

# SACVB Hill Country FY16 Intl Outreach Reco

November 17, 2015





# Agenda



## Mexico Outreach

- Travel Trends & FY15 Highlights
- FY16 Media Recommendation

## Canada Outreach

- Travel Trends & FY15 Highlights
- FY16 Media Recommendation

## Summary, QA/Next Steps



A large, light brown sunburst graphic with many thin rays emanating from a central point, serving as a background for the title.

# Mexico Outreach



A large, light brown sunburst graphic with many thin rays emanating from a central point, positioned behind the title text.

# Travel Trends & FY15 Highlights





# There is active planning and booking for US Trips from MX

## Top Travel Sites



1. despegar.com



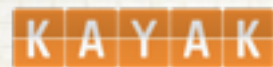
2. hotels.com



3. tripadvisor.com



4. expedia.com



5. kayak.com

## Top Local Travel Provider Sites



1. aeromexico.com



2. volaris.com



3. interjet.com

25% of Mexican travel is long-haul, with the US being the dominant player in this market, claiming 60% of those trips



## Mexican Travelers' Wish Lists

- Cultural & historical attractions
- Urban cultural experiences
- Sampling local flavors
- Shopping





# Tourism from MX to TX is big business with room to grow



7.7 million visitors in 2014, generating \$4.5 billion in direct spending

Travel from Mexico to Texas is forecasted to increase by 32.6% by 2020

Mexico is the 2<sup>nd</sup> largest market for international travel to the US, behind only Canada.

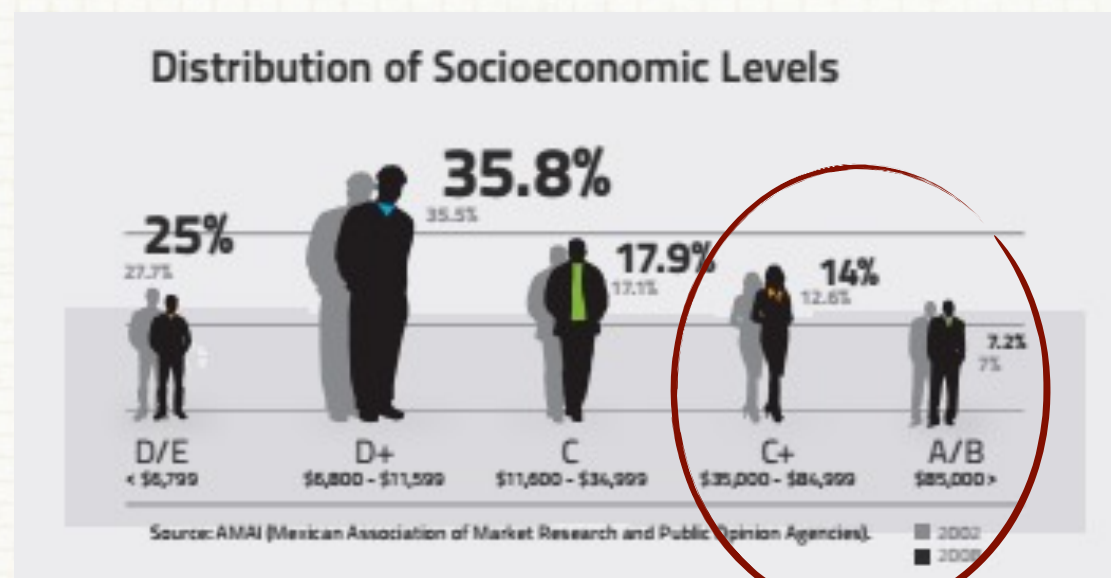
However they are first in Texas





# The affluent traveler in Mexico is a specific segment

1/5 of Mexican nationals have a household income above \$35,000 annually (A/B & C+)



## Online consumers in Mexico

- ✓ Married with children
- ✓ Homeowners
- ✓ Work full time

80% of online consumers have attended a university, and 60% are university graduates





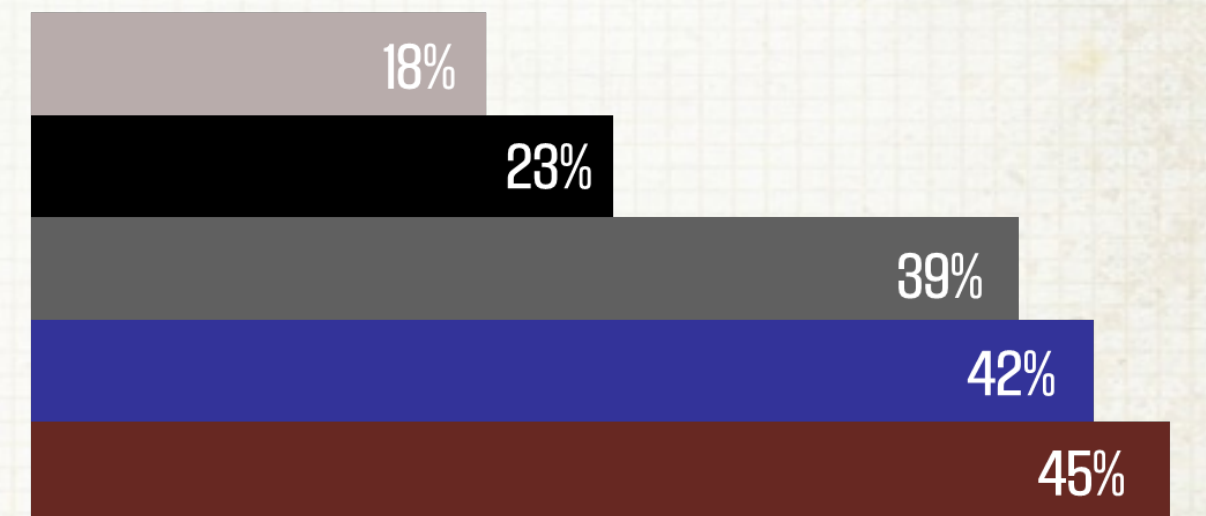
# Print + Internet are the top drivers of awareness & interest



■ Social ■ Internet ■ Airline Mag ■ Travel Package ■ WOM

Word of mouth, travel packages, airline magazines, Internet and social media are the most common reason visitors became interested in San Antonio

Print and online are the most common recalled sources of advertising awareness



■ Social Media ■ Newspaper ■ TV ■ Internet ■ Magazines

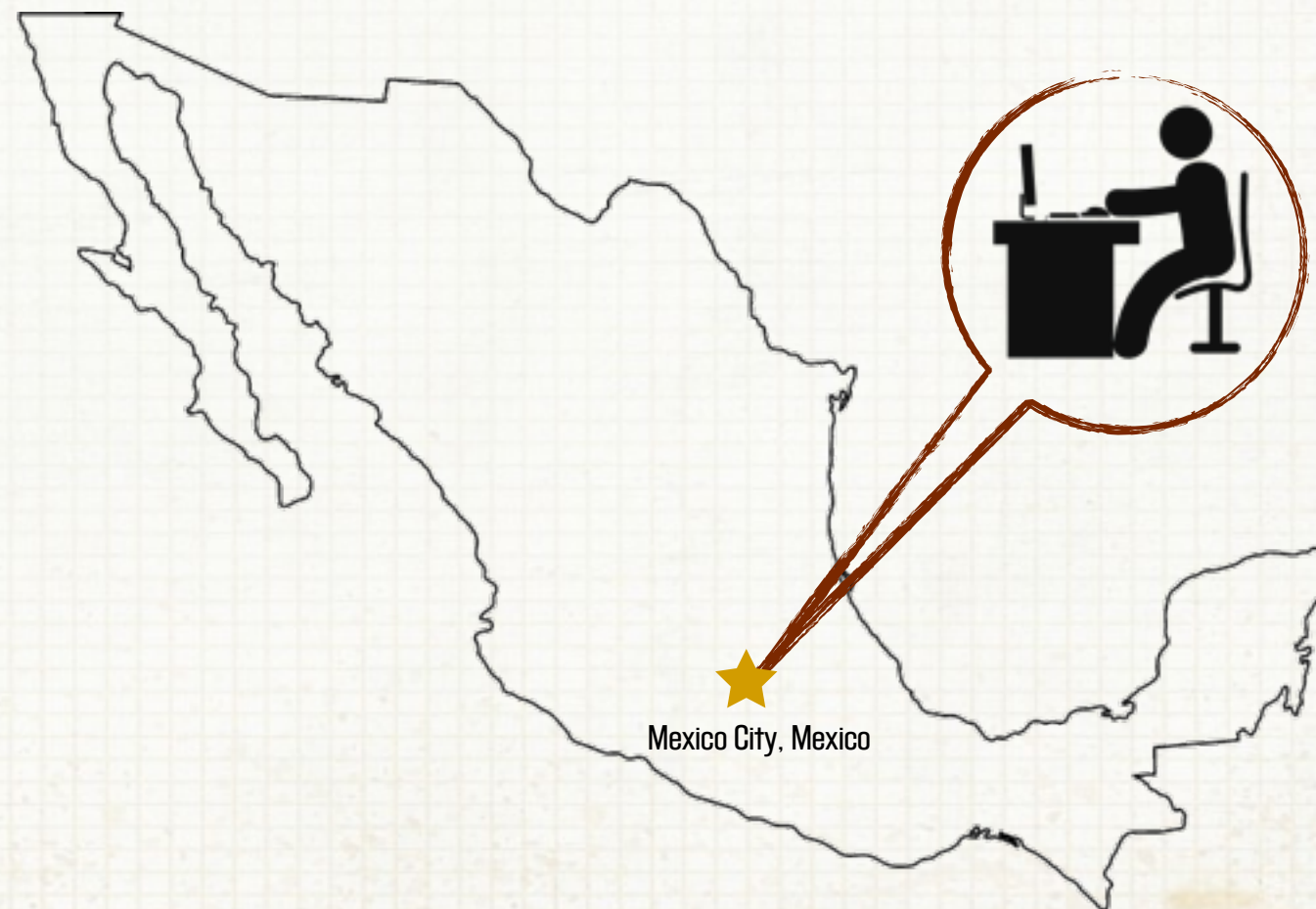




# Digital consumer behavior in Mexico is active and savvy

About 68% of  
the total  
population in  
Mexico will own  
a smartphone in  
2016

Around one half of active online consumers in  
Mexico live in Mexico City







# Social media is mass media in Mexico

Social media sites have 98.2% reach in Mexico



Mexico is the second leading country in Latin America (behind only Brazil) in terms of unique visitors to social networking sites

The social media category (including social networking and blog sites) grew 4.1 % in Mexico last year

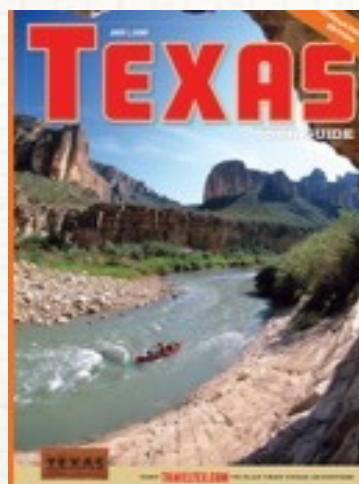
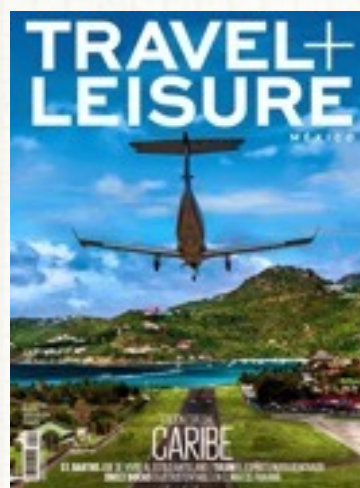






# FY15: Traditional media delivered over 3MM impressions

\$60.3K | 3.4MM Impressions



3.4MM Impressions

15 Insertions\*









# FY15: Hill Country delivers strong CTR of 0.32% with \$0.41 eCPC

Social media and large impact digital units across various partners continue to be top performers

May - September

FY2015 (October 2014 - September 2015)

Site	Impressions	Clicks	CTR	Media Cost	eCPC	eCPM	Impressions	Clicks	CTR	Media Cost	eCPC	eCPM
 Expedia.mx	784,781	1,362	0.17%	\$21,578	\$15.84	\$27.50	1,276,229	2,791	0.22%	\$37,500	\$13.44	\$29.38
 CNN México	90,188	723	0.80%	\$1,236	\$1.71	\$13.70	139,813	1,092	0.78%	\$2,000	\$1.83	\$14.30
 Quién	166,865	3,808	2.28%	\$5,106	\$1.34	\$30.60	254,215	5,653	2.22%	\$8,000	\$1.42	\$31.47
 OPERA MEDIWORKS	2,765,631	9,376	0.34%	\$5,978	\$0.64	\$2.16	4,545,454	28,397	0.62%	\$8,000	\$0.28	\$1.76
 Google	68,585	1,221	1.78%	\$1,501	\$1.23	\$21.88	156,279	2,456	1.57%	\$2,970	\$1.21	\$19.00
 facebook	34,119,283	84,027	0.25%	\$7,850	\$0.09	\$0.23	50,361,849	139,374	0.28%	\$15,998	\$0.11	\$0.32
Hill Country MX Total	37,995,333	100,517	0.26%	\$43,249	\$0.43	\$1.14	56,733,839	179,763	0.32%	\$74,468	\$0.41	\$1.31



# Hill Country: Mobile & Interstitial deliver click volume

## Hill Country - Mobile

2,889,826 Imps | 9,808 Clicks | 0.34% CTR

SANANTONIOTEXASHILLCOUNTRY.COM



## Hill Country - Interstitial

156,766 Imps

4,372 Clicks

2.79% CTR



## Hill Country - standard banners

760,873 Imps | 1,089 Clicks | 0.14% CTR

PROOF | CONFIDENTIAL

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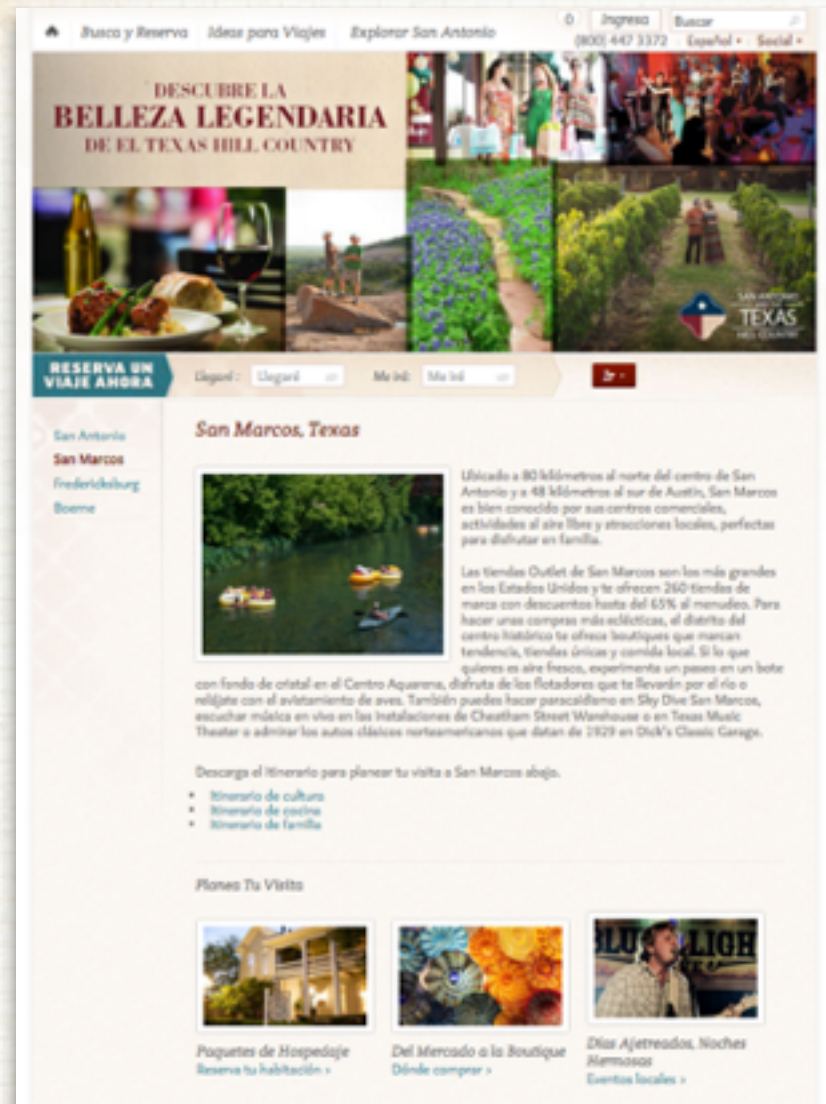
Sizmek 2013 Travel Benchmarks for Mexico RM: 0.06% CTR & 2.45% Interaction Rate,

13

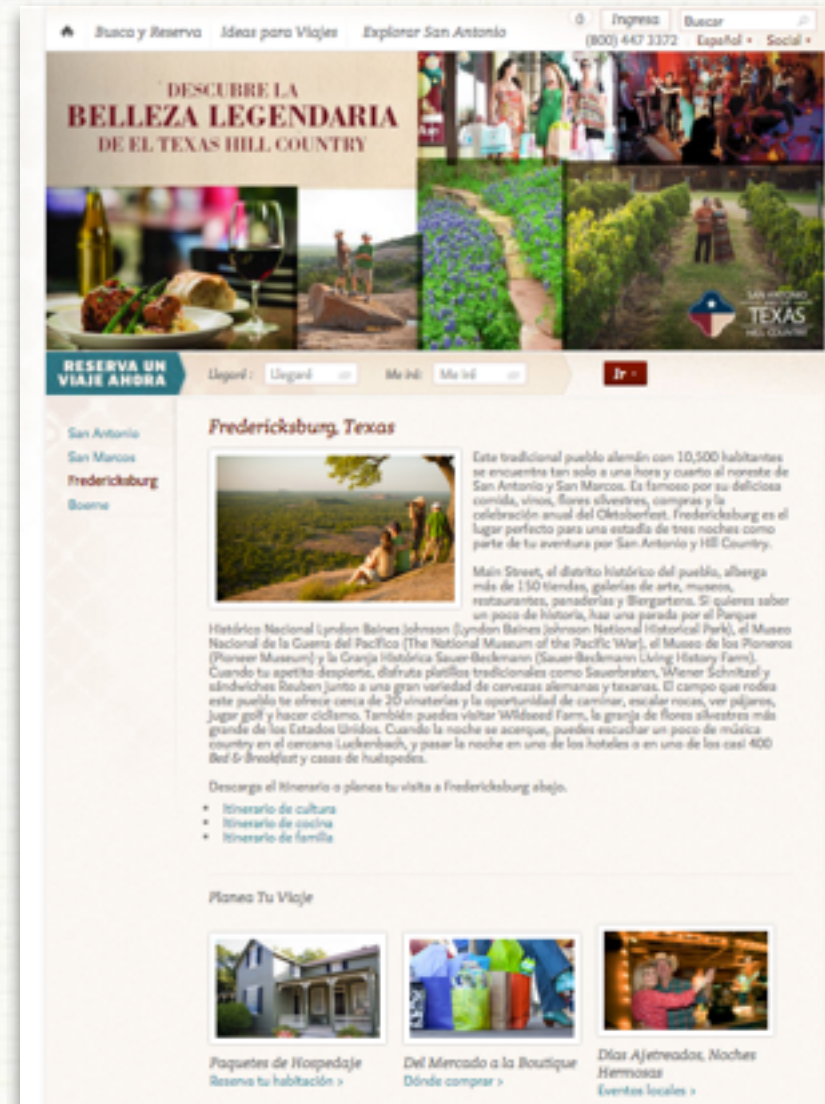
0.08% CTR benchmark for standard banners (Sizmek 2013)



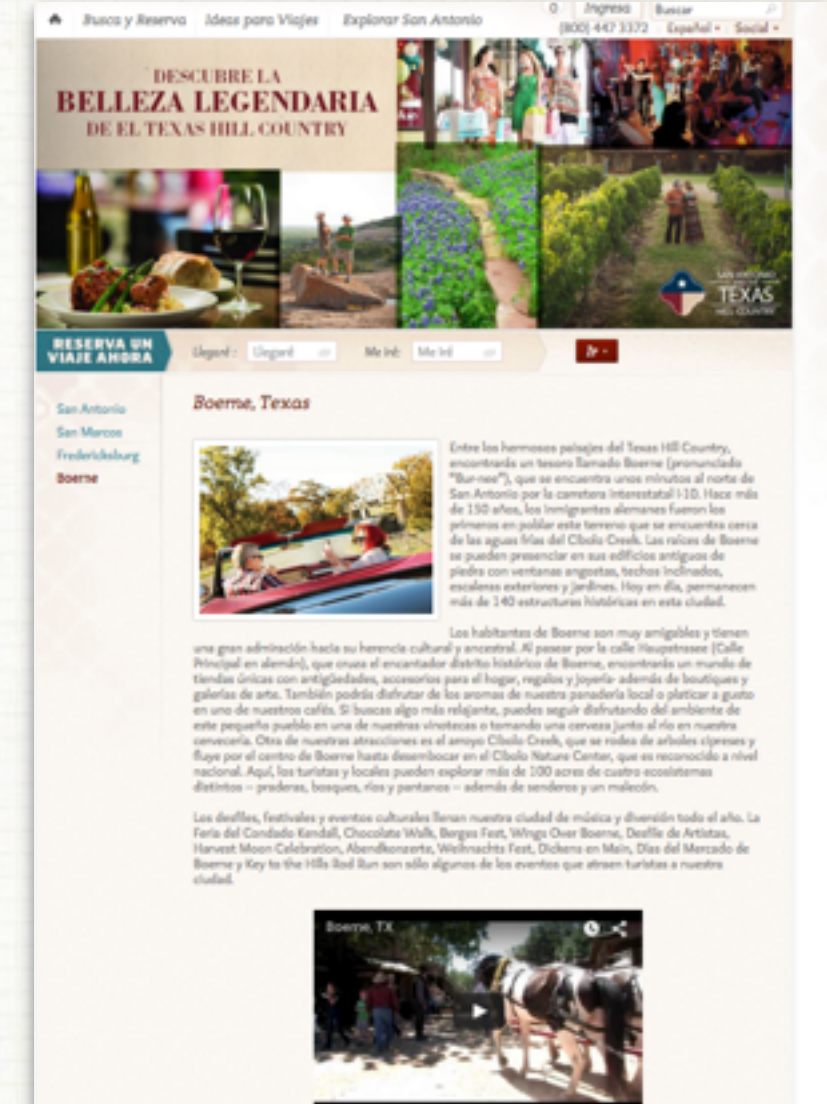
# Hill Country partners see YOY increase on respective landing pages



San Marcos LP - 2,644 Pageviews  
(vs. 1,638 in FY14)  
129 trackable clicks to San Marcos website



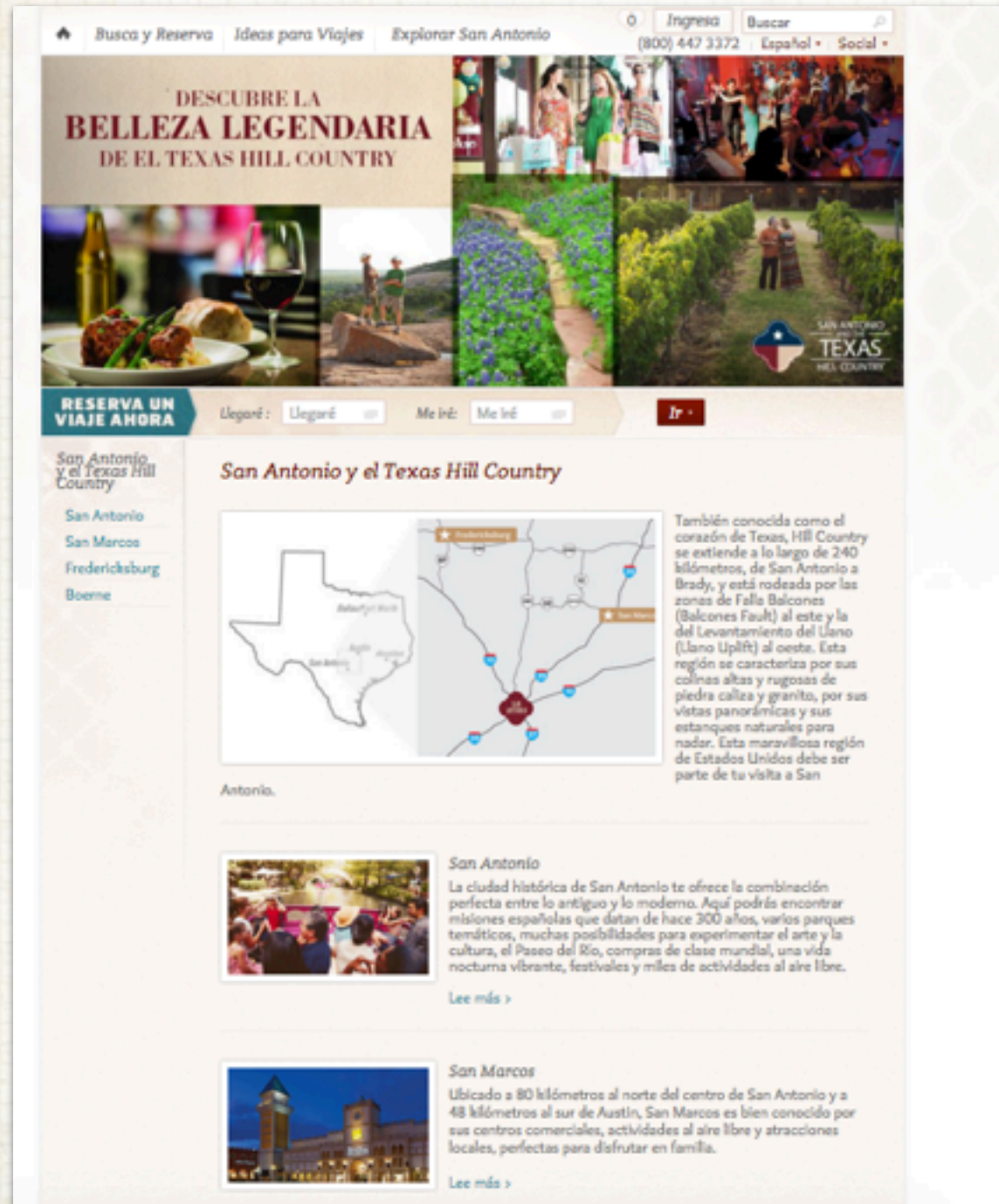
Fredericksburg LP- 2,481 Pageviews  
(vs. 1,524 in FY14)  
68 trackable clicks to Fredericksburg website



Boerne ESP LP - 1,095 Pageviews  
(New in Fy15)  
8 trackable clicks to Boerne website



# Over 111K pageviews to espanol/LP/Texas-Hill-Country



111,619 Pageviews to espanol/LP/Texas-Hill-Country

95,196 Visits

1:59 Visit Duration

48% Mobile Visits | 42% Desktop | 10% Tablet

74% New Visitors

26% Returning visitors

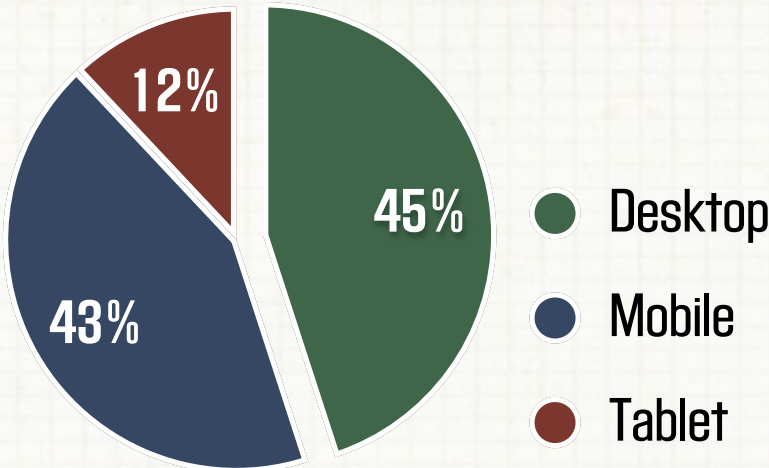


# YOY mobile traffic to Hill Country content pages increased by 2.6X

FY15

259,876 Page Views

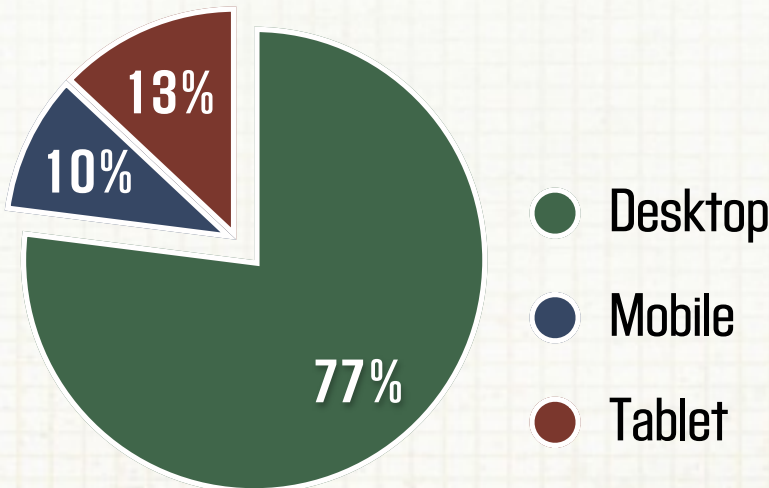
1:13 Visit Duration



FY14

324,738 Page Views

1:23 Visit Duration



Overall traffic decreased 19% YOY as a result of (1) 16% lower Facebook spend in FY15 compared to FY14 due to lower BUSA matching and FY14 including 2 campaign budget years and (2) mobile under-delivery with Opera media.

Facebook is a top performer, and generates a large volume of the campaign page views & Facebook spend fluctuation has a large impact on site traffic.



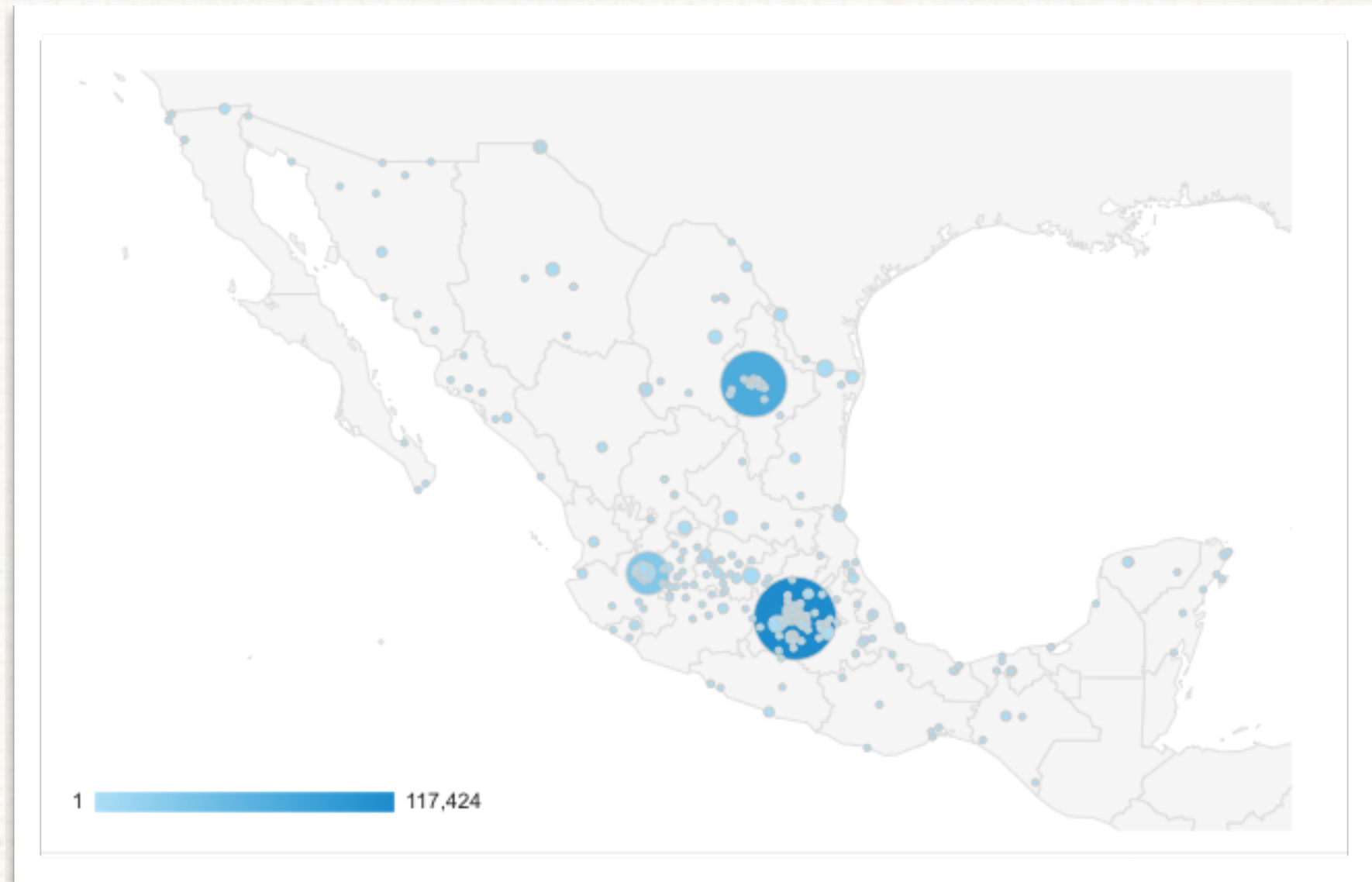


# FY15: 2/3 of MX Traffic from 3 key cities supported by media

Mexico City - 35.5%  
(133,215 visits)

Monterrey - 21.2%  
(79,463 visits)

Guadalajara - 9.7%  
(36,590 visits)







## Key takeaways from travel trends & FY15 highlights

Print and Internet sources in Mexico create awareness and drive interest in US visitation

Facebook remains the top used social networking site in Mexico, providing efficient reach while reaching a targeted affluent audience

Majority of MX population uses mobile devices. Ads on mobile need to stand out to grab attention

Research indicates that Nationals are interested in cultural and historical attractions.  
Plus up San Antonio's culture & arts while also promoting extended trips to the Hill Country.



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# Mexico FY16 Media Recommendation





# FY16 Parameters: Target MX affluent traveler in primary cities

Hill Country Budget: \$97.1K (Remaining portion of budget allocated to Canada)

## Audience

Primary: Travelers, A25-54,  
A&B Socio-Economic Status in Mexico City &  
Guadalajara & ABC+ in Monterrey  
married & single, with & without children



## Timing

Priority 1: Summer 2016

Priority 2: Spring 2016 (Semana Santa)

Priority 3: Winter/Holidays 2015  
(focus on standard IAB sizes for this time period)





# FY16 Goal: Increase website traffic for Hill Country pages







## FY16: Traditional media strategy focuses on print

Utilize magazines that reach a higher income audience with disposable income to travel

Mix of travel endemic, lifestyle, and cultural magazine titles to reach a diverse audience

Leverage BUSA returns to increase frequency and continuity

Plan media activity prior to key travel periods (Semana Santa/Summer)







# FY16: Digital strategy focuses on mobile, social and search

New Partner



Partner Purpose

High impact across devices

Targeted social activations

Travel endemic

Search

Returning Partners







Mexico

## FY16 NEW: Digital partner details



ADTHEORENT™

\$26.5K Total | 4.1MM Impressions | \$6.45 CPM | Custom, 300x250, 728x90 & 320x50

**OPPORTUNITY:** Target residents of Mexico accessing any website in the Adtheorent network, even targeting down to the Mexico zipcode level.

- Real-time learning machine ensures that the most effective targeting data/partner is being used
- “Apptivation” technology allows the rich media creative to interact seamlessly with social apps
- Creative will go above and beyond small banner to create custom immersive mobile rich media.



SAMPLE SITES



EL MUNDO



UNIVISION

batanga

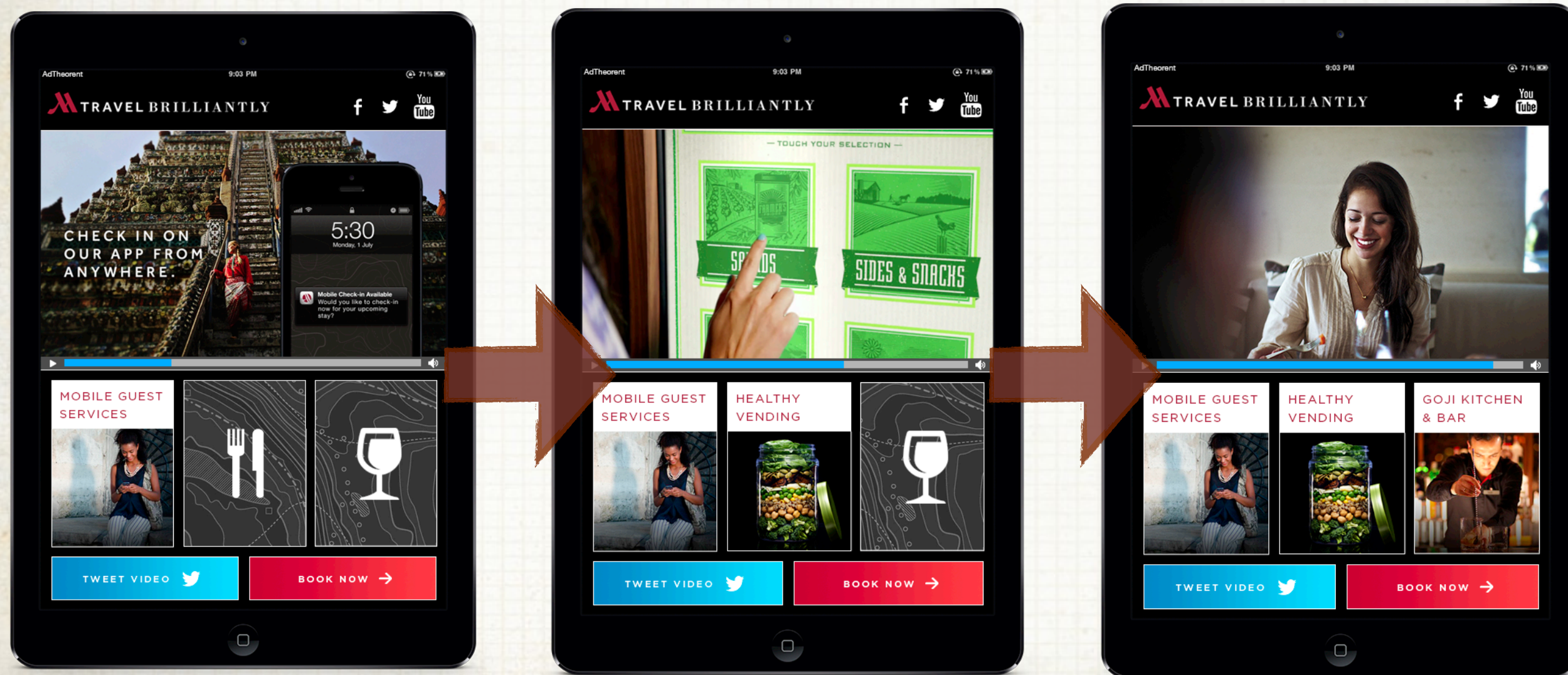
NATIONAL GEOGRAPHIC

Target residents of Mexico accessing any website in the Adtheorent network, even targeting down to the Mexico zipcode level.

San Antonio Convention & Visitors Bureau Uses High Impact Mobile “Selfie” Rich Media to Drive Consumers to Experience the Destination



Wide range of creative capabilities to highlight shopping plus other available opportunities in San Antonio's Hill Country



Integrate the rich media unit directly with features of the phone as well as directly with social apps for natural sharing experience



# FY16 RENEWALS: Print partner details

\$19K | 5MM Impressions | FP4C

\$4.8K | 93K Impressions | FP4C



## Aire - AeroMexico Inflight Magazine

Mexico's #1 in-flight magazine

Distributed in seatbacks, lounges, and ticketing offices

Frequency: Monthly

Circulation: 1,680,000

87% of readers are ABC+

Recommendation: 2 FP4C insertions (1 Bonus)  
Feb, May, Jun



## Travel & Leisure Mexico

Travel endemic publication that provides insights on destinations and travel tips

Frequency: Monthly

Circulation: 55,000

100% of readers are ABC+

Recommendation: 1 FP4C insertions (1 Bonus)  
Mar, Jun



# FY16 RENEWALS: Print partner details continued

\$5.6K | 120K Impressions | FP4C



## Quien

Entertainment publication that gives readers insight into the lifestyles of Mexican high society, celebrities and personalities

Frequency: Bi-Weekly

Circulation: 120,000

72% of readers are ABC+

Recommendation: 1 FP4C insertion in the special Texas advertising section. Paid insertion comes with a bonus FP advertorial

June





# FY16 RENEWALS: Digital partner details



\$20.7K Total | 1.75MM Impressions | \$11.82 CPM | 300x250, 160x600, 740x50, responsive, & search marquee  
Reach travelers in Mexico who have expressed interest in traveling to the US with focus on more affluent audience.



\$9.2K Total | 287.5K Impressions | \$32 CPM | 995x650 takeover & 300x250  
High impact interstitials on Quien continue to garner attention and interest with Quién's more affluent female audience



\$18.8K Total | 187K Clicks | \$0.10-0.15 CPC  
Utilize new carousel ads while continuing to utilize Facebook's strong reach and efficient CPC in Mexico with targeting to education level (to reach more affluent audience).



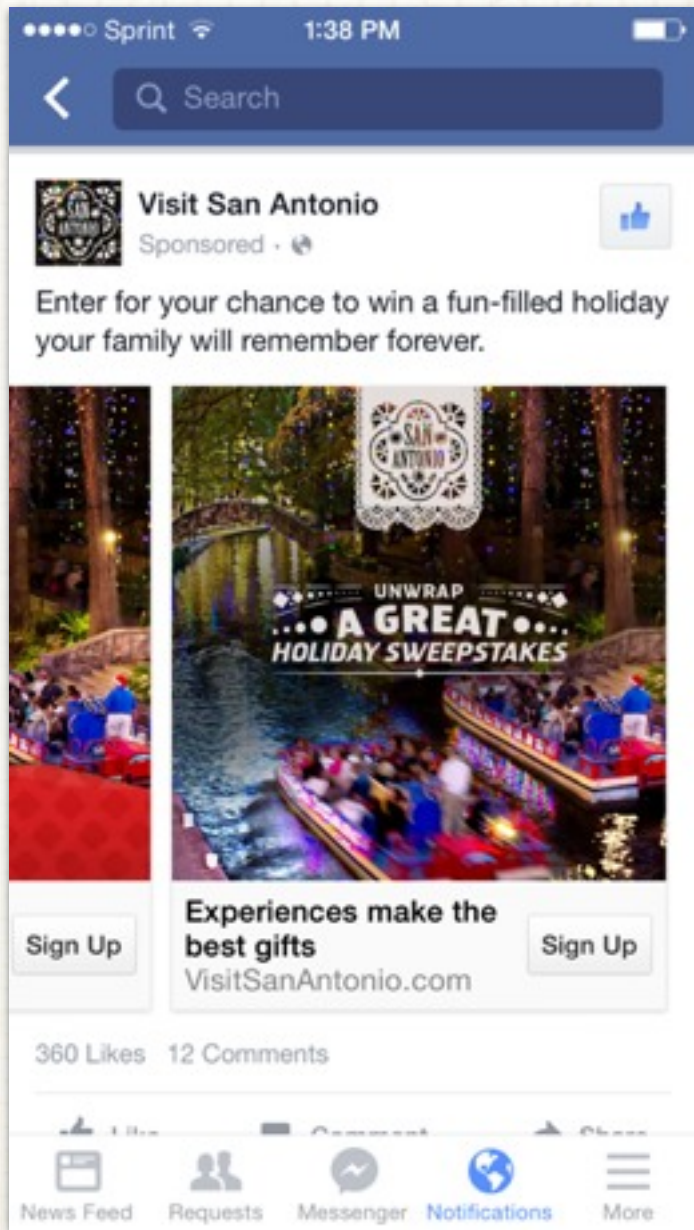
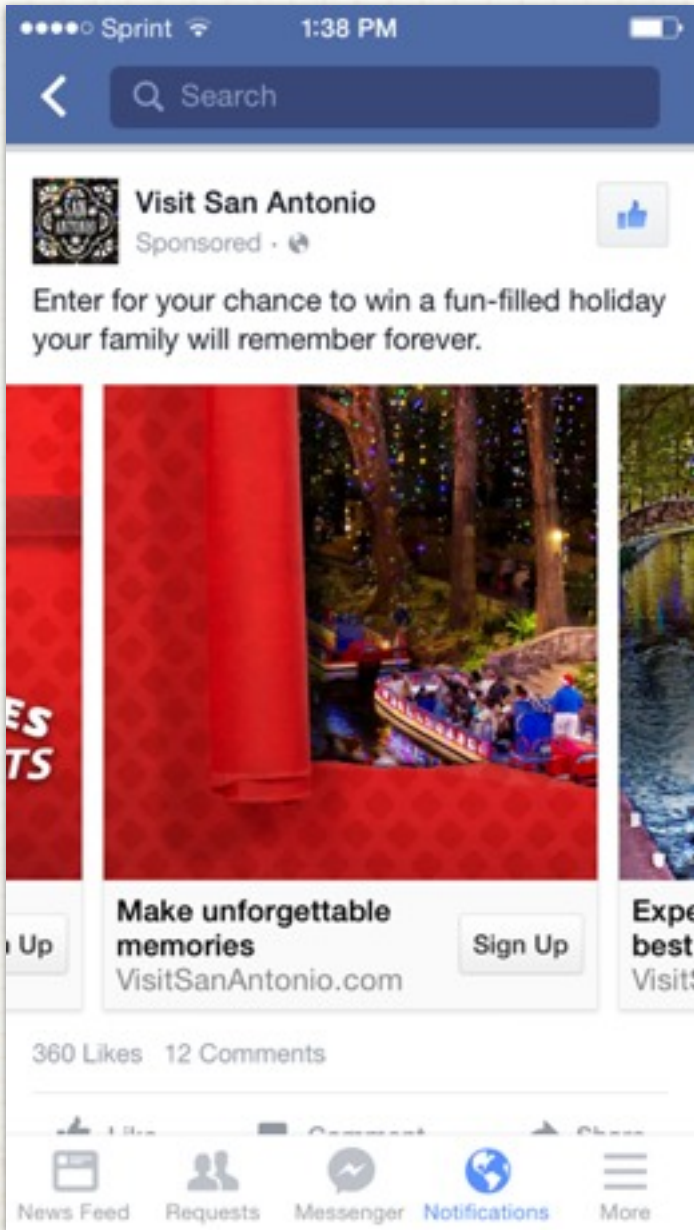
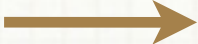
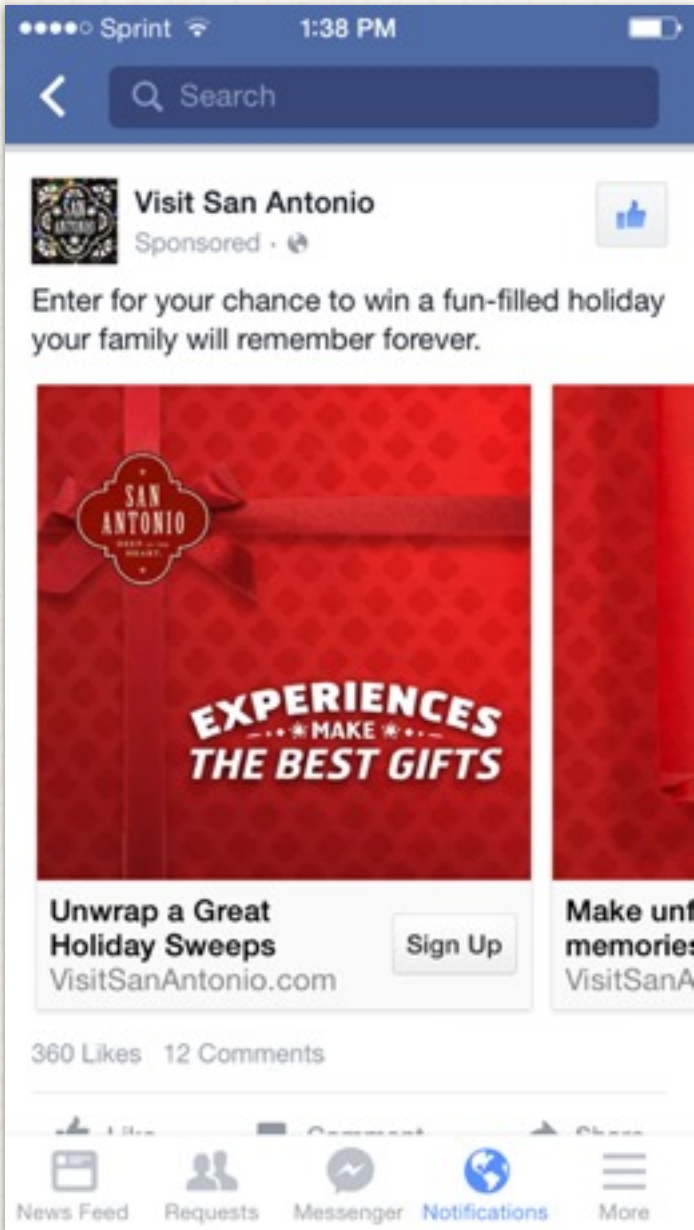
\$4K Total | 3.2K Clicks | \$1.50 CPC  
Drive lower funnel conversions with travelers considering travel to San Antonio and the Hill Country with search ads on Mexico's top search engine





# Facebook Carousel Ad Example

Facebook carousel allows for multiple images to be featured within the same creative unit





# Summary: FY16 Mexico Outreach

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Hill Country MX Total w/ BUSA: \$110.9K

Hill Country Contribution: \$97K

(\$25.6K Traditional | \$71.4K Digital)

BUSA Return: \$13.8K

(\$3.8K Traditional, \$10K Digital)

5.3MM Trad Imps | 45.3MM est Digital Imps

191K purchased clicks



A large, light brown sunburst graphic with many thin rays emanating from a central point, positioned behind the title text.

# Canada Travel Trends & FY15 Highlights





# Visitation to Texas is lower than Mexico but Canadians stay longer



465,000 visitors in 2014, generating \$430 million in direct spending

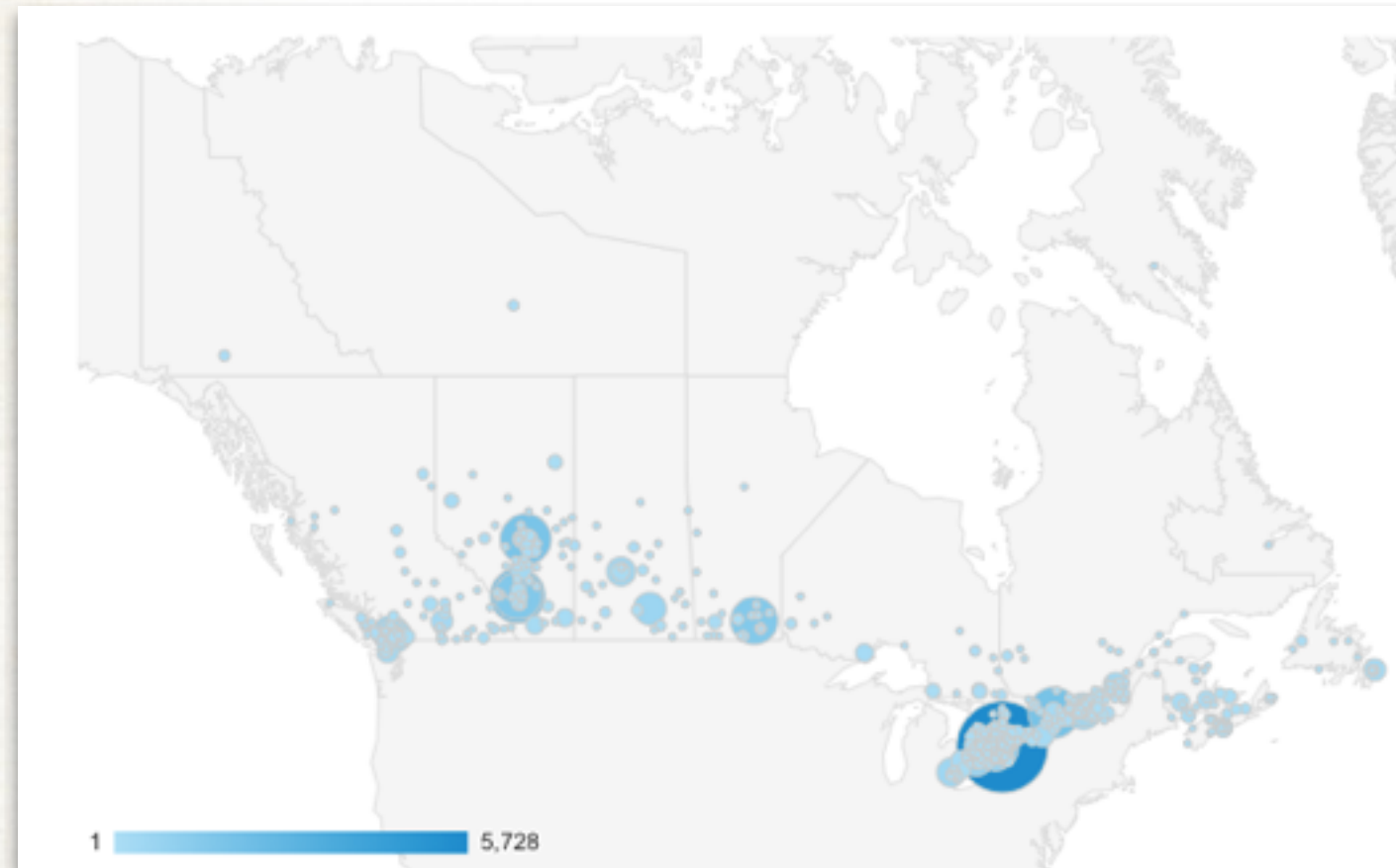
It is easier than ever for Canadian visitors to get to Texas, with two new direct flights in 2015:  
Calgary to Houston & Toronto to Austin

Majority of Canadian visitors to Texas fly versus drive and stay an average of 12 nights\*





# FY15: CA VSA.com visitors spend more time on site than MX



52,512 Total Visits

42,591 Unique Visitors

2,571 page views to Hill Country Content


2:31 Avg Visit  
Duration

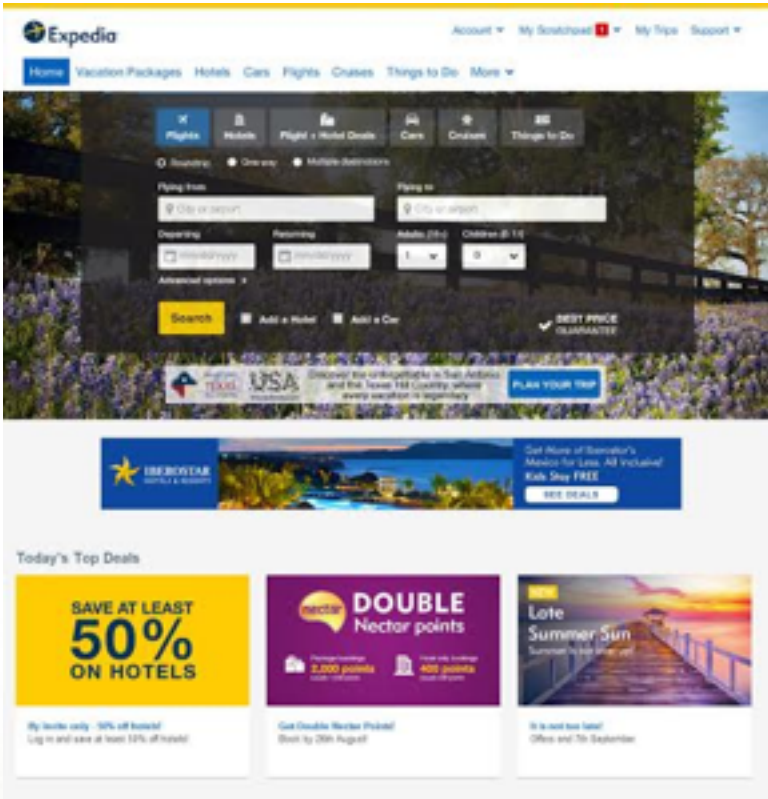
79.6% New Visitors

Together, Toronto and Calgary are 22% of  
Canadian traffic



# Hill Country Canada campaign exceeds North American CTR benchmark

Site	Impressions	Clicks	CTR	Media Cost	eCPC	eCPM	Total Conversions	Browse Book	Trip Ideas	Explore SA
	698,784	758	0.11%	\$18,000	\$24	\$26	58	7	34	17
Hill Country CA Total	698,784	758	0.11%	\$18,000	\$23.75	\$25.76	58	7	34	17

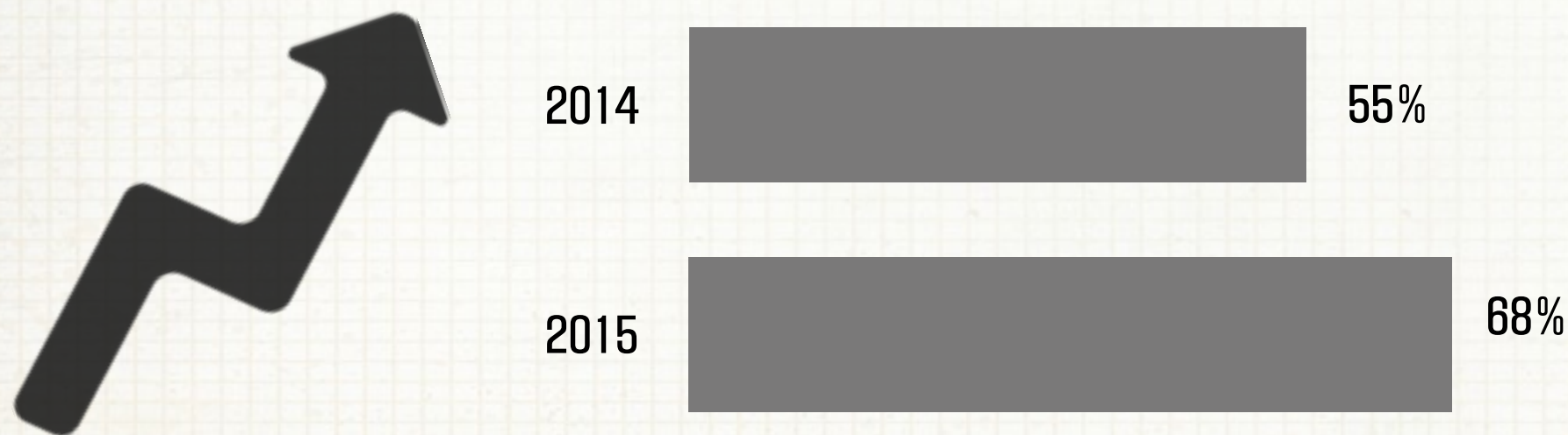






# CA mobile growth comparable to US & impacting travel research

In 2015, smartphone penetration rate grew to 68%,  
representing a year-over-year growth of 24%



More than 40%  
of Canadian  
mobile travelers  
research local  
activities or  
destinations on  
their mobile  
devices



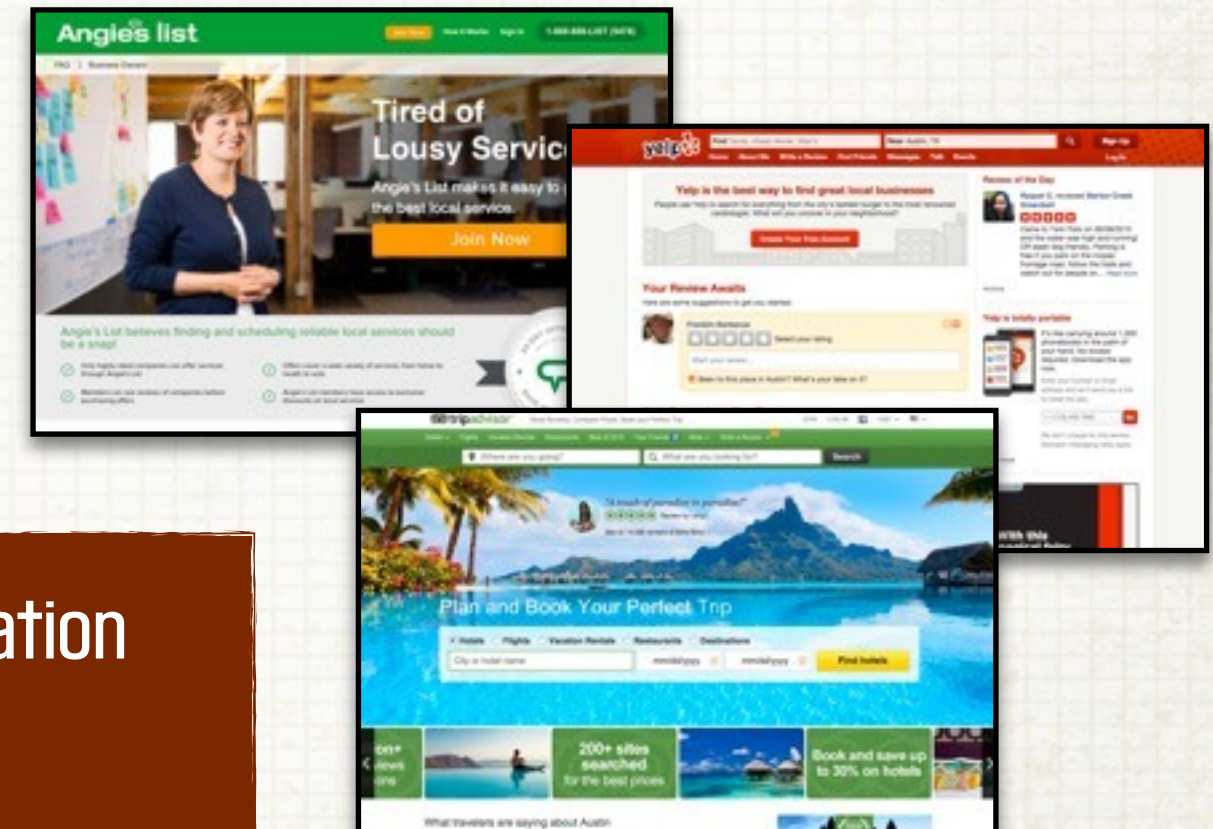
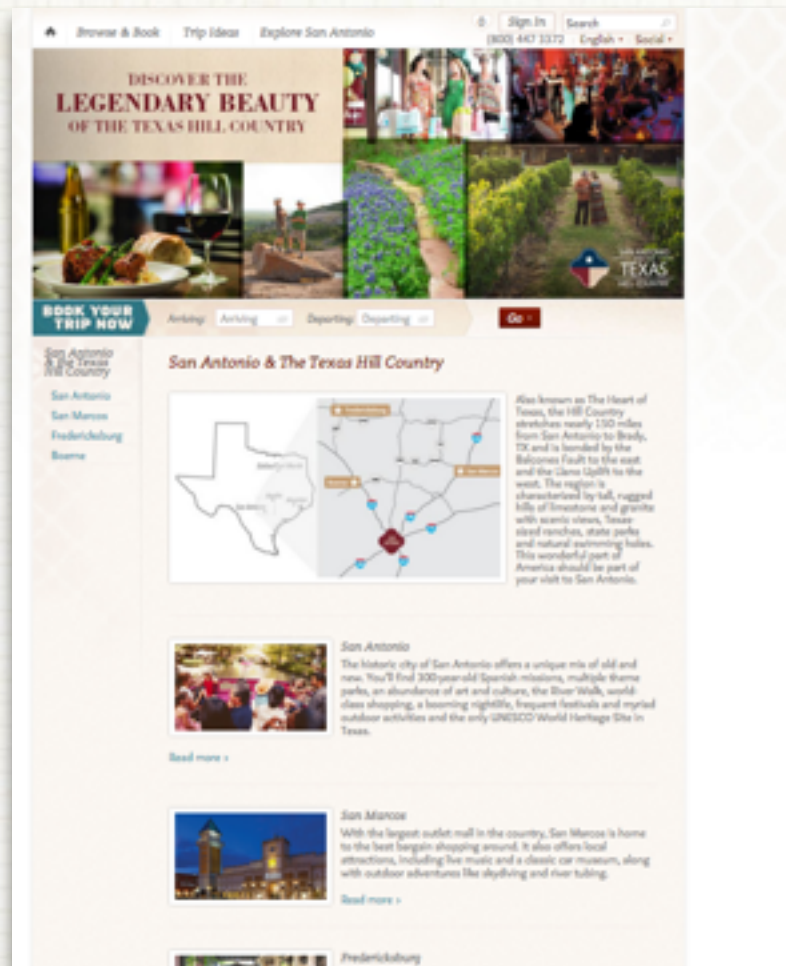


# When it comes to travel, Canadians look to recommendations

55% rely on recommendations garnered from family, friends and colleagues while 49% say review websites are a top information source for travel



Destination-specific sites are a top source of travel information (57%) with travel content sites (55%) a close second







# There is a reliance on sites for comparing rates & travel booking

## METHODS USED TO BOOK TRAVEL







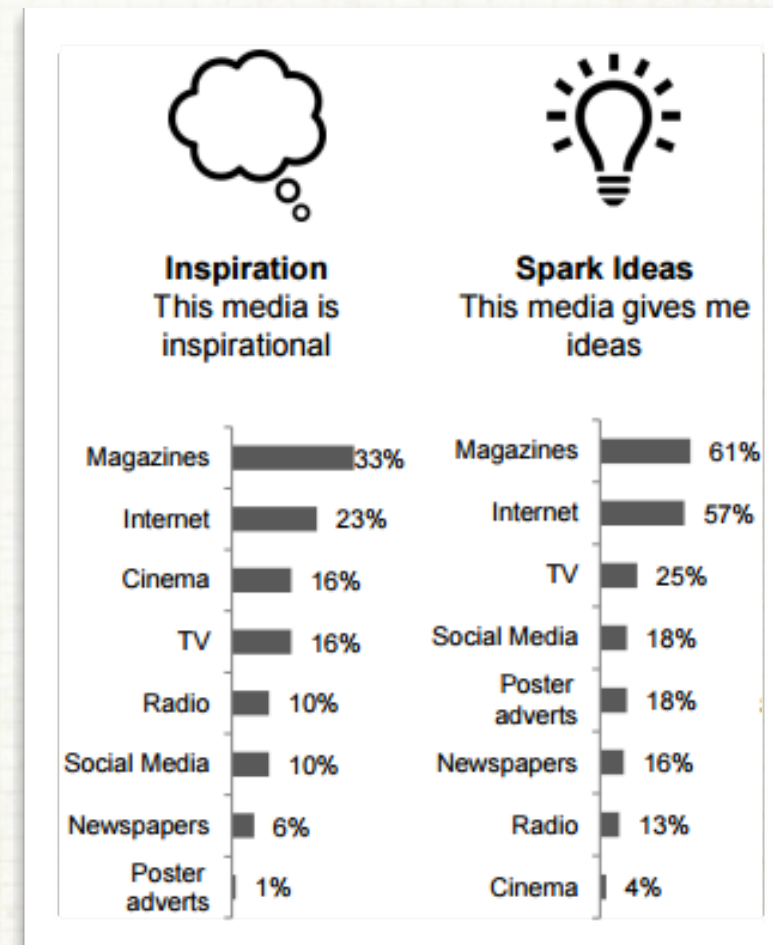
# Magazines influence, inform and inspire readers to learn more

Information leads to action



33% find magazines to be inspirational and 61% say that magazines spark ideas

2 in 3 people read magazines specifically for the information they provide and 3 in 4 have researched a product after seeing it in a magazine







# Key takeaways from travel trends & FY15 highlights

Websites and recommendations impact the travel planning and booking journey for Canadians

Mobile first in Canada. Usage is a key part of the travel process for Canadians mirroring the US

Magazine readers are an engaged audience.

They're inspired by and take actions based on the content provided



A large, light brown sunburst graphic with many thin rays emanating from a central point, positioned behind the title text.

# Canada FY16 Media Recommendation





# Focus on Canada when weather is particularly cold

Hill Country Canada Budget: \$42.8K

## Audience

Primary: Travelers, A25-54, \$75K+  
married & single, without children



## Timing

Priority 1: Fall & Winter 2015

Priority 2: Fall 2016





# FY16: Digital strategy focuses on review driven platforms







## FY16: Traditional media strategy focuses on print

Reach the target in a place where they find inspiration in their lives, through one of Canada's leading magazine titles



Plan activity during winter months, when Canadian's need travel inspiration the most

Leverage BUSA returns to increase frequency and continuity







# FY16 NEW: Print partners details

\$25K | 500K Impressions | FP4C



## Canadian Living

Canada's most read Woman's magazine, providing them with lifestyle content from beauty and fashion to home trends.

Frequency: Monthly

Circulation: 505,398

National Distribution (50%+ in Ontario Region/Toronto)

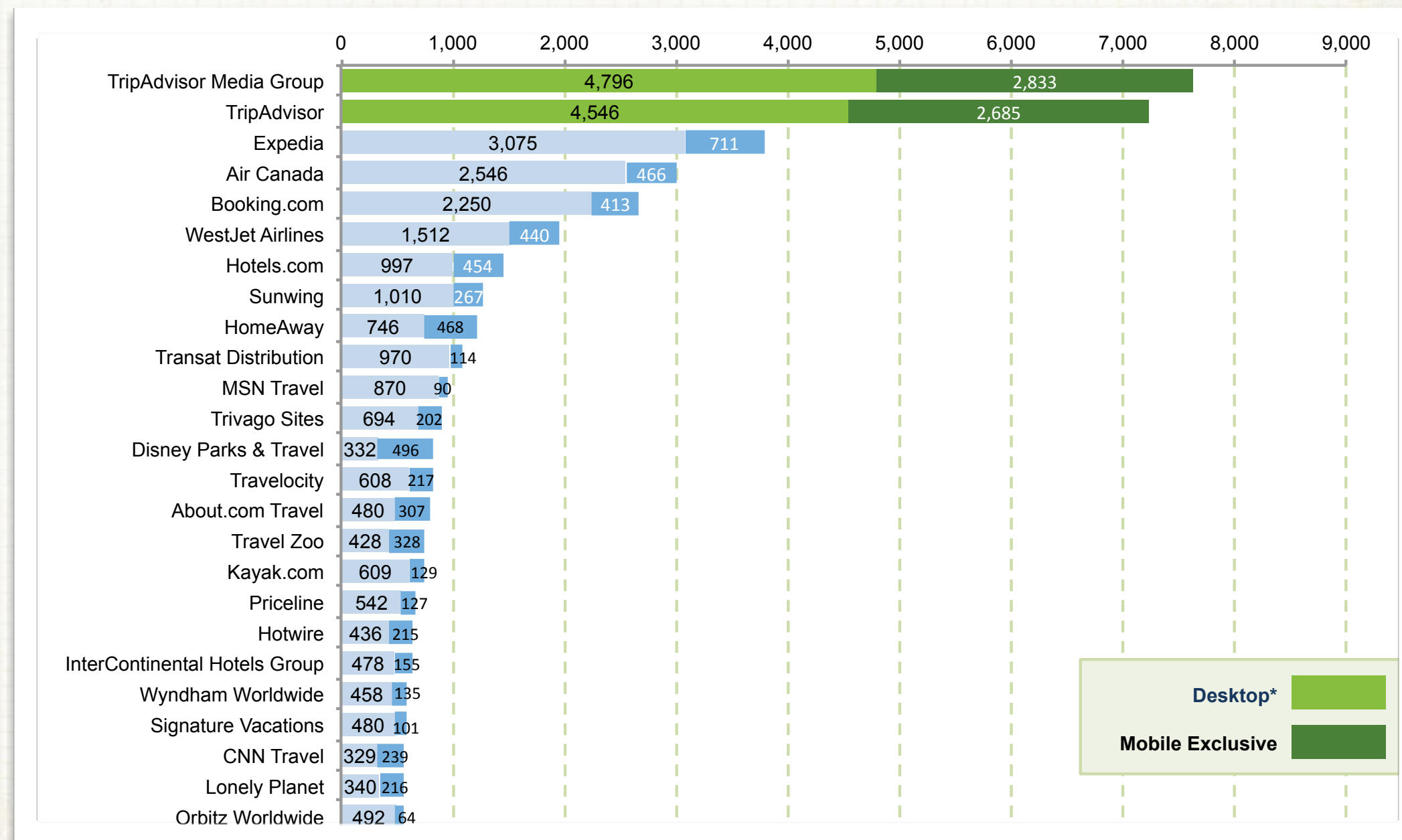
Recommendation: 1 FP4C Insertion  
Feb





\$17.3K Total | 960K Impressions | \$18 CPM | 320x50, 300x600, 300x250, 728x90

**OPPORTUNITY:** Reach Canadians on their top travel planning site across desktop and mobile with advanced targeting to not only Toronto & Calgary IPs but also travelers with an interest in cultural travel and those that have shown an interest in Texas







# facebook.

\$5.1K Total | 5.1K Clicks | \$1 CPC

Utilize Facebook's scale and targeting to reach Canadians in key markets and increase digital touch points





# Summary: FY16 Canada Outreach

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Canada Hill Country Total w/ BUSA: \$48.9K

Hill Country Contribution: \$42.7K

(\$21.7K Traditional | \$21K Digital)

BUSA Contribution: \$6.2K

(\$3.3K Traditional & \$2.9K Digital)

500K Trad Imps | 3.5MM Digital Imps

5.1 K purchased clicks



# Thank you for your partnership!

San Antonio \$60,000

Boerne \$30,000

Fredericksburg \$30,000

San Marcos \$30,000

TOTAL \$150,000

Each city brings a unique value to the Hill Country offering for international visitors





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# Summary & QA/Next Steps



# Summary: Traditional Flowchart (Mexico + Canada)

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	HC	BUSA	Total	Imps
<u>MEXICO</u>																
Aire													\$16,522	\$2,478	\$19,000	5MM
Travel & Leisure													\$4,174	\$626	\$4,800	93K
Quien													\$4,865	\$730	\$5,595	120K
MEXICO SUBTOTAL													\$25,561	\$3,834	\$29,395	5.3MM
<u>CANADA</u>																
Canadian Living													\$21,739	\$3,261	\$25,000	500K
CANADA SUBTOTAL													\$21,739	\$3,261	\$25,000	500K
GRAND TOTAL													\$47,300	\$7,095	\$54,395	5.8MM



# Summary: Digital Flowchart (Mexico)

Partner	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	SAHC	BUSA	TOTAL	CPM/ CPC*	Imps	Clicks
Adtheorent													\$23,000	\$3,450	\$26,450	\$6.45	4,100,775	
Expedia													\$18,000	\$2,700	\$20,700	\$11.82	1,751,269	
Quien													\$8,000	\$1,200	\$9,200	\$32.00	287,500	
Facebook													\$16,609	\$2,189	\$18,798	\$0.10	39,162,708	187,981
Google													\$3,500	\$480	\$3,980	\$1.25		3,184
Ad Serving													\$2,337		\$2,337			
TOTAL													\$71,446	\$10,019	\$81,465		45,302,252	191,165



# Summary: Digital Flowchart (Canada)

Partner	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	SAHC	BUSA	TOTAL	CPM/CPC	IMPS	CLICKS
TripAdvisor													\$15,000	\$2,250	\$17,250	\$18.00	958,333	-
Facebook													\$4,458	\$669	\$5,127	\$1.00	2,563,350	5,127
Ad Serving													\$1,500		\$1,500			
TOTAL													\$20,958	\$2,919	\$23,877		3,521,683	5,127



# Budget Breakout

	Hill Country	BUSA	Total
Digital - Mexico	\$71,446	\$10,019	\$81,465
Traditional - Mexico	\$25,561	\$3,834	\$29,395
Mexico Subtotal (Digital & Traditional)	\$97,007	\$13,853	\$110,860
Digital - Canada	\$20,958	\$2,919	\$23,877
Traditional - Canada	\$21,739	\$3,261	\$25,000
Canada Subtotal (Digital & Traditional)	\$42,697	\$6,180	\$48,877
Total International Budget	\$139,704	\$20,033	\$159,737



# QA & Next Steps



**11/17 Client Presentation**

October & November mini buys - live

**11/20 Approval on full year plan**

**11/20-12/1 Final buying & trafficking**

**12/3 Launch of full year plan with Expedia**