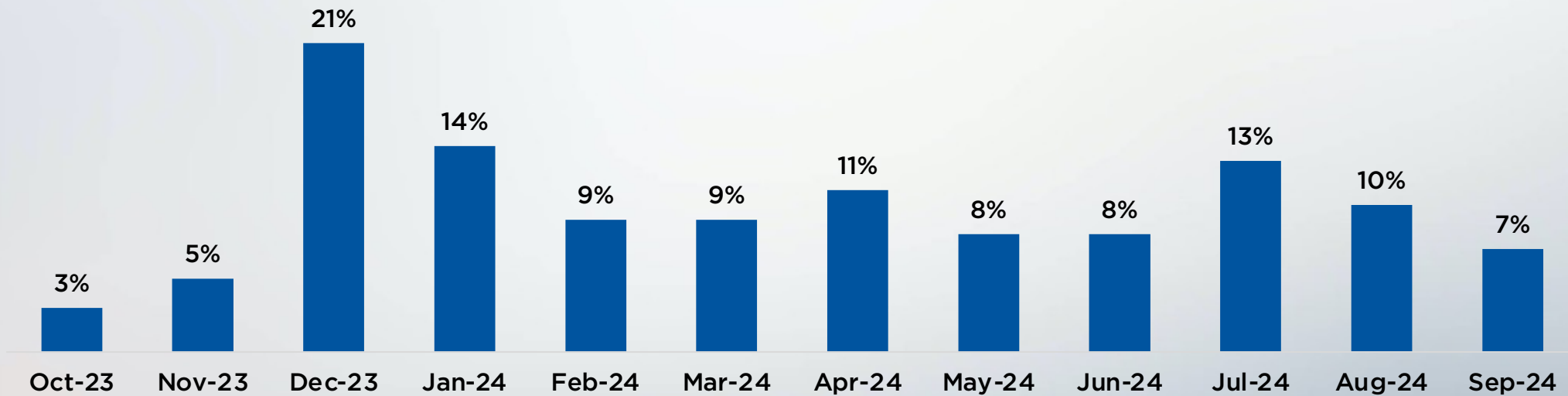


Question: In the NEXT 12 MONTHS, what country or countries will you visit on your international holiday(s)? Please select all that apply.

Source: Brand USA/Big Village, Monthly Custom Study, October 2023

Brand USA's Mexico Market Outlook

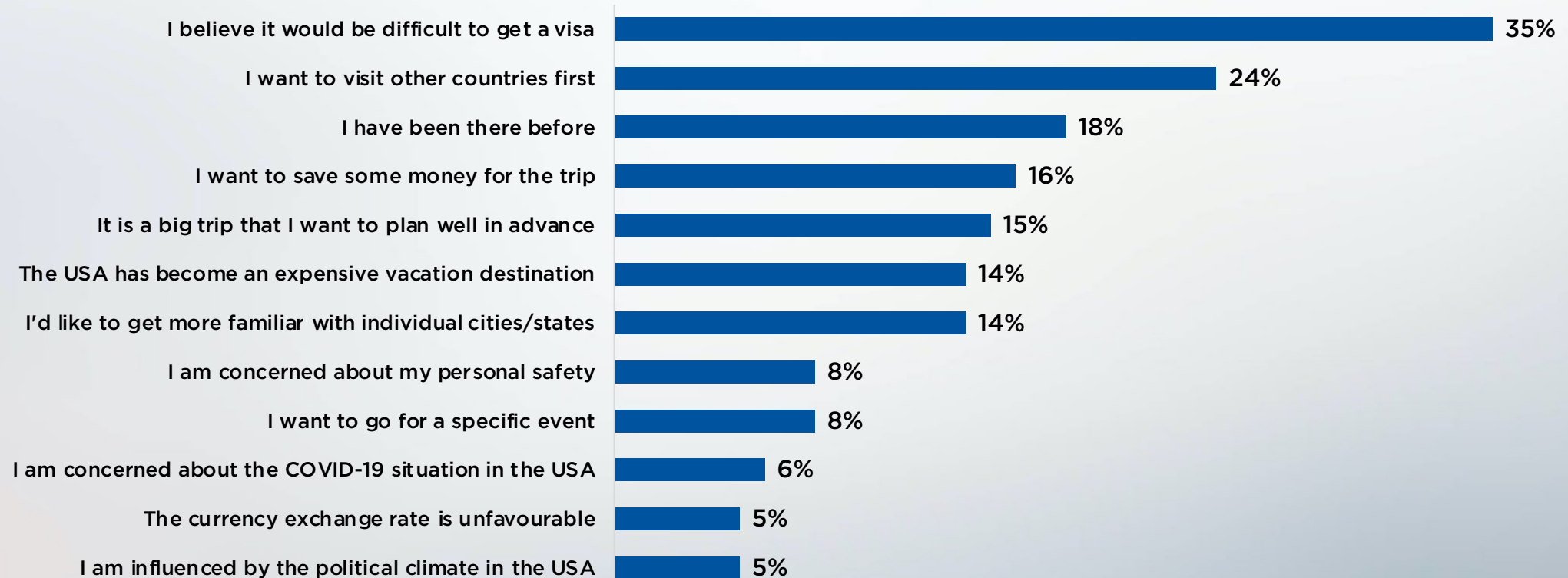
Mexico: Month of Travel to the USA



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, Monthly Custom Study, October 2023
Brand USA's Mexico Market Outlook

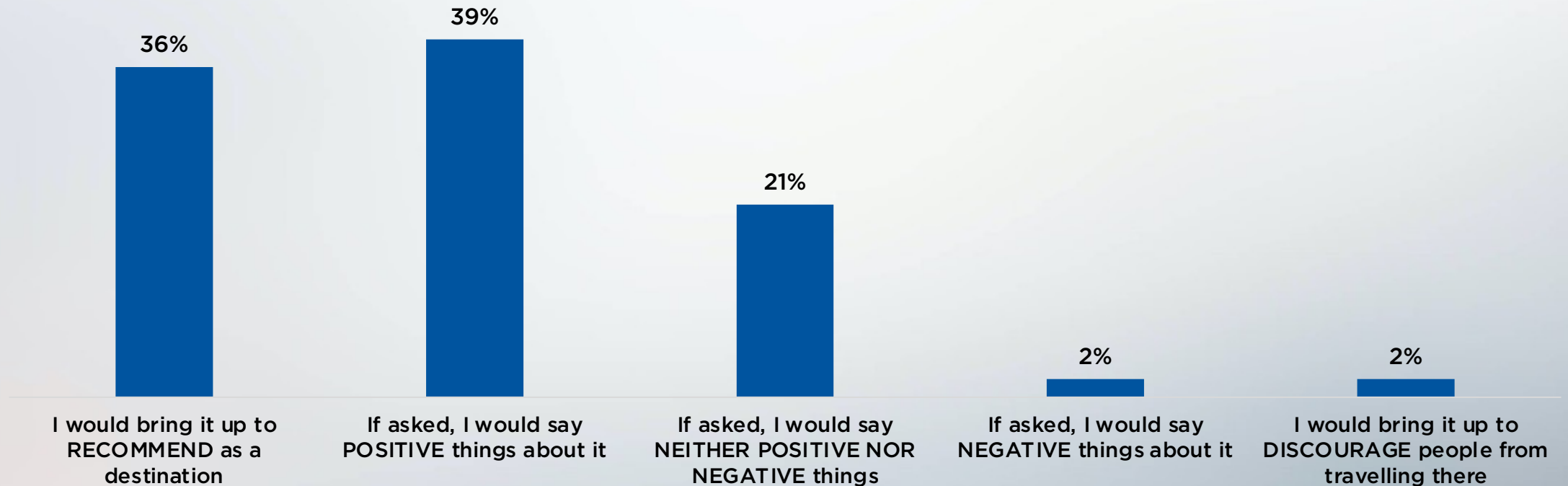
Mexico: Deterrents to Visiting the USA



Question: "Why is the United States not a likely holiday destination for you in the next 12 months?"

Source: Brand USA/Big Village, Monthly Custom Study, October 2023
Brand USA's Mexico Market Outlook

Mexico: Attitude towards the USA as a holiday destination



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, Monthly Custom Study, October 2023

Brand USA's Mexico Market Outlook

Mexico: The USA as a holiday 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, Monthly Custom Study, October 2023

Brand USA's Mexico Market Outlook



Consumer Updates with Clemen Hernandez, Senior Manager, Media Planning



Consumer Updates

Integrated Marketing Strategy for Mexico



Objective: Increase Visitation / Visit Frequency

Integrated Marketing Strategy



Brand USA



Timing In-Market



Based on peak planning window in-market

		FY24 Flighting by Campaign											
		O	N	D	J	F	M	A	M	J	J	A	S
Mexico	Branding												
	Education												
	Shopping												
	Booking	TBD											

Consumer Updates

Traveler Journey by Phases



Branding & Inspiration

Drive Reach & Top of Mind Awareness

- CTV
- Pre-Roll
- Meta
- TikTok

Education

Increase Familiarity & Consideration Through Content

- Pre-roll
- Meta
- TikTok
- Content Collaboration with publishers

Shopping

Increase Intent Through Visitation

- Google Search
- Display ads
- Meta

Booking

Drive Incremental booking to the USA

- OTAs
- Display

New in 2024



Content Collaboration

Will be used to leverage trusted brand-voices to tell the Brand USA story to their fans/followers. They will work with us to create scalable, unique ideas through authentic and engaging content. This content will live in the education phase of the journey to further increase familiarity of the US. Publisher collaborators are still being finalized, here are few examples we are considering.

- ESPN
- Televisa
- Discovery en Español

Copa América 2024

A 25-day premier competition tournament highlighting top soccer teams across various Latin American countries. Final matches will be played across multiple US cities giving Brand USA the opportunity to bring awareness and increase intent to travel to the US by activating media across Mexico and South America.



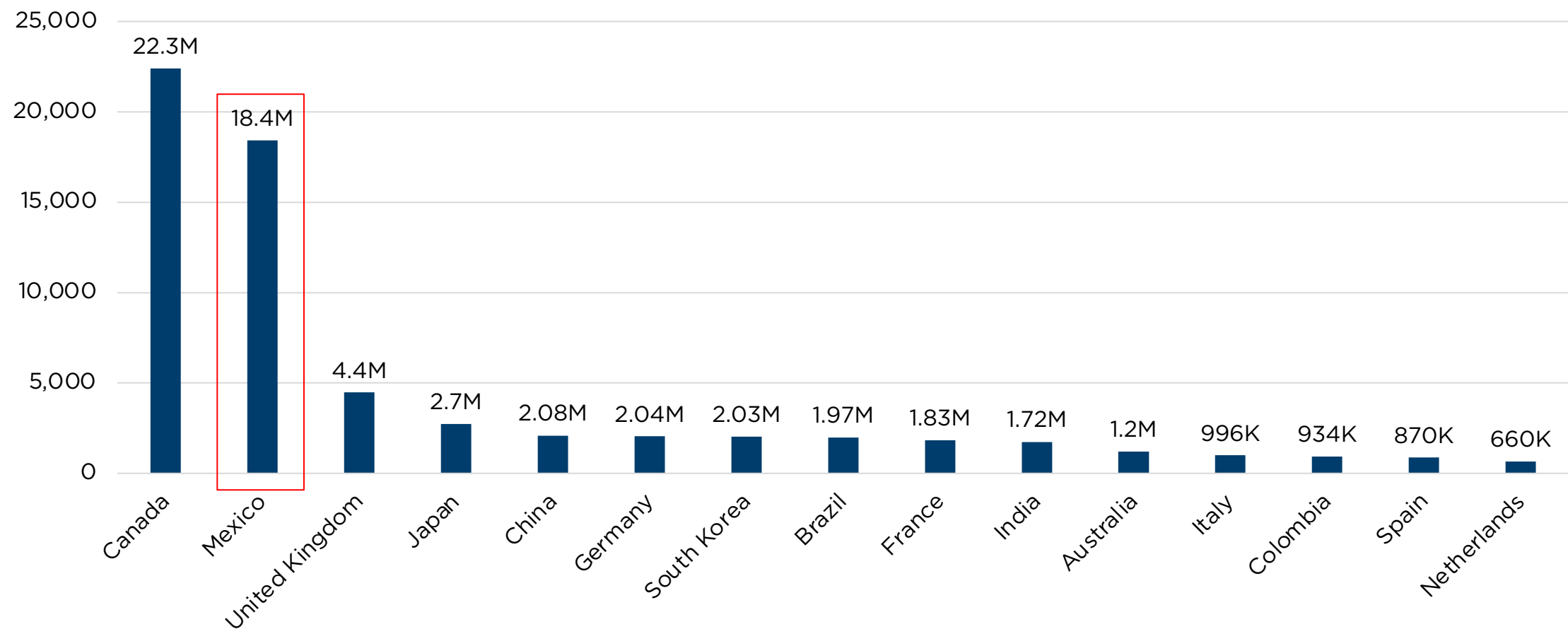
Mexico Trade Update with Lisa Tejeda, Senior Manager Global Trade Development - LATAM



Reasons to participate in Brand USA travel trade programs in Mexico

- A. Mexico ranks as the second largest source of international visitors to the U.S. with 12.5 million visitors in 2022.
- B. Strong air connectivity, allows Mexican visitors to travel to popular and lesser-known U.S. destinations.
- C. Mexico's favorable exchange rate and proximity increases their purchasing power.
- D. The Mexican traveler demographic is primarily Gen X, Millennial, and Gen Z. They are a digitally engaged audience, that are strongly influenced by social media and streaming services providing opportunities for promoting U.S. destination.
- E. Mexican tour operators are open to learn and promote new U.S. destinations. They are interested in sporting events (NFL, the 2026 World Cup) and festivals.
- F. Mexicans travel for cultural tours, culinary experiences, nightlife, outdoor adventure, theme parks, sports and entertainment which align with U.S. destination offerings.

2024 Inbound Travel Projections: Top 15 Markets



AIR CONNECTIVITY BETWEEN MEXICO AND USA



VisitTheUSA.com

Brand USA

● Volaris

● Viva Aerobus

● Delta

● Aeroméxico

CDMX

Salt Lake City
D.C.
Boston
Washington D.C.

Bajío / Querétaro
Mérida / Guadalajara

Atlanta
Detroit

AIFA

Mc Allen
Dallas

Monterrey

Atlanta
Salt Lake City
New York
Los Angeles

● United Airlines

CDMX

San Francisco
Houston
Chicago
Washington D.C.
New York

● American Airlines

Cancún

Cincinnati
Pittsburgh
Phoenix



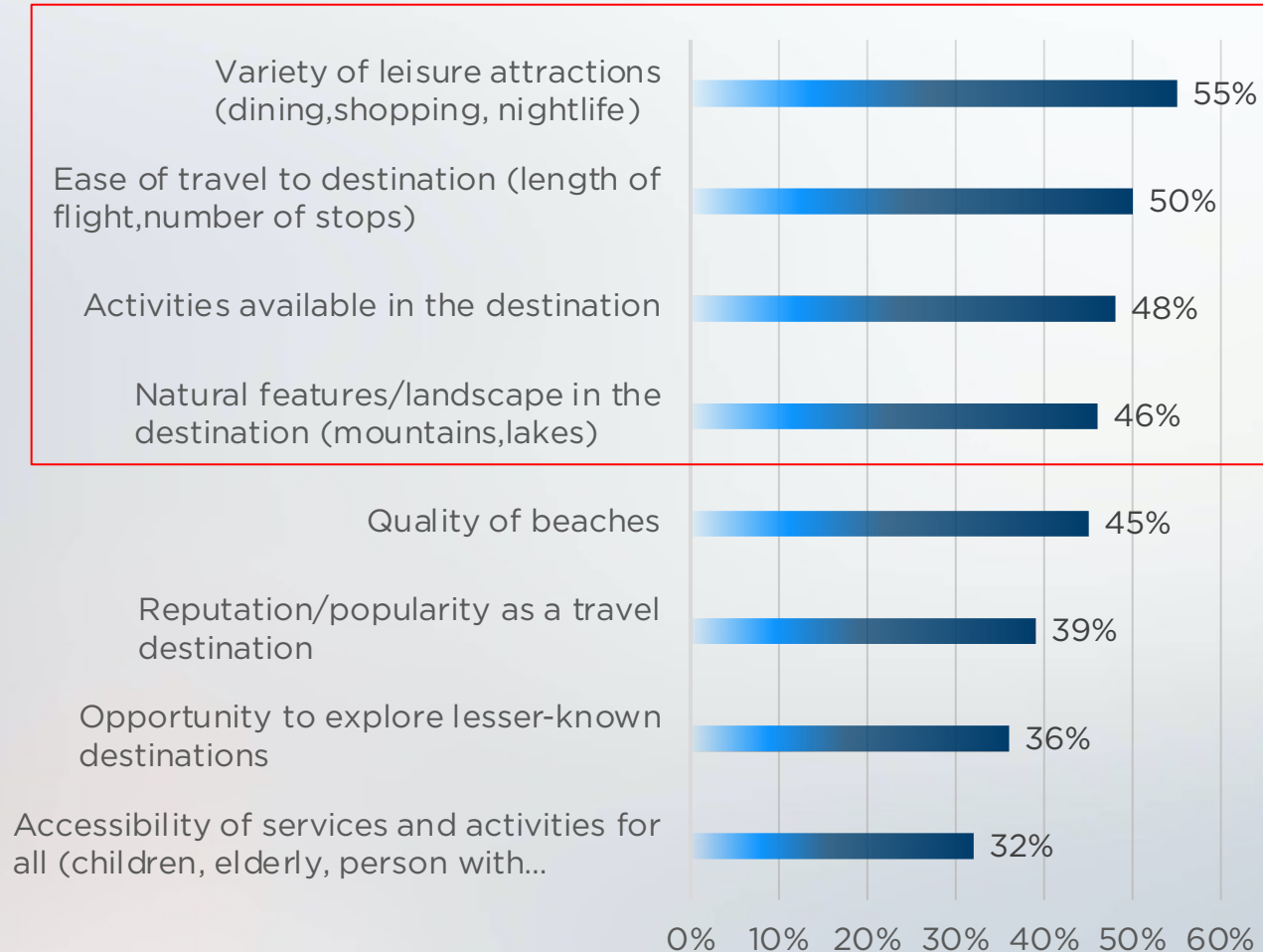
Current weekly flights: 2,055*
Mexico is planning 50 new routes
after regaining Category 1 for 2024.

*Airline partner's update Oct 2023

Trade Updates

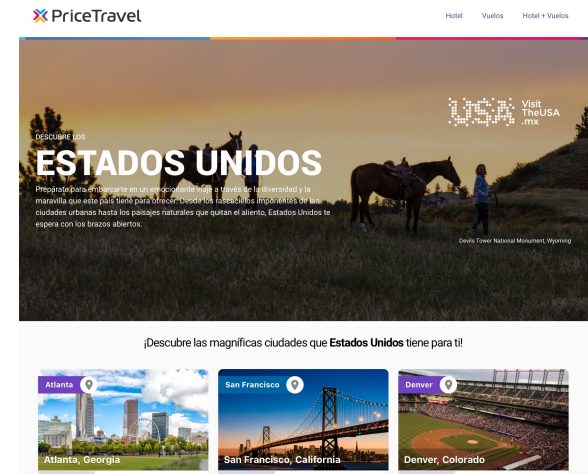
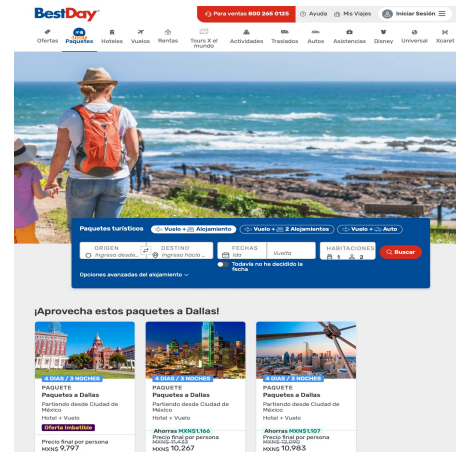
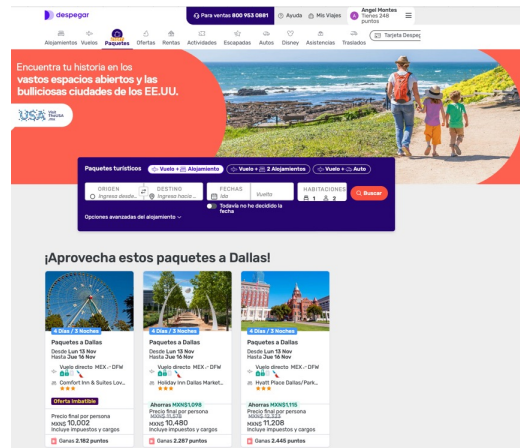
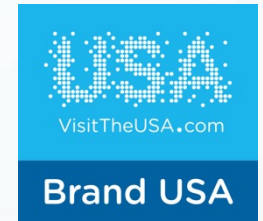
Importance of Destination Considerations

Mexican traveler's top 8 motivations for selecting an international destination:



Trade Updates

Co-Op Marketing Campaigns with Top Mexican Trade Partners

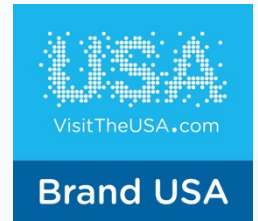


Nov 2022-Feb 2023
Total bookings:
1,572 (433 Packages/ room only 1139)
Flights: 2,590

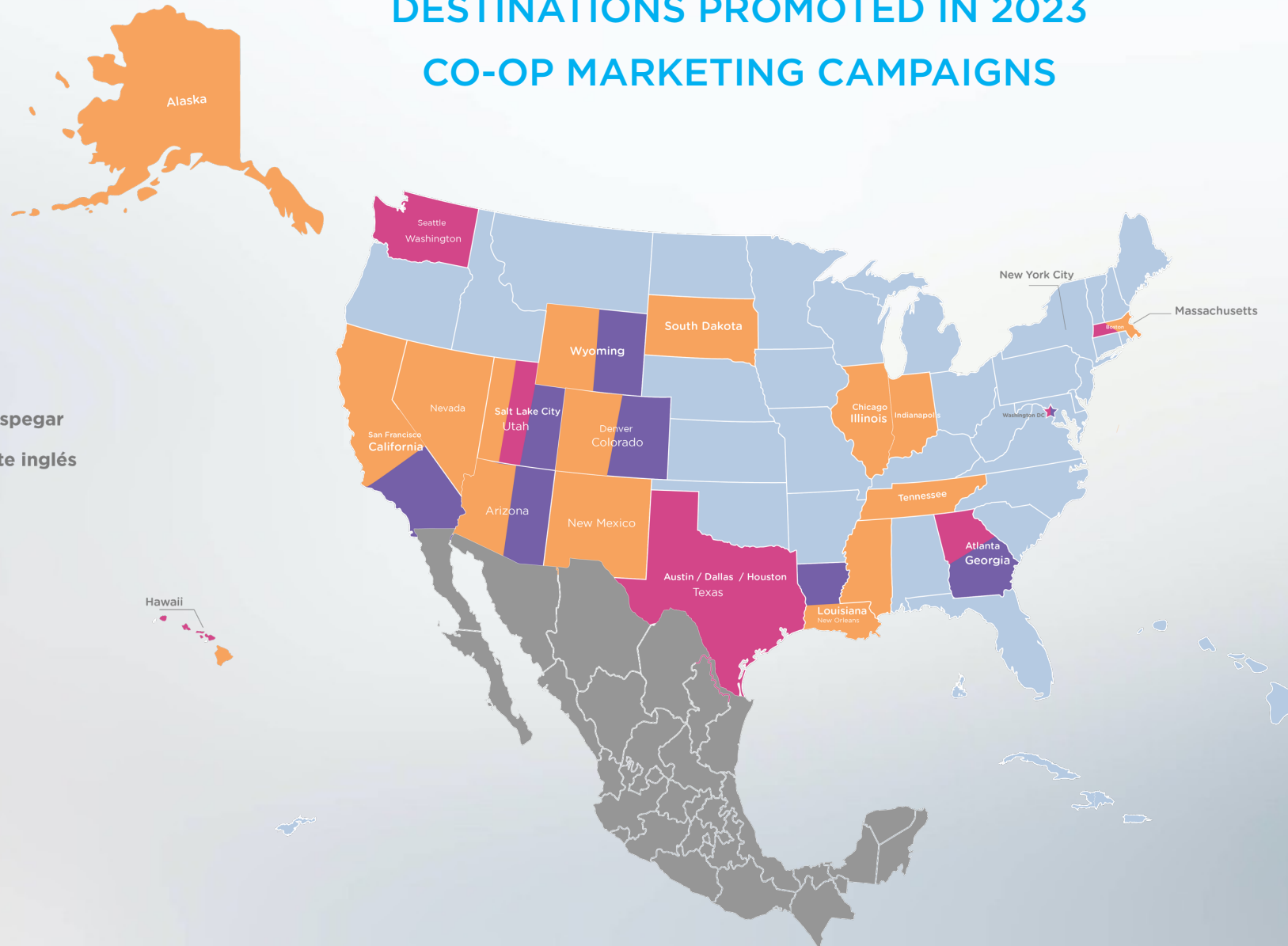
September 25- December 25, 2023
Results will be available by early 2024

DESTINATIONS PROMOTED IN 2023

CO-OP MARKETING CAMPAIGNS



- Price Travel
- Best Day/Despegar
- Viajes el corte Inglés



Trade Updates

Trade Events in FY2023



October 2022.
256 Travel agents
Tour Operators



September 2023.
74 Luxury Tour operator
and travel agencies



Summer edition, April 2023.
136 Travel agents
Winter edition, August 2023.
288 Travel agents



September 2023.
220 Director
members
Tour Operator
Travel Agents



September 2023.
166 Director
members
Tour Operators
Travel agents



May 2023.
134 Airlines
Travel agents

Agents trained: **1,274**



USA DISCOVERY PROGRAM

A total of 1,993 Mexican travel agents registered

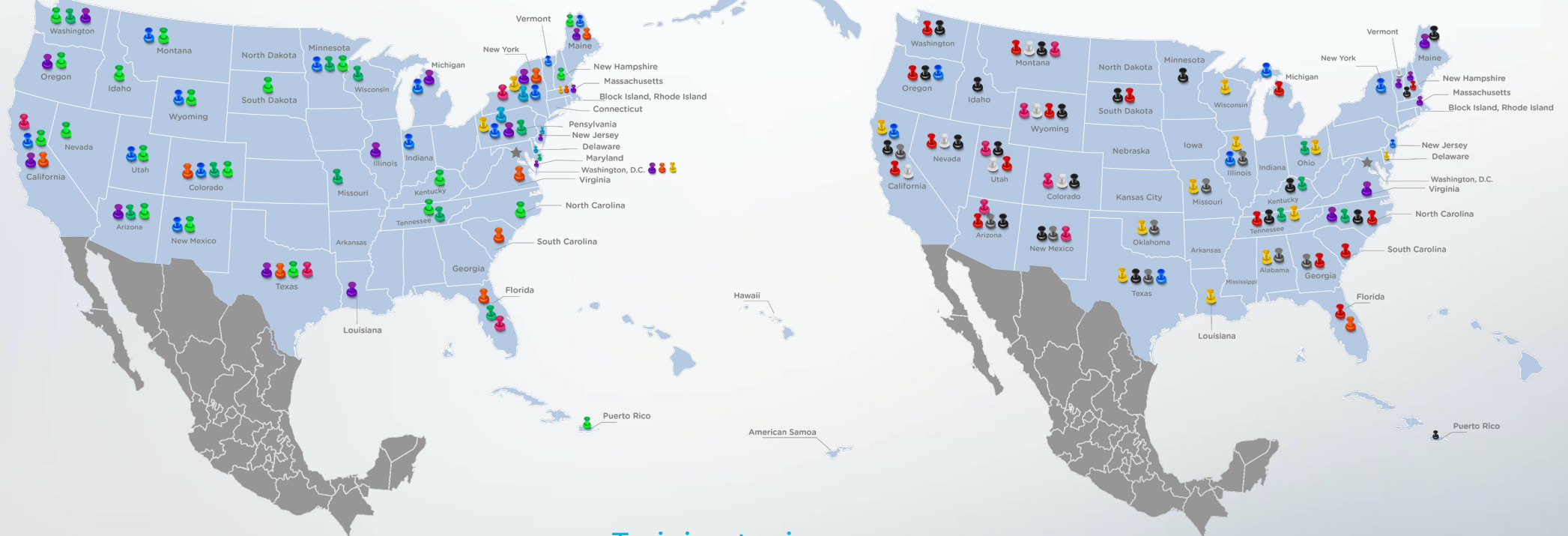
9,939 passed badges (October, 2023)



BRAND USA WEBINARS IN FY 2023

October - March

March - September



Training topics

- | | | | | |
|---|---|---|--|---|
| <p>October</p> <p> Horror sets in the United States</p> <p>November</p> <p> Thanksgiving Experiences in the U.S.</p> <p>December</p> <p> Winter activities in the U.S.</p> | <p>February</p> <p> Iconic cities</p> <p> Sports in the U.S.</p> | <p>March</p> <p> National Parks in the U.S.</p> <p> Shopping destinations in the U.S.</p> <p> Northeast Wine Trails in the U.S.</p> <p> Places to Ski in the U.S.</p> <p> Glamping in the U.S.</p> | <p>April</p> <p> Roadtrips in the U.S.</p> <p> Roadtrips to celebrate the Earth</p> <p> National Parks</p> <p>May</p> <p> Skyscrapers in the U.S.</p> <p>June</p> <p> Summer getaways</p> | <p>July</p> <p> Music routes in the U.S.</p> <p>August</p> <p> Craft beer mecas</p> <p>September</p> <p> Falling for autumn flavors and colors</p> |
|---|---|---|--|---|

TRAVEL REPORT/TRADE MEDIA PROJECT



Brand USA

November



Thanksgiving

December



Extraordinary Experiences

January



Destinations to start 2023

February



NFL Experiences

March



Glamping Experiences

April



Family Vacations

May



Wineries in the U.S.

June

 LGBTQIA+.

July



 Music Festivals

August

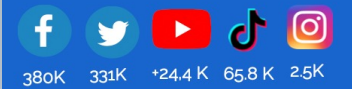


 Craft beers in the U.S.

September



Colors and flavours in Autumn



Brand USA Mexico Sales Mission 2023

January 30th – February 3rd

- U.S. partners: 22
- Travel agents trained: 216
- Tour operators: 39
- Total of trade appointments: 897
- Total of media appointments: +160
- Trade Interviews: 5
- Enrichment sessions: 2

[Link to video](#)



UPCOMING TRADE OPPORTUNITIES 2024

Brand USA 2024 Mexico Sales Mission

January 29 - February 2, 2024

Mexico City & Guadalajara

Tour operators / Travel agents from Monterrey, Guadalajara, Mexico City and Bajío area

FAM Trips:

- Luxury (High End) (TBD)
- Winter Destination, February 2024
- Sports and Entertainment, June 2024



Quick Poll



In Mexico, what types of trade programs are you most interested in participating in this coming year?
(select all that apply)

- A. Sales Missions
- B. Host a FAM
- C. Be part of a Co-Op Campaign
- D. USA Discovery Program
- E. I'd like more information



Mexico Partner Programs

Julie Paulson
Sr. Manager of Partner
Marketing Programs





Televisa Media Program

Brand USA's Mexico Market Outlook

FY24 Televisa Media Program

Program Overview



Brand USA has partnered with Televisa to develop television and digital marketing campaigns to influence Mexican travelers.

TelevisaUnivision is a leading media company in the Spanish-speaking world and an important cable operator in Mexico, producing more than 90,000 hours of original programming each year.

CAMPAIGN KPIs



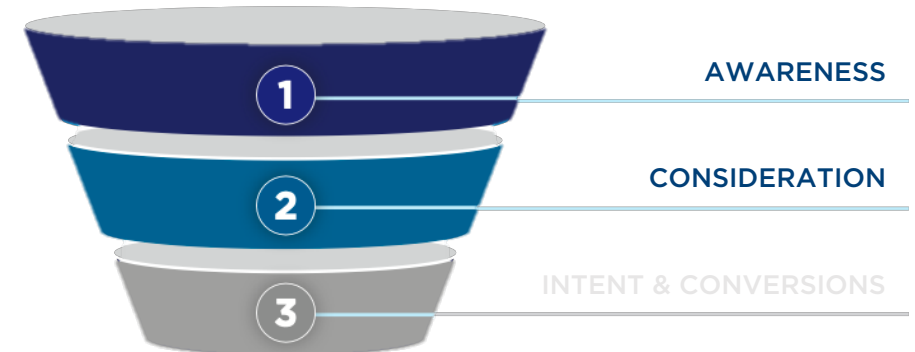
REACH
IMPRESSIONS



ENGAGEMENT
CLICKS/CTR

STAGE OF TRIP PLANNING

Upper funnel marketing campaign targeting the Mexico market



IN-MARKET DATES: ONGOING

COMMITMENT DATE: 6 WEEKS PRIOR TO LAUNCH

ASSET COLLECTION DATE: 4 WEEKS PRIOR TO LAUNCH DATE

CAMPAIGN LENGTH: 1-2 MONTHS

REPORTING: 4 WEEKS AFTER CAMPAIGN COMPLETION

Key Benefits



Televisa provides each Brand USA campaign more than three times the value of the paid media.



Social posts through Facebook reaching an audience of more than 8.4 million



Focuses on segments with the highest ability and propensity to travel: Families with children and the means to travel to the USA, plus affluent travelers



No. 1 leader in digital platforms in Mexico reaching 90% of Mexican internet users

Campaign Packages



MEDIA PACKAGES AND DELIVERABLES

CAMPAIGN TIER	PAY TV SPOTS TELEVISA NETWORKS	CABLE + SATELLITE TV CARRIERS IZZI + SKY SPOTS	BROADCAST SPONSORSHIP	DIGITAL IMPRESSIONS (VIDEOS + BANNERS)*	VIX IMPRESSIONS (STREAMING TV)	CONTENT PACKAGE (LANDING PAGE)	SOCIAL MEDIA POSTS (FACEBOOK)
Package 1	110	387	14	10,086,789	1,200,000	2	10**
Package 2	0	387	9	7,917,293	455,000	2	10**
Package 3	0	0	0	4,132,432	330,000	1	5

FY24 Televisa Media Program

Pay TV – Televisa Networks



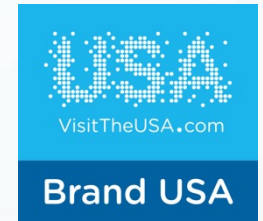
Televisa Networks is the dominant player in the Pay TV market with 25% market share.

Televisa Networks includes various channel genres like entertainment, live sports, movies, music and premium content (amine/gaming). Spots are run during daytime and prime time placements.



FY24 Televisa Media Program

Pay TV- Izzi and Sky



Izzi is a cable TV provider with more than 60 channels.

Sky is a satellite TV provider and represents 40% of the market share of subscribers (7.5 million).

Channels on these platforms include ESPN, AMC, A&E and Fox Sports2.

When Izzi & Sky providers are added to the plan, Televisa captures 64% of the Pay TV audience.



Broadcast Sponsorship



A broadcast sponsorship includes a mention of a destination during a TV show or sports segment.

The sponsorship includes 2 videos: 5 second starter and 5 second closer of the sports section.

The broadcast sponsorship runs on Foro, a news network similar to CNN.

Ex). *"This segment was brought to you by xyz."*



[Click here to watch the example](#)

FY24 Televisa Media Program

VIX Streaming TV



VIX is an OTT streaming service that allows Brand USA to reach a different audience than Televisa networks, Izzi and Sky.

The platform offers +40K hours of on-demand content and 106 live channels in addition to news and live sporting events.

The impressions garnered here count as digital impressions.

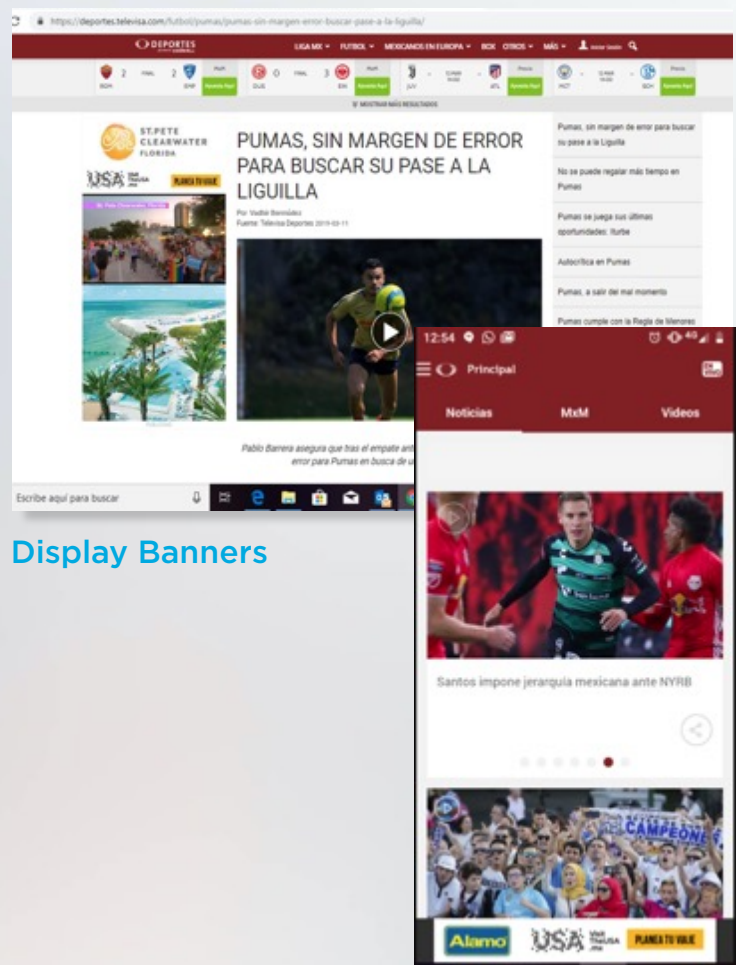


FY24 Televisa Media Program

Creative Examples



Brand USA

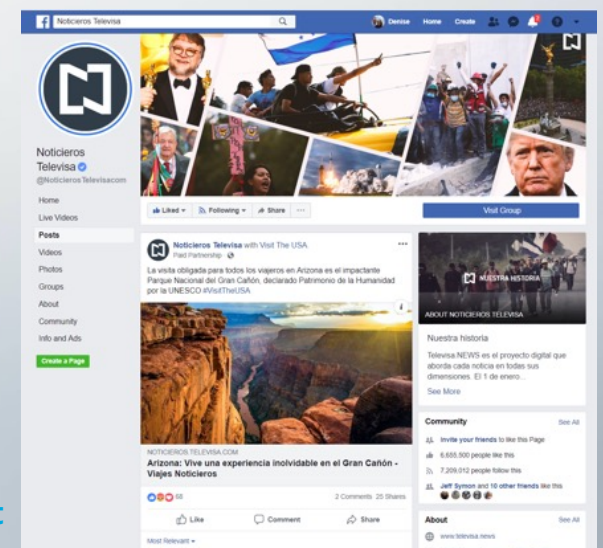


Display Banners

Visit the USA Content Hub



Social Post





PriceTravel

Brand USA's Mexico Market Outlook

FY24 PriceTravel Program

Program Overview



Brand USA is partnering with PriceTravel, one of the most recognized and innovative OTAs in Mexico, to provide multi-platform marketing campaigns to increase exposure in the Mexico market.

Brand USA offers robust post-campaign reporting including media metrics and bookings.

CAMPAIGN KPIs



REACH
IMPRESSIONS



ENGAGEMENT
CLICKS/CTR

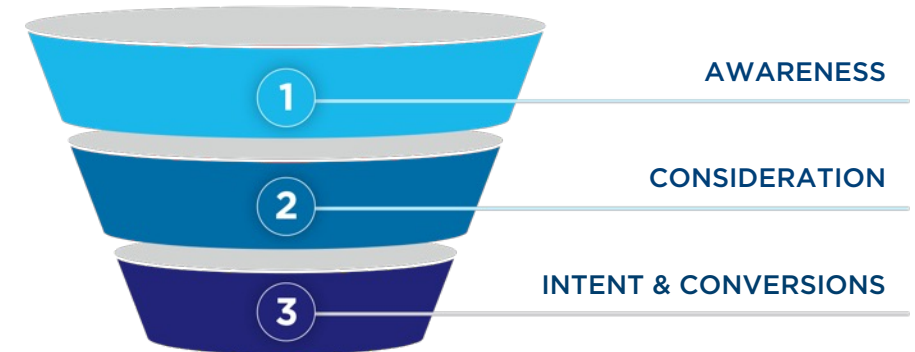


INTENT & CONVERSIONS
ROOM NIGHTS,
PAX, FLIGHTS,
BOOKING REVENUE

Brand USA's Mexico Market Outlook

STAGE OF TRIP PLANNING

A lower funnel program that drives direct bookings



IN-MARKET DATES: ONGOING

COMMITMENT DATE: 8 WEEKS PRIOR TO LAUNCH DATE

ASSET COLLECTION DATE: 6 WEEKS PRIOR TO LAUNCH DATE

CAMPAIGN LENGTH: 2-3 MONTHS

REPORTING: 45 DAYS AFTER CAMPAIGN COMPLETION

Key Benefits



Custom, dedicated USA landing page with products and booking engine.



FY23 Brand USA partner campaigns averaged a 23:1 ROI.



Multiple digital touchpoints to drive bookings.



Dedicated training webinar with Mexico travel agents.

Campaign Packages



Media Package 1 Campaign

DIGITAL MEDIA PROMOTION OWNED AND THIRD-PARTY CHANNELS	DESCRIPTION	EST. IMPRESSIONS/CLICKS
Third party media	Digital banners on external websites	1,834,000 imp.
	Search and display campaign on Google ads network	500,000 imp.
	Video Wall T1 or T2 Mexico City Airport	800,000 imp.
Own assets	PriceTravel.com display ads	2,970,000 imp.
	11 e-newsletters on Pricetravel.com	1,870,000 total recipients
	11 social media organic posts (Facebook and Twitter)	2,000,000 followers
	10 push notifications	690,000 imp.
	Robust & dynamic landing page with photo gallery, videos, content and product	N/A
	Destination guide, +2,000 words	N/A
	Magazine blog, +1,000 words	500 imp.
	Training/travel agents - 1 day webinar	90 agents
	Estimated total impressions	10,644,504

Campaign Packages



Media Package 2 Campaign

Media Package 2 Campaign		
DIGITAL MEDIA PROMOTION OWNED AND THIRD-PARTY CHANNELS	DESCRIPTION	EST. IMPRESSIONS/CLICKS
Third party media	Digital banners on external websites	1,614,000 imp.
	Search and display campaign on Google ads network	100,000 imp.
Own assets	PriceTravel.com display ads	2,700,000 imp.
	10 e-newsletters on Pricetravel.com	1,700,000 total recipients
	10 social media organic posts (Facebook and Twitter)	2,000,000 followers
	7 push notifications	483,000 imp.
	Robust & dynamic landing page with photo gallery, videos, content and product	N/A
	Destination guide, +2,000 words	N/A
	Magazine blog, +1,500 words	500 imp.
	Training/travel agents - 1 day webinar	90 agents
	Estimated total impressions	8,597,500

Campaign Packages

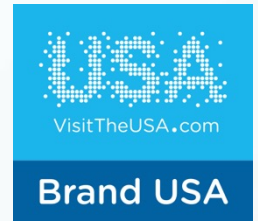


Media Package 3 Campaign

DIGITAL MEDIA PROMOTION OWNED AND THIRD-PARTY CHANNELS	DESCRIPTION	EST. IMPRESSIONS/CLICKS
Third party media	Digital banners on external websites	1,134,000 imp.
Own assets	PriceTravel.com display ads	2,700,000 imp.
	8 e-newsletters on Pricetravel.com	1,360,000 total recipients
	3 social media organic posts (Facebook and Twitter)	2,000,000 followers
	Magazine blog, +1,500 words	500 imp.
	Robust & dynamic landing page with photo gallery, videos, content and product	N/A
	Training/travel agents - 1 day webinar	90 agents
	Estimated total impressions	7,194,500

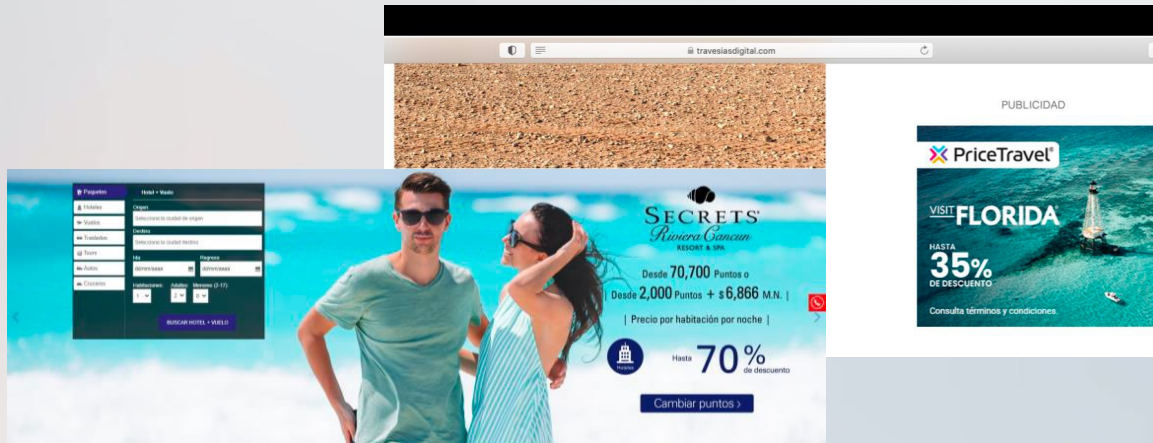
FY24 PriceTravel Program

External Website Examples

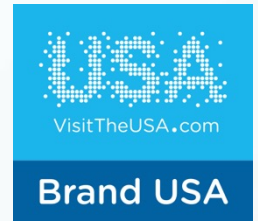


PriceTravel works with 3rd party sites during the campaign to maximize exposure.

- Ads on Liverpool (a retail site), HSBC (a bank site) and American Express (a bank site) link to their own landing pages
- Ads on Caras and Travesias (lifestyle sites) drive to a destination landing page on Price Travel



Out-of-Home (OOH) Examples



Out of home placement* includes a video wall placement in the international terminal in Mexico City Airport.

*Included in Package 1.



Placement example


FY24 PriceTravel Program


Landing Page Examples

A destination landing page is the hub of the campaign and is more conversion focused. This dynamic landing page features images, video, content and product.

Ads that drive to the landing page includes:

- E-newsletters
- Social promotion
- Push notifications
- Display ads on Caras, Travesias, and PriceTravel.com
- Search and display ads on Google


HotelVuelosHotel + Vuelos




Visita Orlando Florida

La Capital Mundial del Parque Temático.

Hasta 58% de descuento

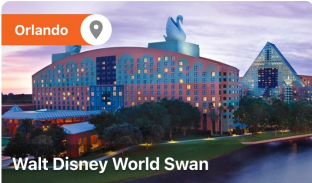


Ya sea que te encanten los parques temáticos y eres amante del entretenimiento, entusiasta de la comida, fanático de los deportes acuáticos, devoto al sol, admirador de las artes, o apasionado de las compras, aquí siempre tienes las puertas abiertas. Las posibilidades son infinitas.



Cualquier momento es bueno para visitar Orlando.

Orlando es un destino familiar por excelencia, famoso por sus opciones de diversión, su sol brillante todo el año y su fácil acceso a los parques temáticos de fama mundial. Pero no es solo eso, en Orlando hay mucho por explorar. Déjate cautivar por sus actividades al aire libre, ve de compras con las mejores ofertas, disfruta de un emocionante juego de fútbol americano y crea momentos que perduran y se renuevan en cada visita.




Walt Disney World Swan

Meses sin Intereses

Reserva Hotel Ver oferta

Hasta 58% de descuento




Walt Disney World Dolphin

Meses sin Intereses

Reserva Hotel Ver oferta

Hasta 58% de descuento



Orlando World Center Marriott

Meses sin Intereses

Reserva Hotel Ver oferta

Hasta 40% de descuento

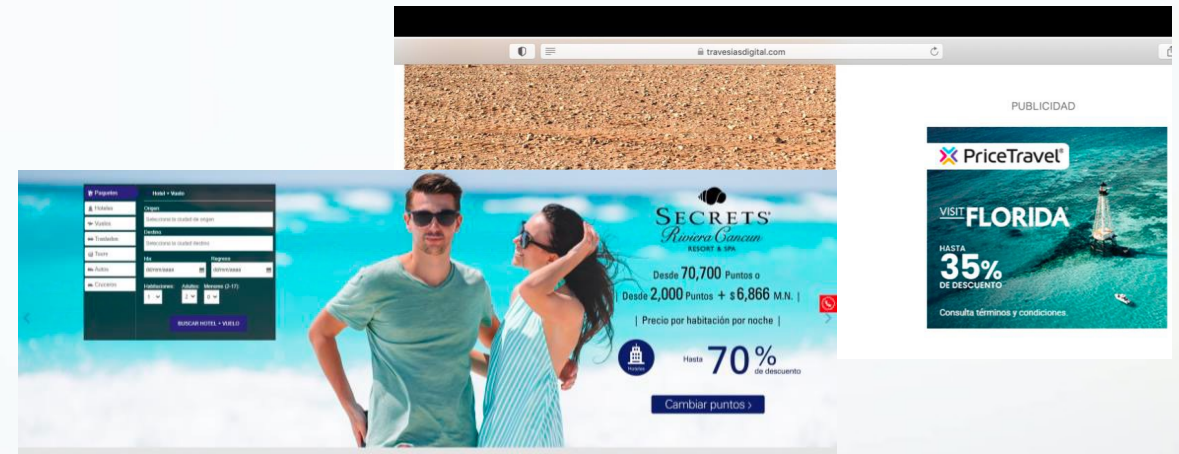
FY24 PriceTravel Program

Creative Examples

Push Notifications



Banner

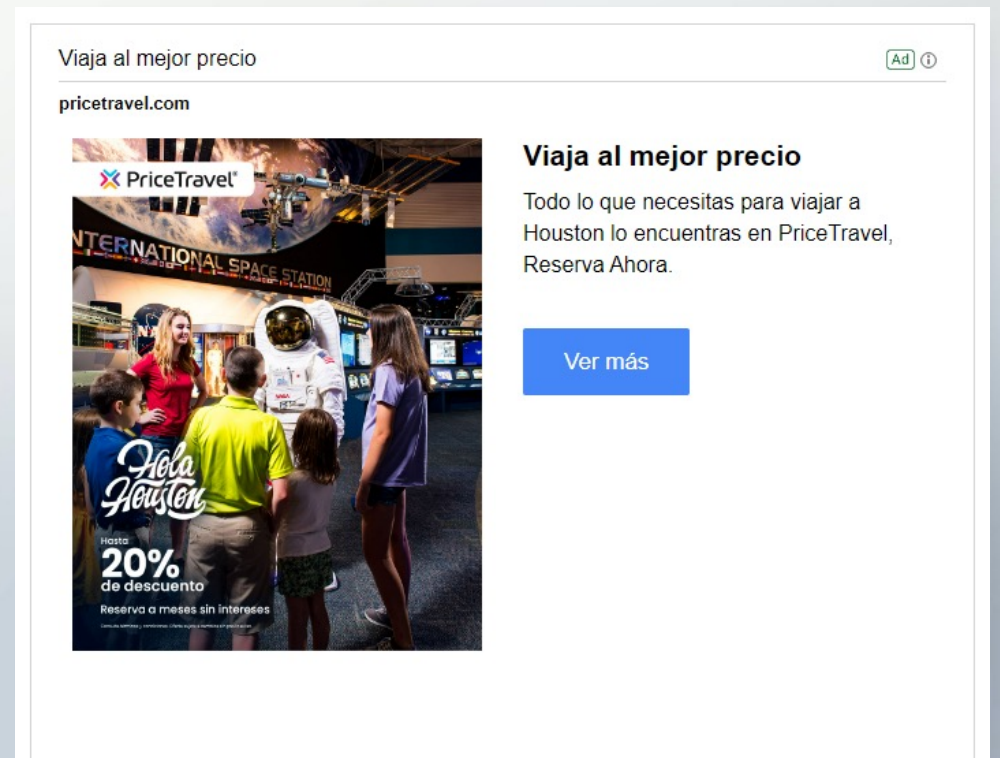


External Website

Social Media



Search and Display Google



Mexico Partner Programs

Additional Brand USA Programs



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



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



Quick Poll



What type of Mexico in-market support are you most interested in from Brand USA?
(select all that apply)

- a. Trade support
- b. PR support
- c. Influencer campaigns
- d. Awareness/inspiration level programs
- e. Activation/booking level programs



Last Important Updates

We hope to see you!

Upcoming Brand USA Activities*



January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	August ** 2024	September ** 2024
1/21-25: India Sales Mission	2/14-15: New Zealand Expos 2/22: Australia B2B	3/11-15: South America Sales Mission	4/12-18: Canada Mega Fam	5/3-7: IPW	6/3-7: Canada Sales Mission	7/8-12: Japan Sales Mission 7/15-19: South Korea Sales Mission		
1/29-2/2: Mexico Sales Mission								

*Tentative dates (subject to change)

**Stay tuned for more!

Brand USA's Mexico Market Outlook

We hope to see you!

Coming soon...



- Brand USA's Board of Director's Meeting
Wednesday, November 15
Register [here](#)
- Regional Insights: Learnings from 2023 Market Intelligence Study
Tuesday, November 28
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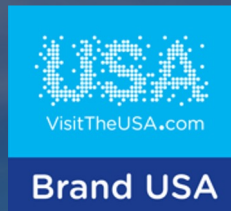


Quick Poll

?

Which LATAM market would you like
support in?
(select all that apply)

- a. Argentina
- b. Brazil
- c. Colombia
- d. Chile
- e. Mexico



Thank you!