

September 17, 2014





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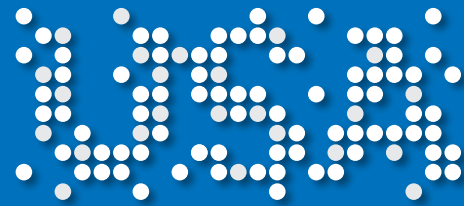
Barbara Richardson

Chair
Brand USA Marketing Committee



Agenda

- ◆ **Opening Remarks from Marketing Committee Chair, Barbara Richardson**
 - Call the Meeting to Order
 - Introductions: Management, Invited Guests, Legal Counsel
- ◆ **FY14 Progress**
- ◆ **FY15 Strategies and Program Highlights**
- ◆ **Discussion**
- ◆ **FY15 Planning and Business Plan Update**
- ◆ **Questions/Answers**
- ◆ **Adjourn**



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Chris Thompson

President & CEO



FY14 Highlights

● Partnerships and Funding

- 438 partners and growing (up from 89 in 2012, 339 in 2014)
- Maximizing the match—bringing FY14 to a strong close

● Consumer Campaign

- Consumer campaign in 10 markets—expanding to 14 in FY15
- Digital and social footprint in 11 languages

● Programs and Platforms

- Research significantly expanded to include market profiles, competitive set analysis, predictive, and performance tracking
- 100 new co-op platforms with more than 200 opportunities (and growing)—with 85% directly targeting the consumer
- Global PR has more than doubled in reach

● Trade Outreach

- International representation in 20 markets—expanding to 25 in FY15
- USA pavilions at 24 international shows in FY14—increasing to 30 or more in FY15
- Doubling the total number of events, sales missions, road shows, and MegaFams in FY15
- Expanding online training platform to 5 additional markets in FY15



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Tom Garzilli

Senior Vice President
Global Partner Marketing
& Acting CMO



Strategies/Tactics



FY15 Strategies

- **Build and Distribute Dynamic Content**
 - Engage and inspire travelers through storytelling that emphasizes experience and provides a call to action/booking opportunities
 - Great Outdoors and Urban Excitement (with a focus on culinary)
 - Culinary, Retail, Ski/Golf, Cruising, Road Trips, Attractions, Hotels
- **Continue to Expand Market Presence**
 - Right Markets, Right Time
- **Build and Leverage Industry Collaboration**
 - Harness the collective force of our partners to drive demand

FY15 Strategies

- **Create Value**

- For Consumers- Building strong calls to action and booking opportunities
- For Stakeholders- Continue to optimize opportunities for marketing and global outreach

- **Market the Welcome**

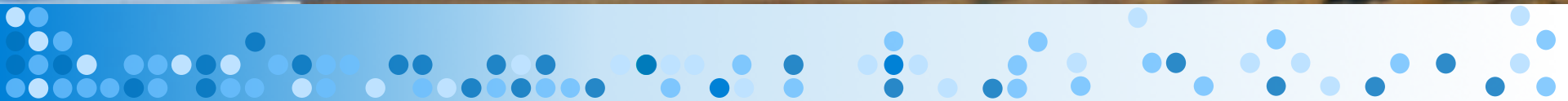
- Work with our federal agency and destination partners to communicate ease of entry and enhance the welcoming experience

- **Drive Results**

- Make market-driven decisions and track results based on sound research and analytics in order to increase incremental, visitation, spend, and global market share

A photograph of the Golden Gate Bridge in San Francisco, California, taken during sunset. The bridge's iconic orange-red towers and suspension cables are silhouetted against a warm, orange-hued sky. The bridge spans across the water, with a sandy beach and gentle waves in the foreground. The overall scene is peaceful and scenic.

**Be the USA's Primary
Storyteller and Inspirer to the World**



Great Outdoors

2015-16 Campaign

- The United States of Great Outdoors Content Hub and Social Platform- Fall 2014
- Giant Screen Film Launch September 2015
- Film premiere events for consumer and trade summer/fall 2015
- Multi-channel consumer and trade advertising throughout 2015
- Media spin-offs – TV series with Travel Channel summer/fall 2015



Discover America.com Explore Places Plan

THE UNITED STATES OF
Great Outdoors
BETA

EXPLORE ABOUT
U.S. National Parks The Movie

STORIES BY
Interest Destination

Our "Wild" Film in the Grand Canyon

BEHIND THE SCENES

Our "Wild" Film in the Grand Canyon

Wildlife: The 15 Most Adorable Animals in U. S. Parks

Adventures: One Brazil Blogger's Hunt for Terrifying Adventure

Nature: Which U.S. Park is Home to 50 Types of Butterflies?

Adventures: How Ben Ford Cooks the Perfect Park Feast

How to Get There: On the Rails: National Park You Can Reach By Train

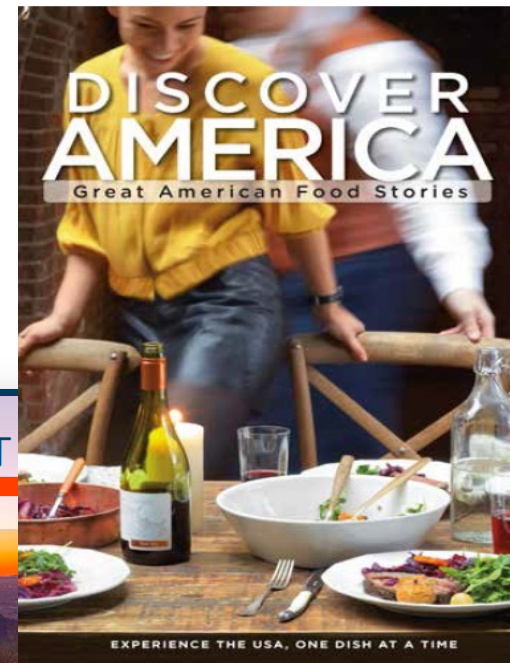
GREAT OUTDOORS HUB

National Parks, Beaches and Coasts, Zoos and Aquariums-Attractions, Camping and Fishing, Golf, Skiing, Gardens and Arboreturns, Scenic Byways, Recreation

Urban Excitement

Great American Food Stories

- **Culinary Guide**
Phase 2 with in-country promotions
- **United States of....**
Content Hub + Social platform
- **Multi-Channel Marketing Campaign**
in Canada, UK and Japan
- **International Food Network**
30 chefs, 30 days
vignettes air globally in July 2015
- **Travel Channel**
Jeni & Olli American Adventures
expanded episodes
- **Expo Milano 2015 May1-Oct 31**
25 to 30 million global travelers



A wide-angle, nighttime photograph of a city skyline. In the foreground, a body of water reflects the city lights. A road with light trails from traffic runs diagonally across the lower right. Palm trees and other vegetation are visible along the waterfront. The sky is a deep blue, and the city lights are warm and glowing.

**Expand and Enhance our
Global Market Presence**

Consumer Marketing Plan – Expanding to 14 markets that generate 81% of inbound travel to the USA



International Representation Expanding to 25 Markets



- | | | | | |
|---|---|---|--|--|
|  Adnova |  Brandmasters |  Connect Worldwide |  Ogilvy PR |  Pulse Communications |
|  Aviareps |  Black Diamond |  Gate 7 |  Sartha Marketing |  Expansion Markets |

Marketing Initiatives in 33 markets – combination of consumer campaign, co-op, or trade reaching more than 90% of inbound travel to the USA



Agency RFPs in Process

Global Advertising Agency of Record

Digital Development Agency

Social Community Management Agency

Digital Buying Agency

Digital Asset Management System



An aerial, high-angle view of Times Square in New York City at night. The scene is filled with a dense grid of yellow taxis and other vehicles. Pedestrians are visible on the sidewalks. Numerous large, brightly lit billboards and advertisements are visible on the buildings, including one for 'The Phantom of the Opera' and another for 'McDonald's'. The overall atmosphere is one of a busy, vibrant urban center.

Industry Collaboration and Value Creation

Brand USA

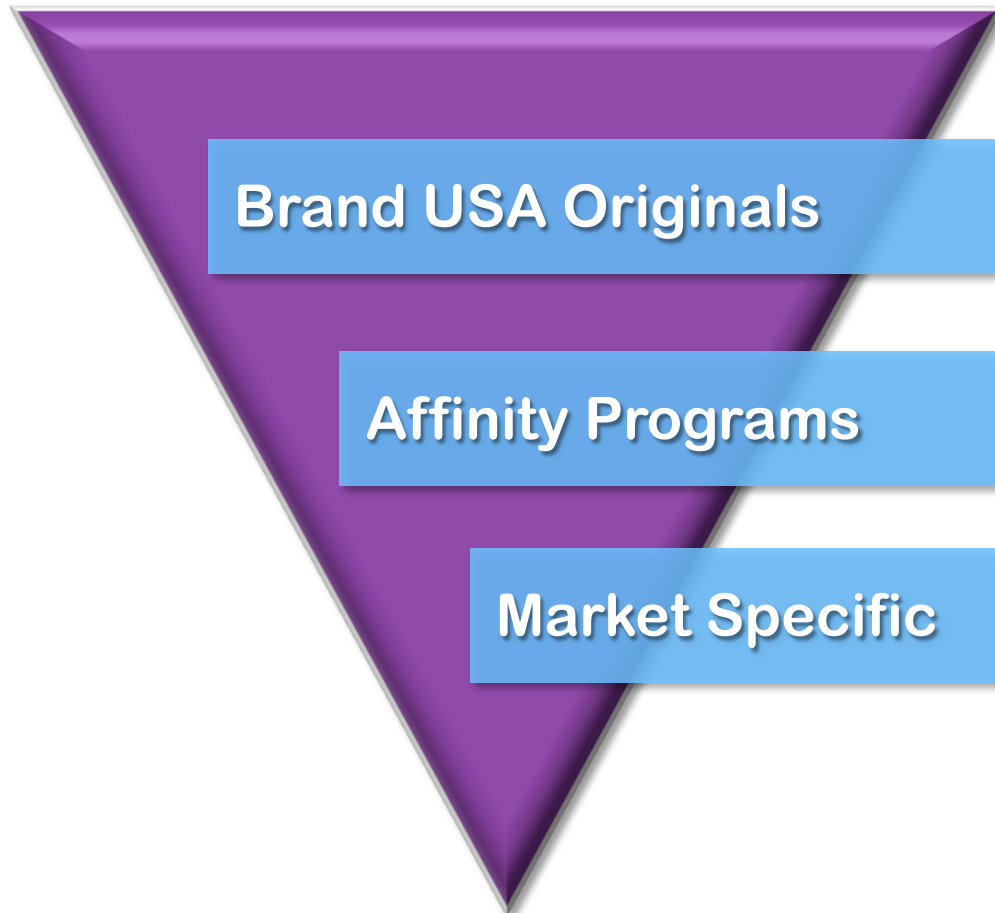
Industry Roundtables

- **Provide Feedback, Insight and Strategic Direction**
- **Bi- Annual Meetings- January and at IPW**
- **15 Members Each, based on Established Criteria**
- **Diverse Representation across Industry Segments**
 - CMO Roundtable
 - Partner Programs Roundtable
 - Market Development Roundtable



Three Paths to Value

- Deliver compelling content and valuable activation
- Leverage scale for efficiency
- Foster partnership and collaboration
- Create unique opportunities



A full-page background image of the Statue of Liberty on Liberty Island, New York. The statue is green and stands on a tall, multi-tiered stone pedestal. The sky is clear and blue. In the foreground, a large crowd of people is gathered on the island, and the water of the harbor is visible at the bottom. A semi-transparent dark grey horizontal band is positioned across the middle of the image, containing the text.

Marketing the Welcome

Market the Welcome

Trade Shows, Embassies, Arrival Halls

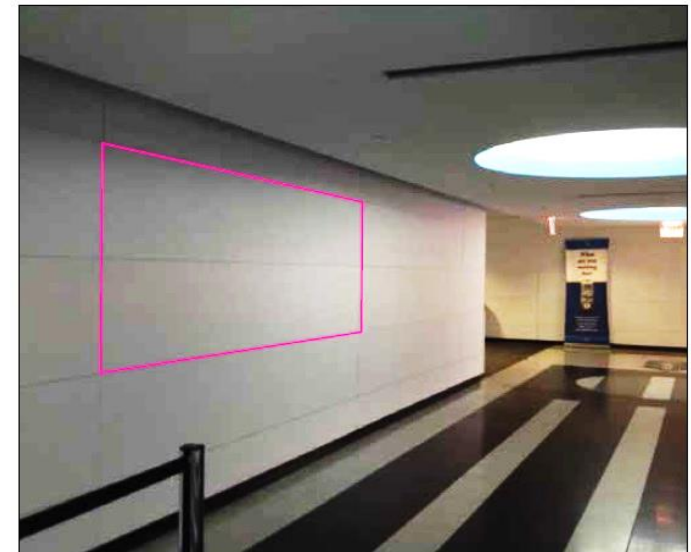
- **Enhanced Trade Show Strategy**

- Upgraded booths, partner presentation, touch screens and video

- **Arrival Hall Package for Airports, Embassies, and Destinations**

- Out of Home Elements
- Marketing and Entry Process Materials
- Video Components distributed via:
 - International arrival halls
 - Partner websites and airport websites
 - Embassy websites; ESTA website; other Federal websites abroad
 - Consular areas of embassies
 - In-flight video
 - DiscoverAmerica.com and thebrandusa.com

WELCOME TO
CHICAGO





Drive Results



Research & Analytics: Ongoing Activities

Performance Metrics

- Annual ROI study
- Campaign results, website/social reporting

Market and Media Prioritization

- Using projections and trend analysis to support budget allocation

Market Intelligence

- Primary consumer studies in 12 markets
- Analysis of acquired data and intelligence (TDM from Tourism Economics, Comscore, MIDT, etc.)

Ad and creative testing

- Post wave campaigns
- Ongoing creative testing

Partner Satisfaction and Intelligence

- Partner surveys and roundtable meetings



Brand USA

Brand USA: A Powerful Force in U.S. Economic Growth

Inspiring and influencing international travel to the United States.

Brand USA, the nation's destination marketing organization, delivered powerful results in fiscal year 2013. According to a study by Oxford Economics, Brand USA's initiatives in eight markets where it had fully deployed consumer, trade, and co-op marketing campaigns, contributed to a stronger more dynamic U.S. economy.

1.1 million
visitors

\$3.4 billion
in visitor spending



total impact on economy
\$7.4 billion

47:1

For every \$1 spent Brand USA generated \$47 for U.S. companies

53,181
new jobs supported

U.S. taxpayers pay **\$0** to fund Brand USA's marketing efforts

Sources: Oxford Economics, National Travel and Tourism Office, Bureau of Economic Analysis, Advance Passenger Information System. Download the full report: www.thebrandusa.com

An independent study conducted by Oxford Economics quantified the measurable benefits Brand USA delivered to the U.S. economy in its 2013 fiscal year ended September 30, 2013. **#BrandUSA**

* Australia, Brazil, Canada, Germany, Japan, Mexico, South Korea, United Kingdom

Research & Analytics: Special Projects

Project Phoenix

Dreamcatcher



Consumer focus groups
on perceptions of the
USA and the DMO value
proposition

Explorer



Quantitative study
focused on guiding
website development

Narrator



Creative development
workshops

Strong and Growing Consumer Engagement

Facebook

3.6 M
Fans

Facebook Engagement
(Avg Monthly)

1.5 M
engagements

YouTube

7.8 M +
video views

China Social

845 K
Followers

DA Page Views
(Avg Monthly)

1.2 M

DA Website Visits
(Avg Monthly)

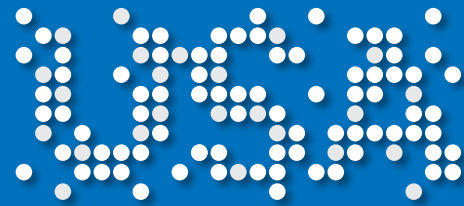
478 K

GoUSA Page Views
(Avg Monthly)

1.5 M

GoUSA Visits
(Avg Monthly)

650 K

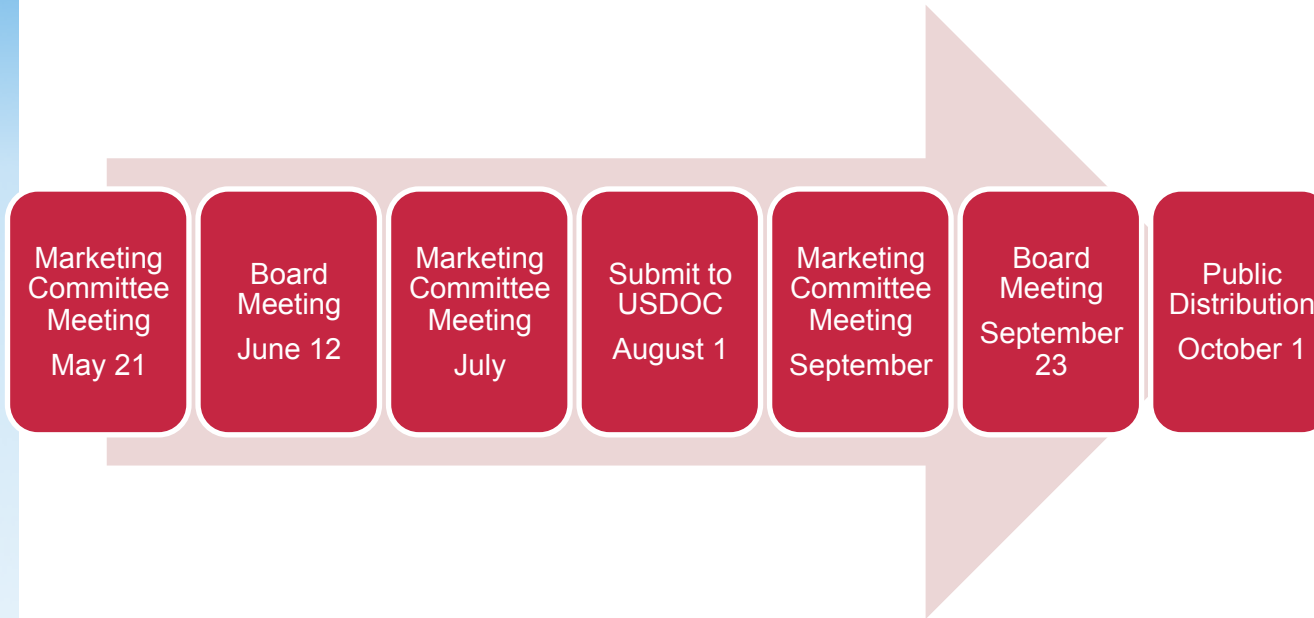


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FY 15 Marketing Planning Cycle





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Questions and Discussion



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Thank You!

Travel Industry Information

@BrandUSA on Twitter
TheBrandUSA.com

Consumer Information

@DiscoverAmerica on Twitter
Facebook.com/DiscoverAmerica
DiscoverAmerica.com