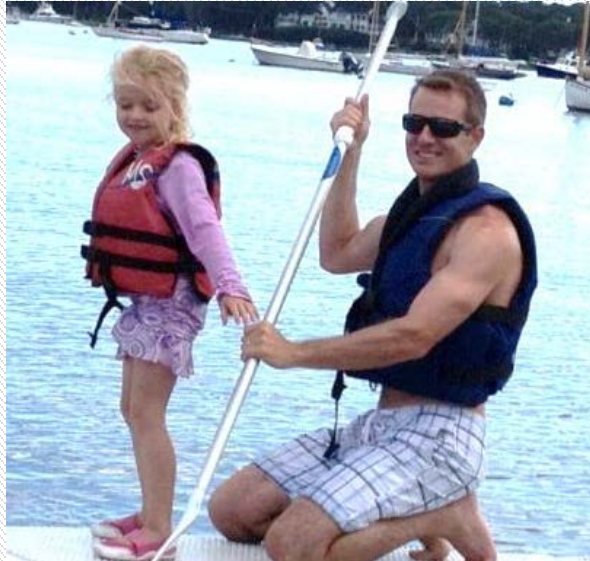




Today



Nate Huff

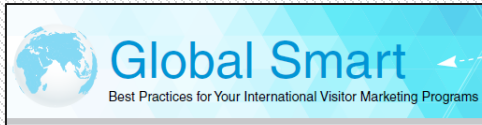
Senior Vice President,
Miles

Today

What We'll Cover

- International Opportunities & Challenges
- Traveler Decisions in Today's World
- An Update from the National Level
- Quick Look at Colorado Partnership with Brand USA

INTERNATIONAL MARKETING TOOL KIT: BUDURL.COM/DMAWESTGOINGGLOBAL



International Market Selection

There are a wide range of exciting international visitor markets offering growth. Work through these seven steps to decide the ones that you should focus on. Which markets offer you the best combination of:

- Size, Growth & Prospects - Which International Visitor Markets
- Air Routes, Capacity & Competition Including Easy U.S. Connections
- Which International Visitor Markets Best Suit You, Your Destination
- Readiness of Your Organization and/or Partners to Market To
- Leverage Brand USA, Dept. of Commerce and Trade Market Partners
- Relative Cost of Consumer and Trade Promotion In
- International Marketing Partnerships - Opportunity to



#1 Canada
23.4 million arrivals.
Moderate growth outlook.
Highly familiar with U.S. with strong air connections and a solid economy. A great "semi-domestic" international market to start in or build upon.

#2 Mexico
14.3 million arrivals.
Moderate outlook.
Mexico's economic growth and burgeoning middle (and upper) class are spurring real opportunities in this close neighbor.

#3 United Kingdom
3.8 million arrivals. Moderate outlook.
The UK has returned to after some years of slow visitors are often regular travelers - and different both the familiar and the path" U.S. experiences

#4 Japan

3.7 million arrivals. Modest outlook.
Despite sharp declines and uneven growth, Japan remains by far the biggest Asian market in US arrivals. It has a growing number of independent travelers, with a growing number of independent travelers and the second largest affluent travel sector in the world after the U.S.

#5 Brazil

2.1 million arrivals. Moderate to Strong outlook.
Economic and political challenges are now threatening a run of 10 years of double digit growth. Brazilians remain big spenders in retail and attractions.

#6 Germany

1.9 million arrivals. Modest outlook.
The economic "engine" of Germany are adventure travelers. They stay a lot (16 nights on average) and adventures from nature

#7 China

1.8 million arrivals. Strong outlook.
Already world tourism's No. 1 source market, China promises continued strong growth. For many destinations the challenge will be managing growth in the group market while targeting the affluent, FIT Chinese visitor for yield.

#8 France

1.5 million arrivals. Modest outlook.
Counter to a weak economy French visitors continue to arrive in record numbers. They are particularly fascinated by the "American lifestyle" and culture.

#9 Australia & New Zealand

1.6 million arrivals. Moderate to Strong outlook.
World champions at global travel "Aussies" and "kiwis" continue to arrive in record numbers. Strong, repeat visitors, they often seek experiences well beyond the gateways.

Destination Analysts

The State of International Travel: A Peek into the Future

Periscope Broad
February 2014



MARKET PROFILES

- The 8 Essentials of Successful Content Marketing
- Content Distribution with the Hyper-Informed Traveler
- Top Tips for Content that Travels Well
- The Three Broad Channels of Content Marketing & Distribution



Miles is the official marketing partner of Brand USA – the national tourism marketing organization for the United States of America. Miles works with Brand USA to develop and sell a range of co-op marketing programs across international visitor markets for industry partners to invest in. For more see: www.MilesPartnership.com/BrandUSA



GOING GLOBAL

Global Opportunities

miles
marketing destinations

2014 Figures



Source: US Travel Association, 2014 Figures

2015 Figures



1.2
Billion
International
Visitors

\$1.3
Trillion
International
Visitors
Spending

Source: World Travel & Tourism Council, 2014 Figures

International Travel Spending



≈ 20%

Source: Global International Traveler's Spending \$USD as an approx. percentage of all visitor spending (Domestic & International)

US Travel Association, 2014 Figures.

THE
CARNEGIE
PAPERS



IN SEARCH OF THE GLOBAL MIDDLE CLASS

A New Index

Uri Dadush and Shimelse Ali

INTERNATIONAL ECONOMICS | JULY 2012

CARNEGIE ENDOWMENT

FOR INTERNATIONAL PEACE

International Growth of the Middle Class

MIDDLE CLASS CONSUMER SPENDING

OUTER RING: 2030 in trillions, USD (projected)

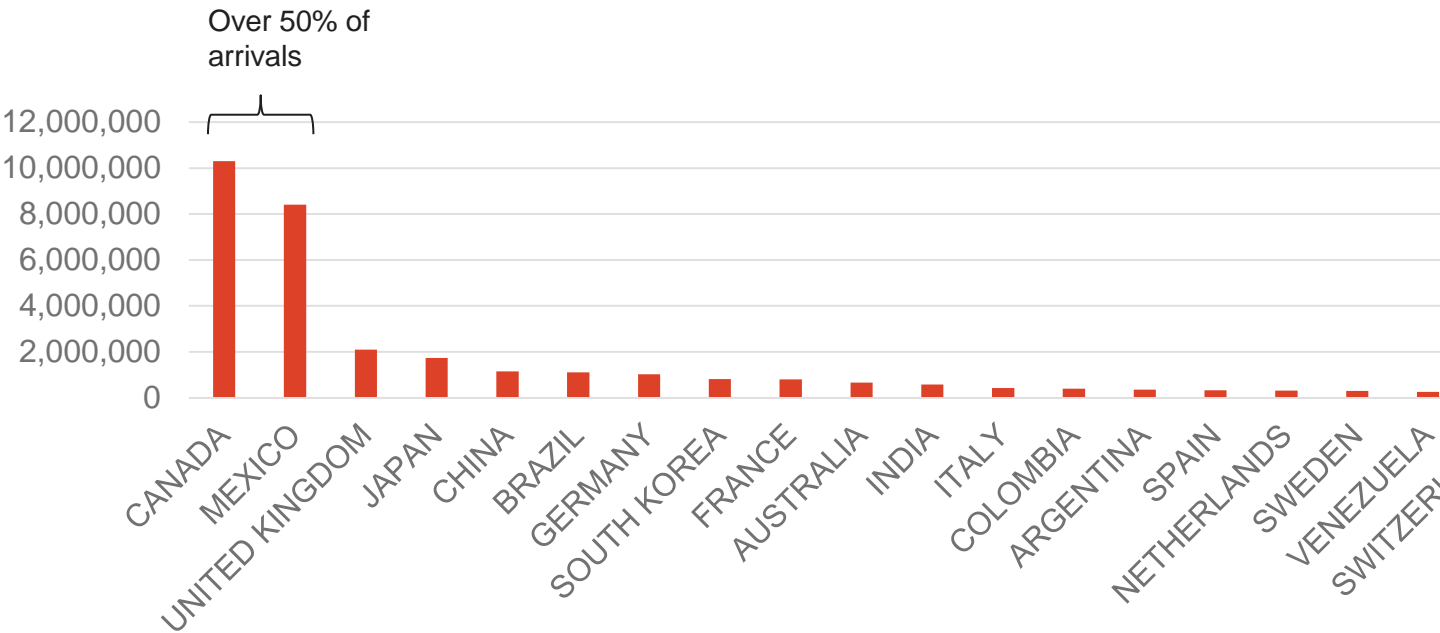
INNER RING: 2009 in trillions, USD



Most Desired Destinations

| | 2014 | 2015 | RANK |
|----------------|-------|-------|------|
| Mexico | 39.7% | 65.2% | #1 |
| Brazil | 50.1% | 61.8% | #1 |
| India | 43.0% | 56.1% | #1 |
| Canada | 45.5% | 53.5% | #1 |
| Japan | 43.3% | 47.1% | #1 |
| United Kingdom | 32.2% | 44.3% | #1 |
| South Korea | 39.7% | 43.6% | #1 |
| Australia | 32.1% | 41.9% | #1 |
| China | 41.0% | 41.5% | #1 |
| Italy | 18.2% | 40.2% | #4 |
| France | 22.0% | 31.5% | #3 |
| Russia | N/A | 20.2% | #13 |
| Germany | 12.9% | 16.5% | #4 |

US Arrivals through June 2015

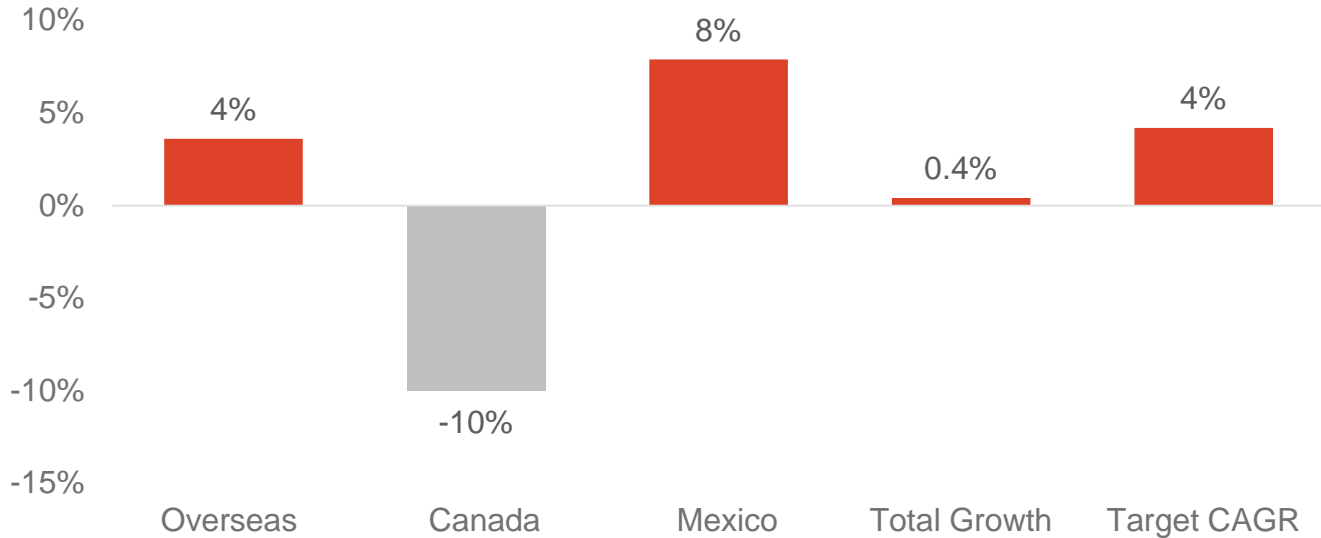


TOP 20 MARKETS
ALL MARKETS

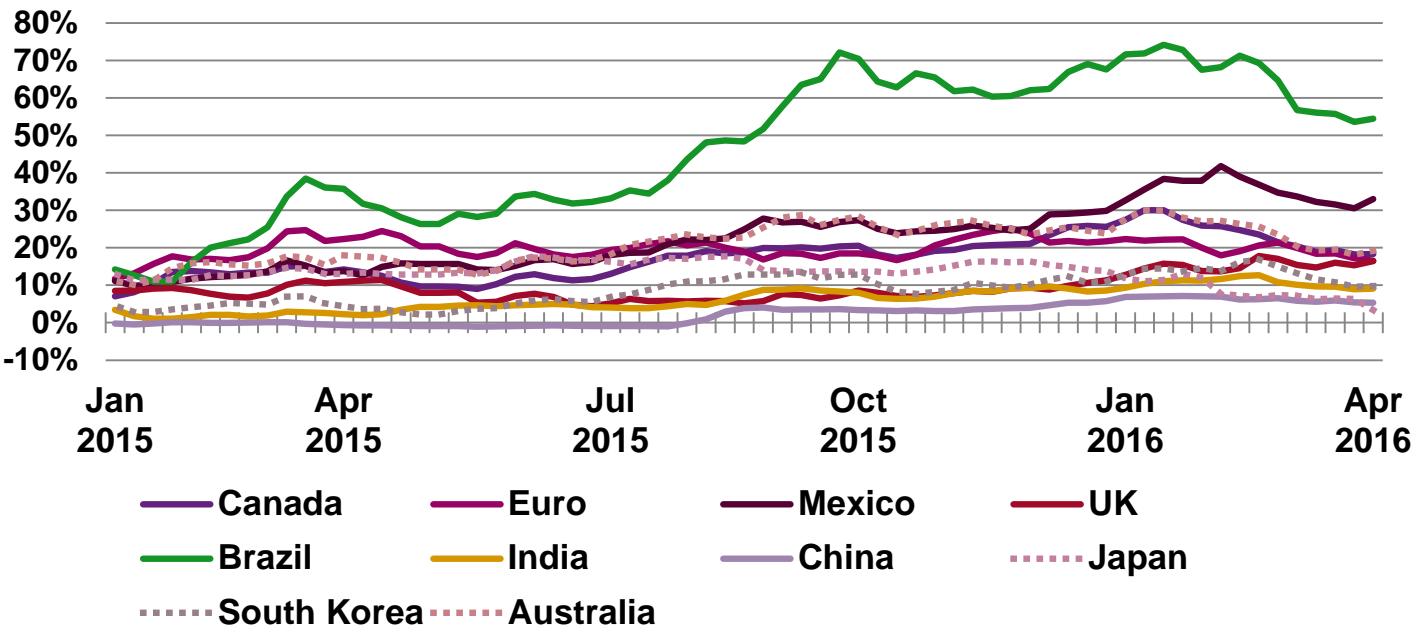
Arrivals
31,522,599
36,027,862

YOY Growth
3.4%
3.9%

Forecast for 2015

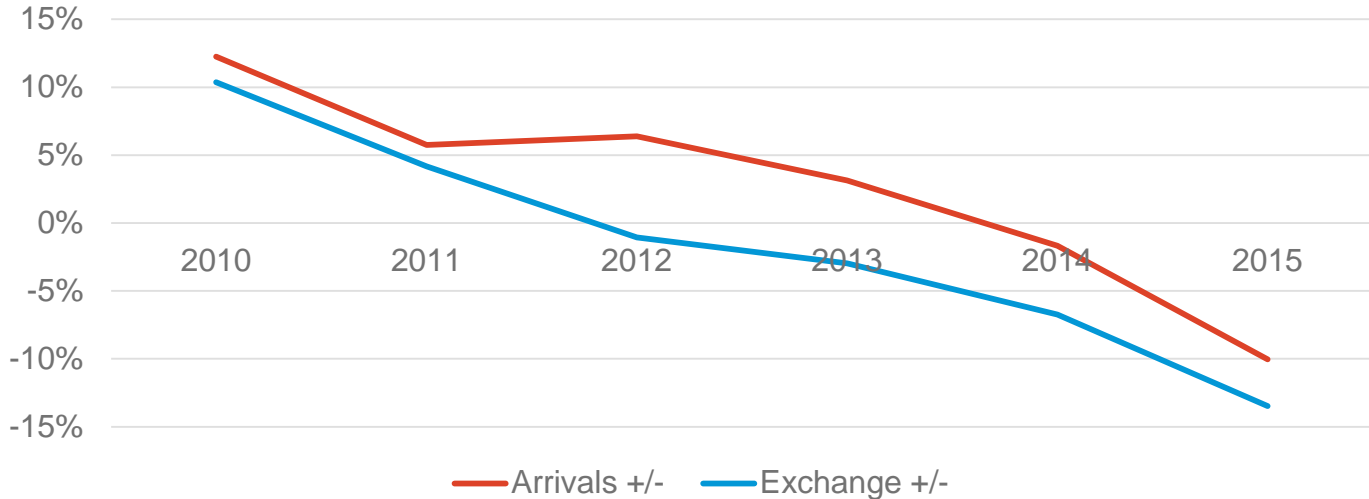


Key Currencies Against the U.S. Dollar



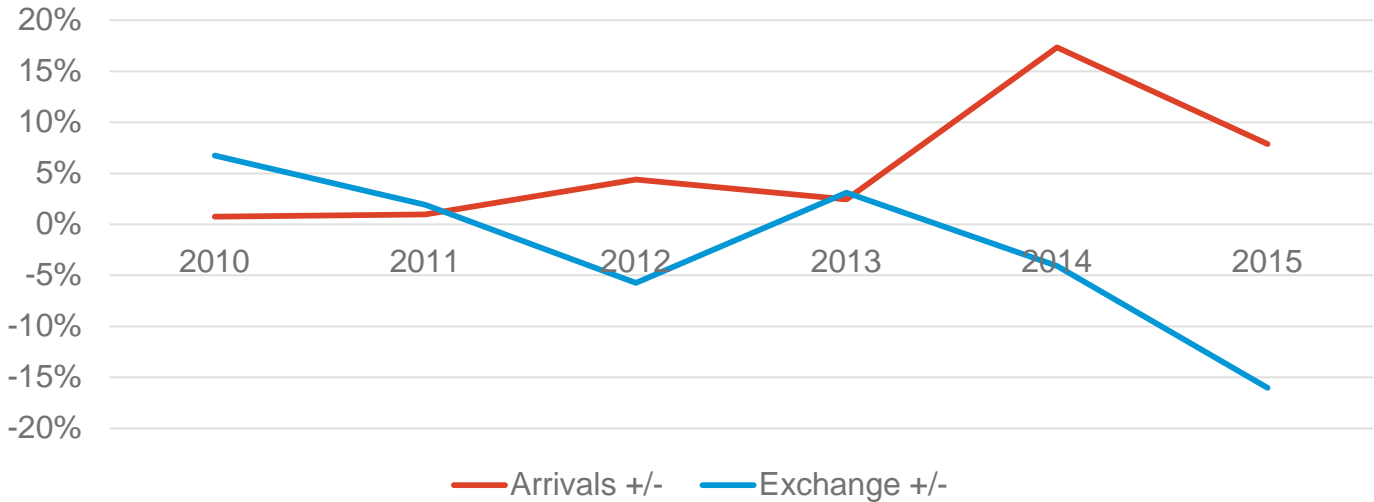
Canadian Change in Arrivals & Exchange

Strong Correlation = 0.96



Mexican Change in Arrivals & Exchange

No correlation = -0.5



An aerial photograph of a city at sunset. The sun is low on the horizon, casting a warm orange and yellow glow over the sky and the water. In the foreground, a large, modern tower with a blue-tinted, conical top is the central focus. Several people in orange safety gear are visible on a circular platform around the base of the tower. The city below is illuminated with lights, and a large body of water is visible in the background.

GOING GLOBAL

How Travelers Make Destination Decisions

miles
marketing destinations



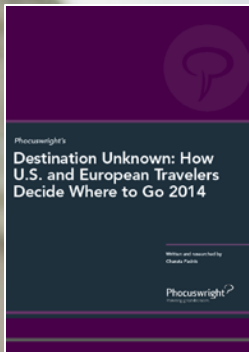
SOURCES OF INFORMATION INFLUENCING DESTINATION SELECTION

MORE INFORMATION: WWW.PHOCUSWRIGHT.COM & WWW.THEBRANDUSA.COM

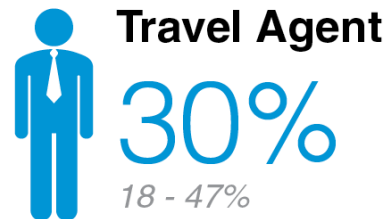
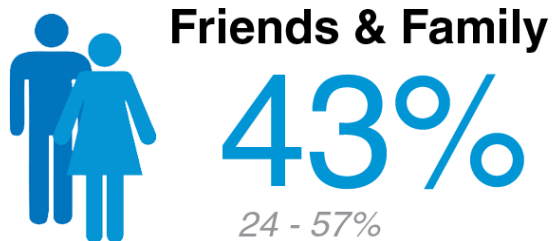
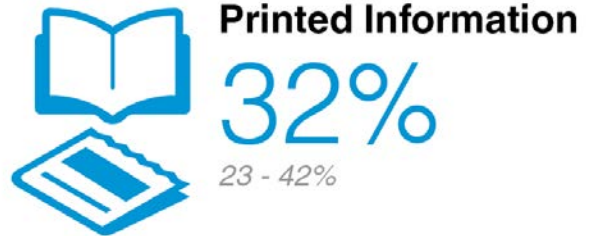
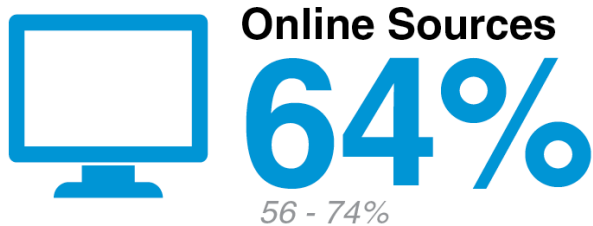


6 DRIVERS OF WHERE TO GO:

1. Personal Desire to Visit a Destination
2. Past Experience
3. Climate
4. Cultural Attractions
5. Accommodation Options
6. Available Activities

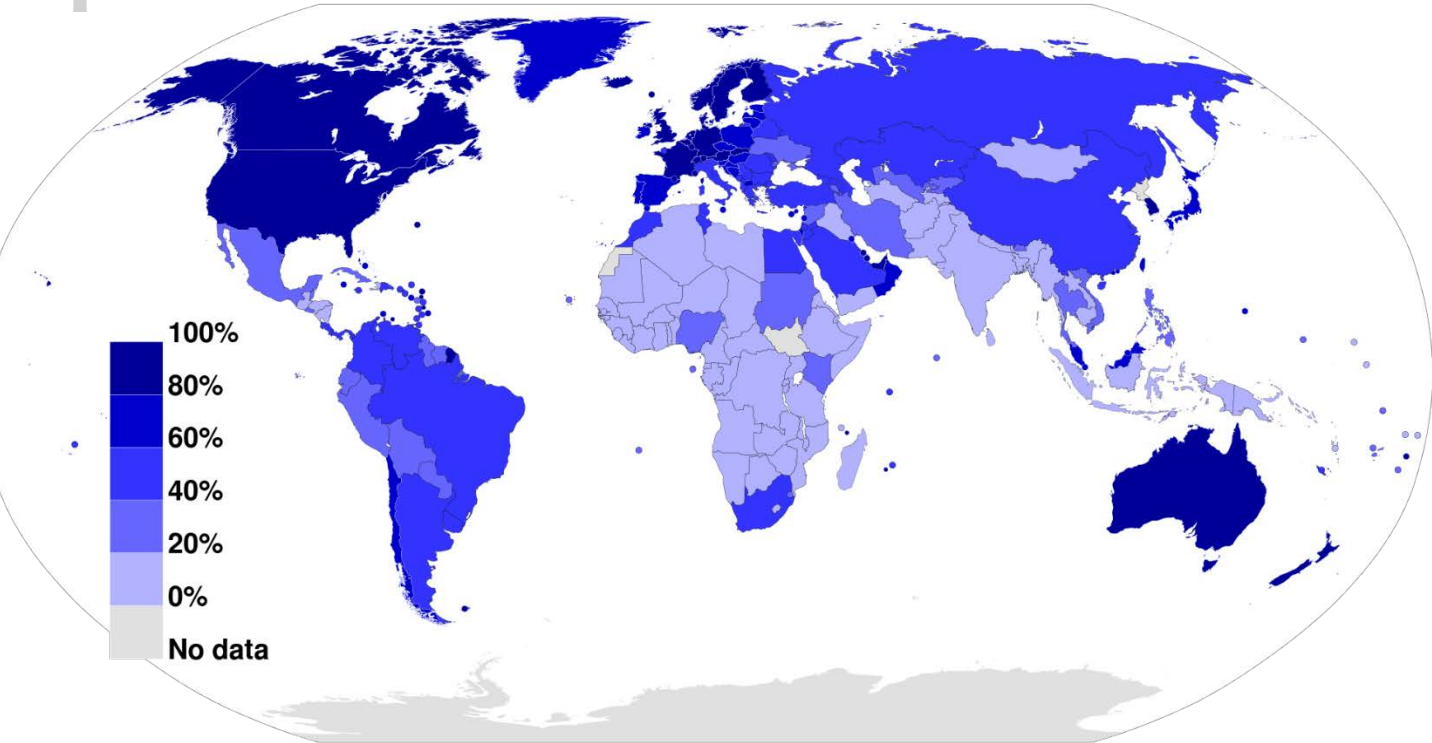


Sources of Information Influencing Destination Selection



Source: Average & range for top 12 source markets – Brand USA Custom Research (PhocusWright)

3.2 Billion Internet Users



Source: As of Third Quarter 2015. Internet Penetration % by Country.



6,146



nbcnews

3h

What a difference 8 years makes. St. Peter's Square in 2005 vs. 2013. #NBCPope



jwage

41m

I like the lady with the "I'm being watched" feeling back in 2005. I wonder if she's feeling that now.



intertagasm3

43m

@kewitwhip @lalledawn hahaha thanks. It caught my eyes. Couldn't concentrate on anything else. Hahaha



frankskyj

41m

Sod



heyitslainey

39m

@eswank



ihartrein

34m

Uh the gadgets



jeanschroeder

35m

@emilylarose



emilylarose

21m

So true @jeanschroeder



jeroherrera

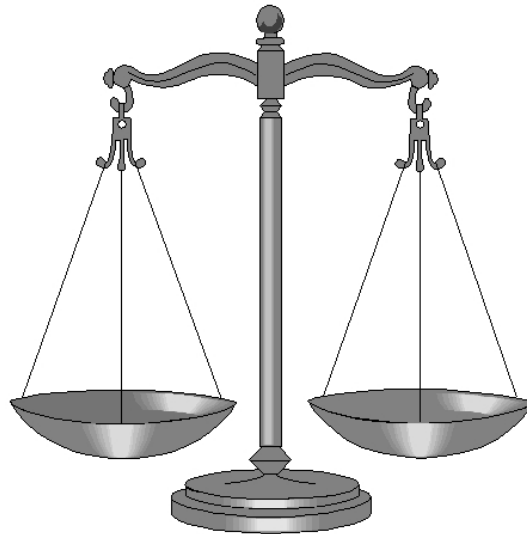
30m

Count me. Took in all around me

To add a comment, please sign in.

BALANCE

1. **Balance** Between Trade & Direct to Consumer
2. **Balance** Between Established & Emerging Markets
3. **Balance** Between Paid and Organic Traffic



INTEGRATED MARKETING CAMPAIGNS

TRADE

**Trade Education
& Support
Programs**

**Trade Famils
& Shows**

**Consumer
Advertising &
Marketing
Campaigns**



**Social Media &
PR Activities**

CONSUMER

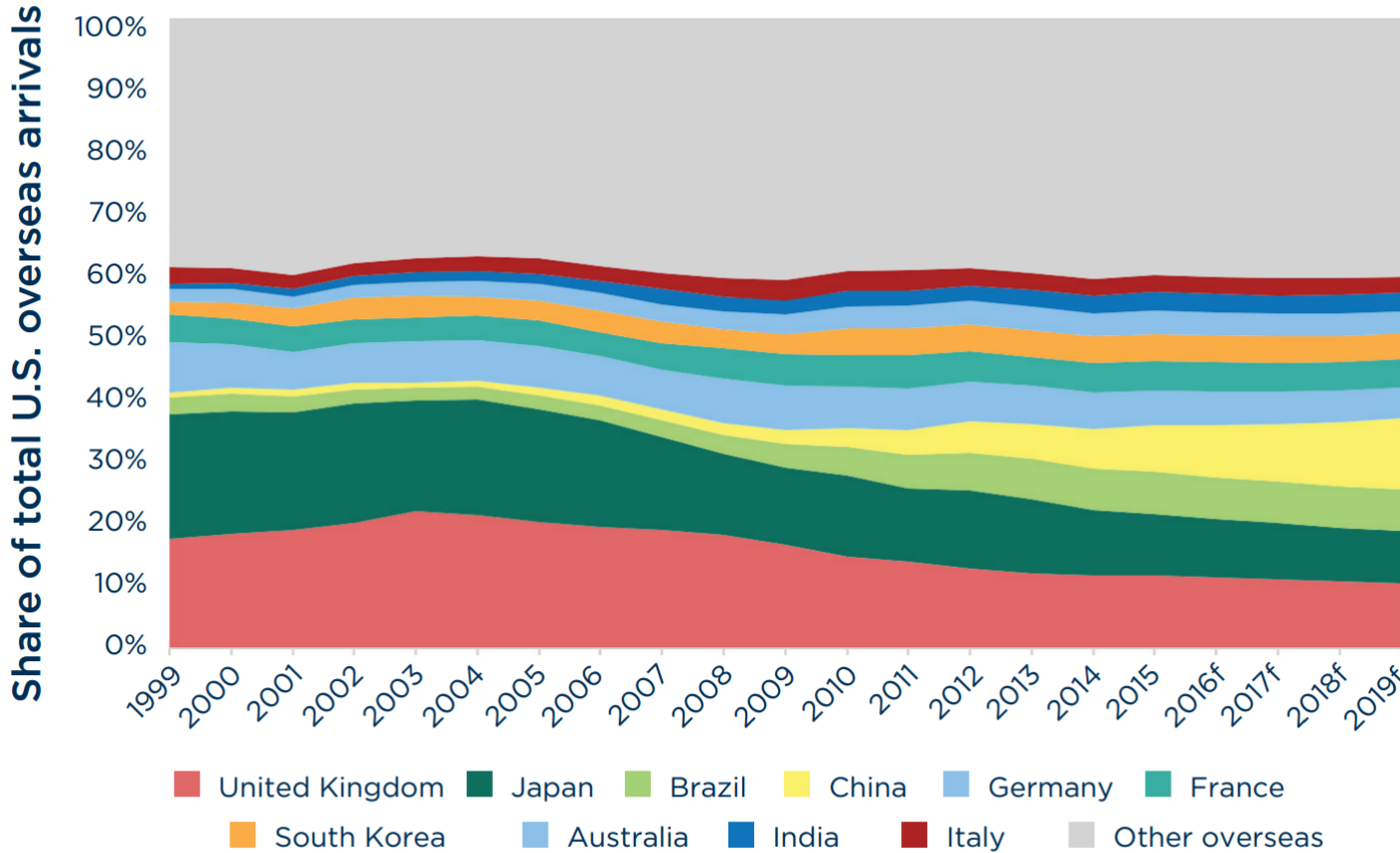
**Content
Development
Programs**

**Visiting Media
Programs**



Which International Market?

Share of U.S. Arrivals Top 10 Overseas Markets



Source: U.S. Department of Commerce

Size, Growth & Prospects - Which International Visitor Markets Offer the Most Potential?

Air Routes, Capacity & Competition Including Easy U.S. Connections to Your Destination

Which International Visitor Markets Best Suit You, Your Destination, Lodging, Experiences?

Readiness of Your Organization and/or Partners to Market To and Service the Market

Leverage Brand USA, Dept. of Commerce and Trade Market Partners. Which Markets offer Support?

Relative Cost of Consumer and Trade Promotion in the Market

International Marketing Partnerships – Opportunity to Work with Others

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Priority Markets for Direct to Consumer

Established

- UK: BA direct flight
- Japan: United direct flight
- Mexico: Volaris, United direct flights
- Germany: Lufthansa's second non-stop

Emerging

- Australia/NZ
 - Significant West Coast & Texas Flight Growth
 - High spend and high percentage of FIT
- China – More than 100 million travelers

COLORADO HISTORIC HOT SPRINGS LOOP



Glenwood Hot Springs, Glenwood Springs



Thermal hot springs flow abundantly throughout the Colorado Rocky Mountains. Soaking in natural mineral water is a time-honored tradition to enhance wellness. One thing is for sure: relaxation is the ultimate goal.



コロラド州の
 無料のビジター・ガイド
 を注文しましょう





UPDATE FROM THE NATIONAL FRONT

Brand USA's Evolving Strategy

Evolving Brand USA Strategy

From Single-Dimension



Great Outdoors

- Cost/Value
- Not worth the trek
- Nothing new

To Multi-Dimensional



Great Outdoors

+



Urban Escapes

- Many experiences in one vacation = Great Value
- Interconnected and accessible possibilities
- Time is the new currency

Evolving Brand USA Strategy

The perceived cost of one trip with multiple experiences holds more value than many trips with a singular focus.

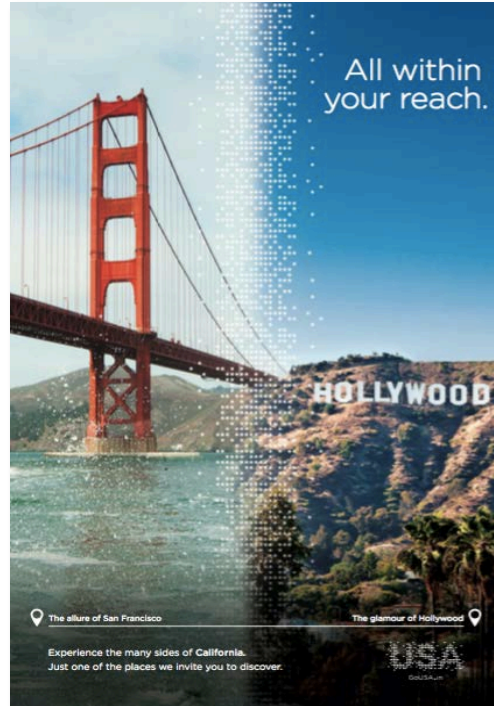
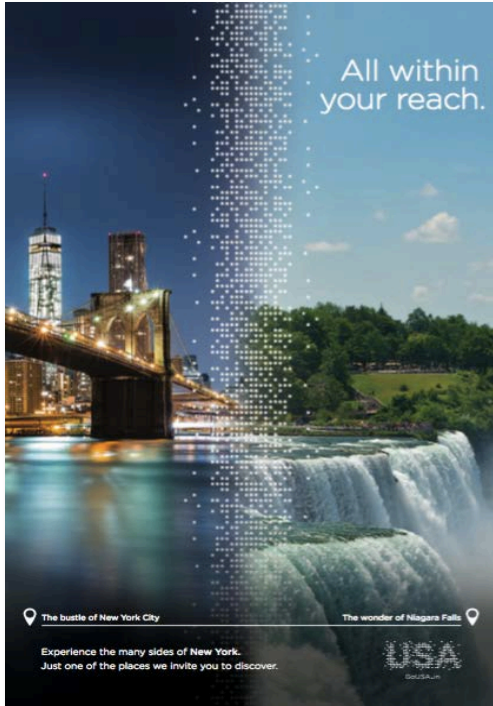


Evolving Brand USA Strategy



Proximity Is The Heart Of Our Value Proposition

Evolving Brand USA Strategy



Across all markets, the campaign features 53 unique pairings



Denver, Colorado

So much here, all within your reach



Colorado

3 Colorado Resorts For All Levels Of Skiers And Snowboarders



An All-Seasons Guide To Visit Colorado



Natural Beauty and Urban Appeal in Boulder, Colorado



Santa Fe, New Mexico



The Craft Beer Trail



COLORADO TOURISM INDUSTRY + BRAND USA

2015-2016 Recap

Programs

- Inspiration Guide
- Digital Content Marketing & Video
- Country-specific Multi-Channel Programs
- Culinary & Outdoors

Markets

- Mexico, Japan, Australia, UK, Germany
- Global (VisitTheUSA.com & Inspiration Guide)

Partners

- 12 partners to date (Fiscal '15/'16)
- Ski, DMO, attractions tours
- From \$4K-\$160K investments



Photos clockwise from above: Lake Tahoe, Nevada; Boise, Idaho; elk at Rocky Mountain National Park, Colorado

In northern **Montana**, explore some of the USA's most breath-taking vistas: Glacier National Park's snow-capped peaks, pristine lakes and alpine meadows carpeted with wildflowers. Visit a living history farm and see a huge collection of dinosaur fossils at the Museum of the Rockies in Bozeman.

For world-class fly-fishing, head to **Idaho's** Silver Creek and the South Fork of the Snake River. Tackle rapids on a thrilling white-water rafting trip. At Sun Valley ski in winter and go hiking and mountain biking in summer.

Wyoming is home to Yellowstone National Park, with its alpine rivers, lush forests, hot springs and gushing geysers including Old Faithful, the most famous. Set in the rugged Grand Teton, the Jackson Hole Mountain Resort has more than 100 trails that lead from a summit of 10,500 feet.

Visitors to **Nevada** can hike among the dramatic sandstone waves in Valley of Fire State Park in Overton. After a late night indulging in the fabulous nightlife of the Las Vegas Strip, unwind the next day while sport fishing on Lake Mead. Ski, bike, boat and hike at magnificent

Lake Tahoe, which is shared between Nevada and California.

Nature lovers will have an abundance to choose from in **Utah** – five national parks with surreal scenery are sprinkled across the state's southern reaches. Hike through narrow slot canyons, watch the sunset framed by a delicate rock arch and see more stars than you can imagine.

In **Colorado**, sample craft beer, peruse Western art and shop for cowboy boots in Denver – nicknamed the Mile High City – then head to Rocky Mountain National Park for views of elk, moose and bighorn sheep grazing in vast meadows. In springtime, fields of wildflowers add splashes of brilliant colour. In winter, ski and snowboard throughout the state at world-renowned resorts including Aspen, Vail and Breckenridge.

CLIMATE AND SEASONS

Expect lots of powdery snow, bright blue skies and cold temperatures in winter. Summers are pleasant and sunny (the southern parts of the region get quite warm). Temperatures can fluctuate dramatically in spring and autumn. •



Learn more about the region's history, food and culture at VisitTheUSA.com/west

COLORADO

High Mountain ADVENTURES

Enjoy scenic vistas and amazing wildlife.

Marvel at the impressive Rocky Mountains and the state's four majestic national parks, including Mesa Verde and the Puebloan Indians' ancient cliff dwellings. Ride back in time on one of Colorado's eight historic railway lines. Taste craft beers and wines and explore a flourishing farm-fresh culinary scene. Listen to live music at Red Rocks Amphitheatre. Experience epic skiing, snowboarding, tubing and dog-sledding in winter. After the snow melts, hike through fields of wildflowers, play golf in the shadow of mountain peaks, ride on horseback, go fly-fishing and look for moose, bald eagles and mountain goats. ■



ASPEN SNOWMASS

Aspen Snowmass is a place where locals and visitors alike come together to enjoy the outdoors and culture, adventure and glamour. Four ski mountains on one lift ticket offer thrills when you need a rush and scenic groomers when you need to unwind. Off the slopes, the action continues with world-class après ski, dining, arts and events.

aspen-snowmass.com/for-national

DURANGO

Ride a steam train up the 13,000-foot peaks of the San Juan Mountains cloaked in golden aspen trees. Explore history over dinner at the historic Strater Hotel (1887) in charming downtown Durango or on a visit to ancient Native American sites in Mesa Verde National Park. Bike or hike a challenging trail and fish or float down one of the nearby rivers.

durango.org



Durango and Silverton Narrow Gauge Railroad; mountain goats



ASPEN SNOWMASS TOURISM

Although it's best known as a world-class winter sports destination, Colorado's Aspen Snowmass offers year-round fun. In spring, hike through valleys carpeted with multicoloured wildflowers, from goldenrod and Colorado blue columbine to silvery lupine and rosy Indian paintbrush. In summer, cultural events including music, art, theatre and dance fill the calendar. Scenic hiking, river rafting, horseback riding and fly-fishing are popular summer activities. In autumn, the Snowmass Balloon Festival fills the sky with vivid colours.

visitaspensnowmass.com

Aspen Snowmass



German Inspiration Guide Trade Study

Satisfaction with Guide

(% of respondents)



Guide is "Helpful/Very Helpful" for:

(% of respondents)

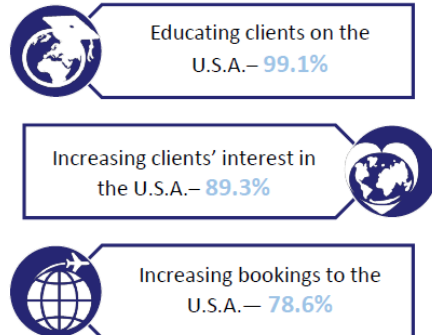
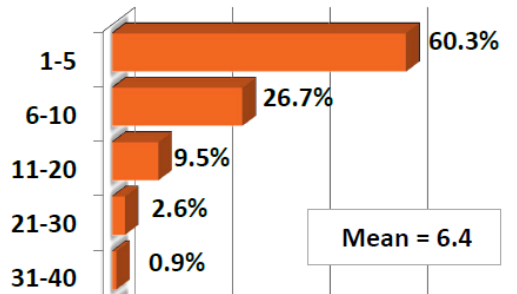


Chart 14: Number of Websites Visited After Reading the Guide



German Inspiration Guide Trade Study

- Increased bookings to the U.S. 78.6%
- Improved perceptions of the U.S. 8
- Influenced to visit a new destination 7
- Influenced to visit a lesser-known destination 49%
- Lengthened their trip 25%



COLORADO: FARM-TO-TABLE AND SEED-TO-SIP

Colorado is a food-and-drink lovers' paradise, bursting with hands-on food tours, farm-fresh dishes and extensive craft beverage offerings. The diversity of Colorado's landscape, from mountains to wide-open ranch lands, is evidenced in the breadth of local food and drink. And the state's heritage, steeped in Native American and Old West traditions, comes through in its rich dining experiences. It's no wonder Colorado attracts visitors from around the globe to world-renowned festivals such as Aspen's Food & Wine Classic, the Great American Beer Festival, the Telluride Wine Festival and the Colorado Brewers' Festival.

FARM-TO-TABLE DENVER

Denver's pedestrian-friendly neighborhoods, brilliant blue skies and stunning mountain views make it a perfect backdrop for culinary explorations. Take a walking tour of the city's many breweries along the Denver Beer Trail before diving into the bustling restaurant scene. The Mile High City boasts award-winners including historic Larimer Square's Ricja, which features Mediterranean dishes presented with a local flair. Or head straight from the airport to Denver Union Station via rail and be rewarded with a visit to Mercantile Dining & Provision. Pick up spices, charcuterie and other seasonal goods at the market or savour a meal at the seasonally focused restaurant. Tell your friends back home you dined at Ophelia's Electric Soapbox (a former brothel) or Linger (previously a mortuary). You'll get a good story and an unforgettable farm-to-table meal.

GRAND JUNCTION'S BOUNTY

For an immersive experience, head to Grand Junction, Colorado's Wine Country and fruit-growing hub since the late 1800s. Artisans use that bounty to produce wine, beer, spirits, cider and more, and local chefs incorporate ingredients from the harvest into menus. Visit lush farms such as High Country Orchards, Talbott's Farm or Alida's Fruits for peaches, pears, cherries and more. Many offer freshly made items such as jams, jellies, salsas and baked goods. Stroll along vineyards and settle in for a wine tasting at gorgeous Grande River Vineyards and Plum Creek Winery in Palisade. Love the heady scent of lavender? Check out Sage Creations in Palisade. (Be sure to try lavender wine at one of the local wineries.) In summer and early autumn, explore the Downtown Farmers' Market for the day's freshest produce and prepared goods.



Clockwise from left:
lavender field, Grand
Junction; Mercantile
Dining & Provision,
Denver; Social Cocktail
Bar, Fort Collins; wine
dinner, Grand Junction;
Linger, Denver



CRAFT BEVERAGE MECCA

Colorado is also at the forefront of the nation's craft-beverage explosion. Brewers, winemakers, distillers and cocktail artisans have made the state a must-stop for fans of lovingly produced drinks. Start in the Front Range, the state's most-populated area, where Denver is home to the Great American Beer Festival in October and Boulder hosts the annual Craft Beer Festival in August. Tour and taste at Boulder's dozens of breweries including J Wells Brewery, Boulder Beer and Santos Brewing Co. About an hour north in Fort Collins, sample wines at Hunters Moon Meadery. Or head to Denver's award-winning Williams & Graham cocktail bar. Hidden behind a 'bookstore', this popular bar creates classic cocktails with locally sourced ingredients.



Learn more about Colorado
at Colorado.com

Multi-Channel Consumer Programs



Haga el pedido de su Guía de Vacaciones de Colorado GRATUITA.



Ve emocionantes videos de Denver gratis



コロラド州の無料のビジター・ガイドを注文しましょう





5 Razones por qué Practicar el Esquí y el Snowboard en Colorado

Hay tantas razones por las que Colorado es el destino de esquí número uno de los Estados Unidos.

Nuestra temporada de esquí es más larga.

Los complejos de Colorado abren antes y las cierran después que en ningún otro sitio en los Estados Unidos.

Tenemos complejos inmensos.

Va a es por mucho el área de esquí más grande de todo el estado; Keystone cubre tres montañas y Snowmass disfruta de más de 300 pulgadas de nieve cada año.

Atesoramos los lugares ocultos.

La histórica Howelsen Hill Ski Area ofrece saltos de esquí de nivel olímpico, mientras que Ski Granby Ranch es ideal para las aventuras de esquí familiar.

Los resorts de Colorado tienen las pistas a mayor altitud de los Estados Unidos.

Esto significa una nieve increíble, vistas espectaculares, pistas más largas y mayores descensos.

Hay diversión para toda la familia.

Steamboat Springs ofrece paseos en trineos tirados por caballos. En Beaver Creek Resort puedes patinar en hielo, en un estanque congelado, en el corazón de una elegante aldea de esquí.



colorado.com/espanol



CUÁN SUBLIME ES SER PEQUEÑO

Nos pasamos la vida entera intentando ser grandes. Queriendo ser importantes. Y luego un día nos enfrentamos cara a cara con la inmensidad de la naturaleza. Nos quedamos maravillados ante las montañas que se elevan desde el suelo cubierto de nieve radiante. Y saboreamos el silencio en el sosiego. Nos damos cuenta de lo pequeños que, en realidad, somos, y lo verdaderamente maravilloso que es eso.

Obtén la guía America's Best Skiing® en Colorado.com



USA Discover America .mx

What's Next

Evolving Programs

- VisitTheUSA.com re-launch in September
- Expanded activation partnerships with Expedia
- New program with Televisa in Mexico
- Expanded video marketing strategies

Next Steps

- IPW Planning meeting
- 2016/2017 Colorado Industry Program Launch

miles



miles



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INTERNATIONAL MARKETING TOOL KIT: BUDURL.COM/DMAWESTGOINGGLOBAL



Global Smart

Best Practices for Your International Visitor Marketing Programs

Sponsored by Miles

International Market Selection


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#1 Canada #2 Mexico #3 United Kingdom



2016 BRAND USA ORIGINALS
VIDEO CREATION & DISTRIBUTION



Destination Analysts

The State of International Travel: A Peek into 2016

Periscope Broadcast Series

February 2016

content that

vels

Content Marketing Best Practices

Overview

- The 8 Essentials of Successful Content Marketing
- Content Distribution with the Hyper-Informed Traveler
- Top Tips for Content that Travels Well
- The Three Broad Channels of Content Marketing & Distribution

miles marketing destinations



Nate Huff
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Social: @natehuff

Going Global

Thank you

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milespartnership.com