

Spearfish

**The Digital Repeat Visitor
Program**



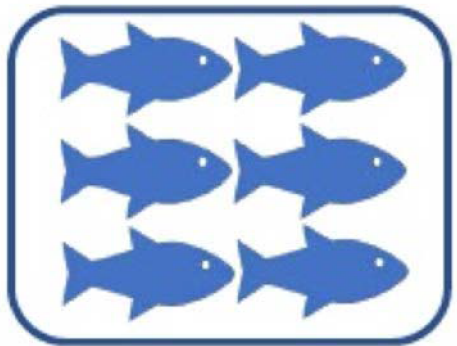
Since 1994 Phoenix International Publishing has served the international inbound travel market to the USA with media aimed at the repeat visitors that create the foundation of that market segment.

Its products include the award-winning magazine Essentially America, domestic and international destination guides, digital content, social media, and since July 2020, Spearfish.

PIP products reach international travelers in 16 countries across five continents. With its international preview in 2019 and domestic roll-out in 2020, Spearfish enhanced the company's digital presence and created to a new, robust digital tourism marketing presence

Spearfish leverages credit card spending data as a means of identifying prior visitation. Destinations, lodging partners and attractions can hyper-target those who are the core of the international inbound as well as domestic markets. Your digital advertising is delivered via a series of market-specific brand-safe websites.

In nearly three years, Spearfish is already partnering with more than 80 destinations, hotels and attractions, with 247 campaigns accounting for some 241 Million impressions



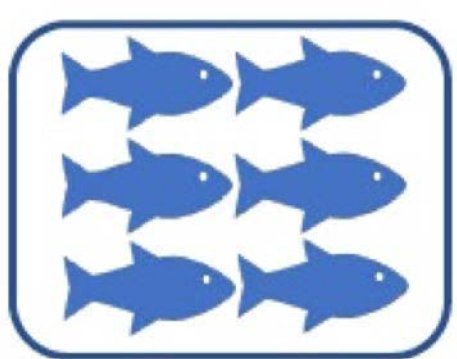
Digital Repeat Visitor Program - 2019

What is now called **Spearfish** was a pilot program with **Explore Minnesota Tourism** and **Partners in Support of a New Delta Flight to MSP** from Korea.

1.5 Million Impressions to South Koreans Who Had Visited the USA in Prior 12Months

Click-Through-Rate was significantly above the norm for IAB Standard Display Ads

The collage displays a Korean news portal interface. At the top, it shows the date '2019.05.04(토)' and the website name '한국경제'. The main content area features several news items with images and headlines, such as '단독 KDB생명 매물로 나온다' and '한경원 문 대통령 직속'. Overlaid on the page are several digital advertisements. One prominent ad is for '미네소타행 직항 미국으로 가는 문호' (Direct flight to Minnesota, a window to the world), featuring the 'Mall of America' and the 'Explore Minnesota' logo with a fish icon. Another ad shows a person standing on a rocky shore with the text '델타항공에서 매일 운항하는 인천발 세인트폴행 직항으로 미네소타를 경험해보세요.' (Experience Minnesota with a direct flight from Incheon to St. Paul, Minnesota, operated by Delta Airlines every day). The bottom right corner of the collage shows a list of '가장 많이 본 뉴스' (Most viewed news) items.

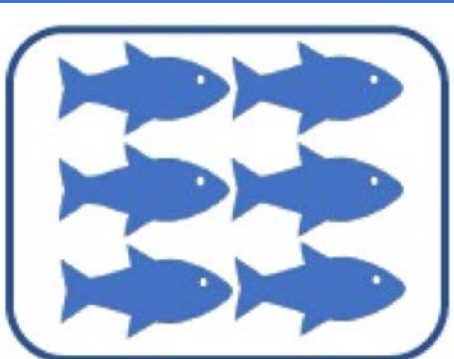


Since July, 2020

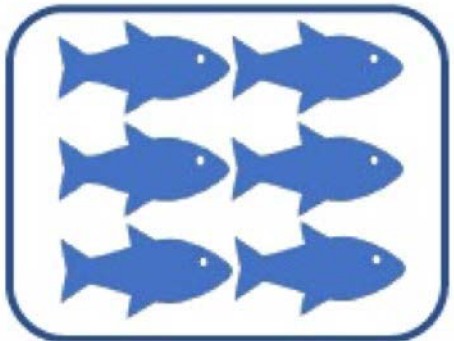
That lead to
the launch of
Spearfish

From a
standing start
it has
generated:

- 247 Campaigns
- 241 Million Impressions
- 62 CVBs
- 20 State/Provincial Tourist Offices
- 5 Destination Coops
- 2 National Tourist Offices
- 1 Native American Nation
- 6 Hotels
- 4 Attractions / Transportation Companies
- Advertising Partners Located in 25 states
- Impressions Served Throughout the USA & in 15 Foreign Countries



Here's Why The Use of Spearfish Is Growing So Rapidly.....

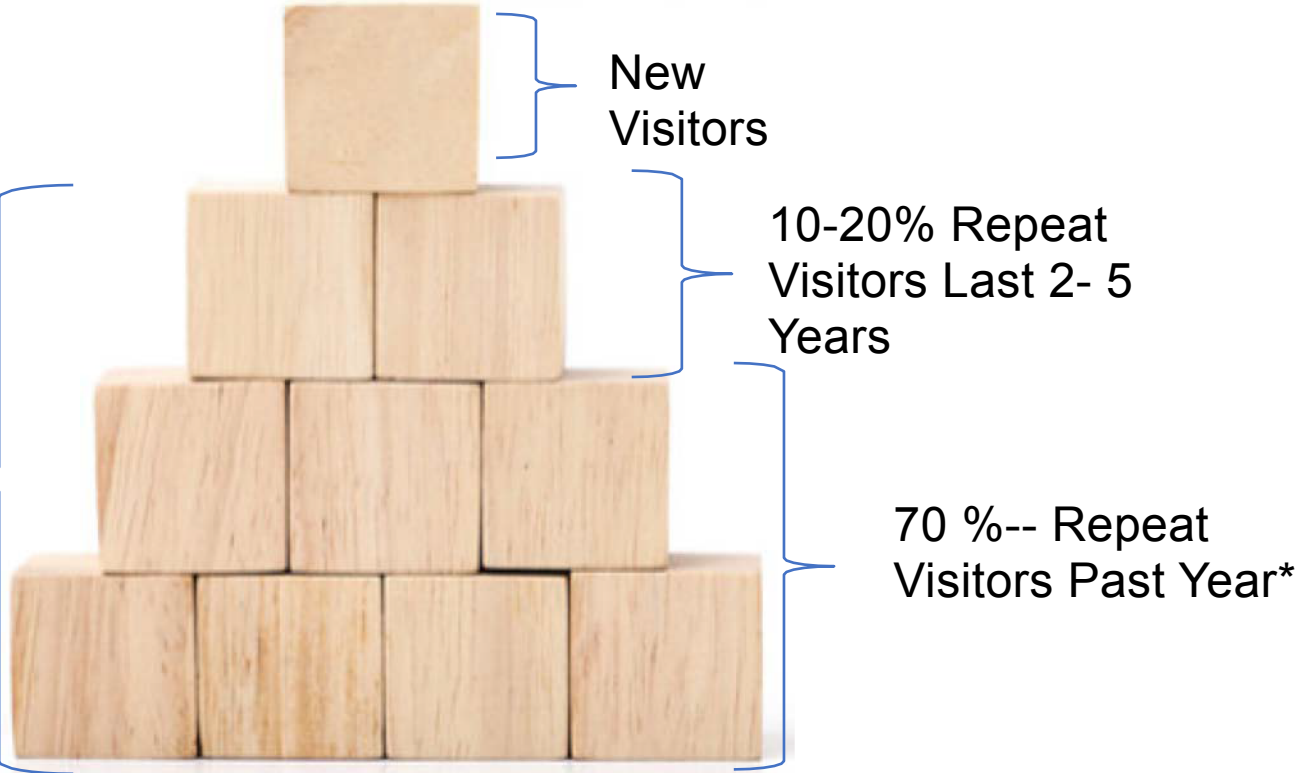


Today -- Repeat Visitors Form as the Base Of Your Destination Visitation...As Much As 90%!

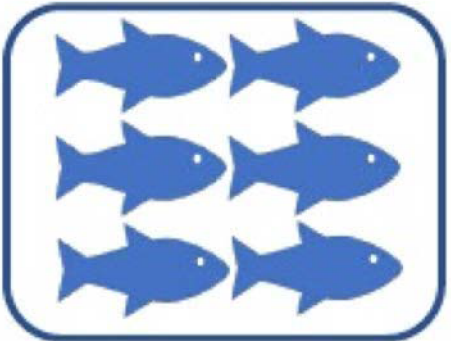
Domestically, for most destinations 70% of visitors in a given year had visited during just the prior 18 months.

The single most reliable indicator of future visitation is those who have visited in the recent past.

Your Tourism Marketing Base



*Sources Include Multiple Destination Visitor Profiles from companies such as Longwoods International, OmniTrak Group, Destination Analysts, Strategic Marketing and Research

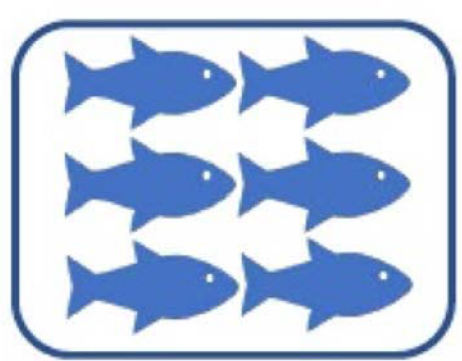
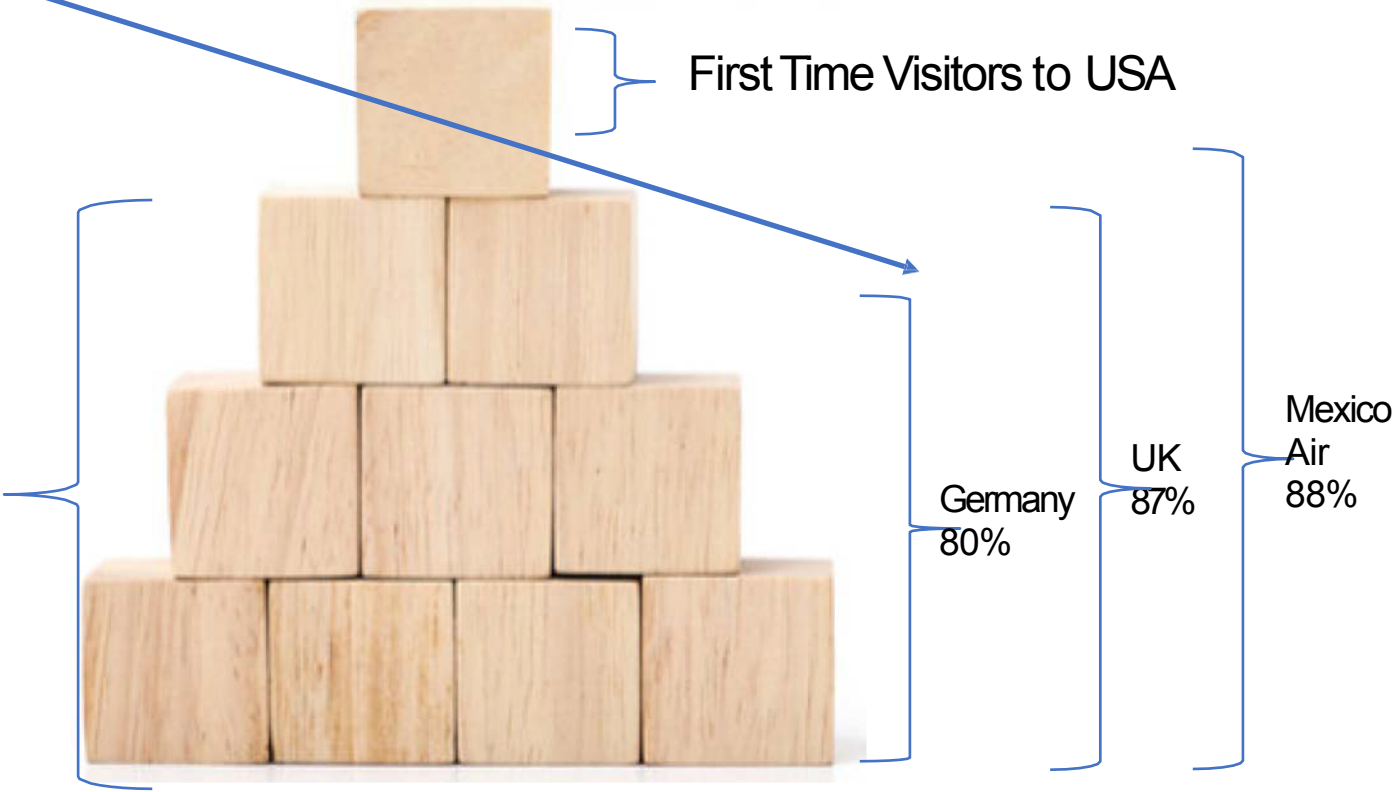


An Example of International Repeat Visitation

This Is Similar to Many Markets

Here Are Examples of the percent of repeat visitors from selected, key international source markets to the USA in recent years.

**Your
Tourism
Marketing
Base**



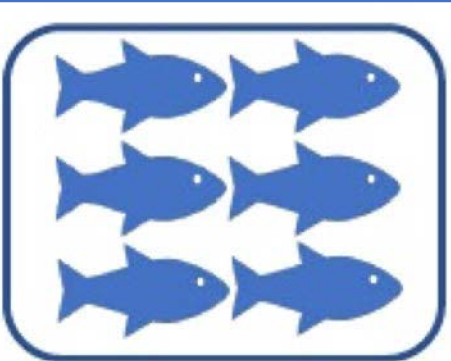
*Source: NTTO/ USDepartment of Commerce

Previous Visitors Are Much Further Down-Funnel New Visitors Need Much More Work And Are More Expensive to Acquire

Reaching prior visitors also makes your advertising more productive

New Visitors Acquisition is also expensive venture. Finding new customers can be as much as 6x more expensive than retaining current ones*

Source: American Express

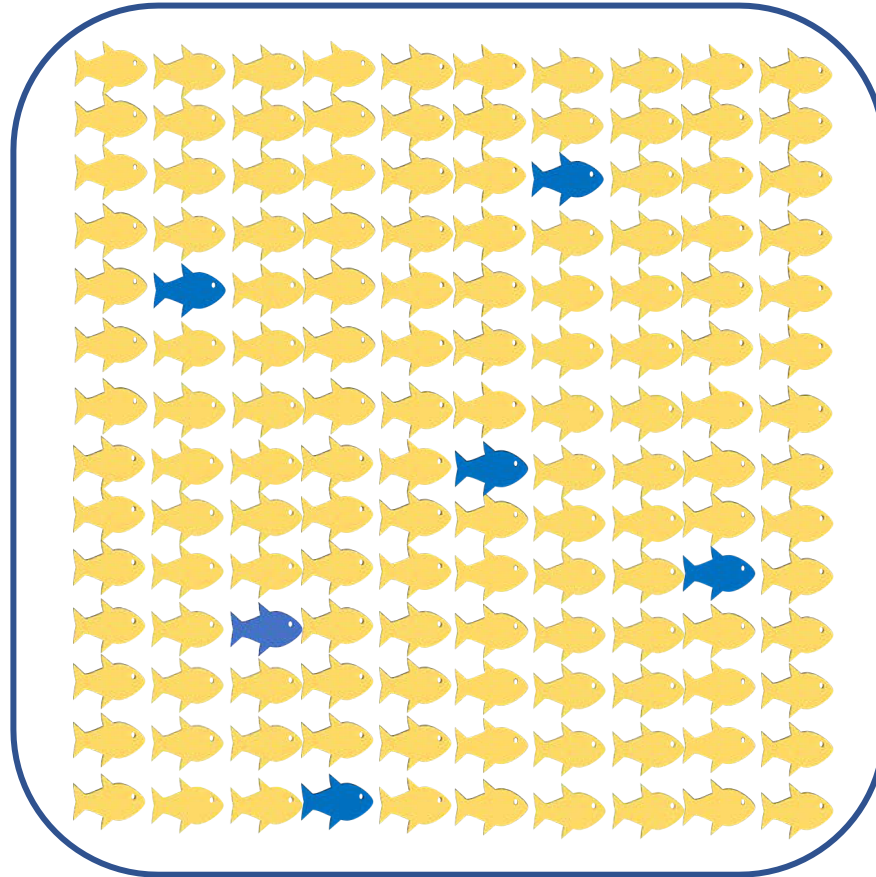


No Prior Visitation Experience
=====
Start at the Top of the Funnel
=====
Conversion Could be Years Away

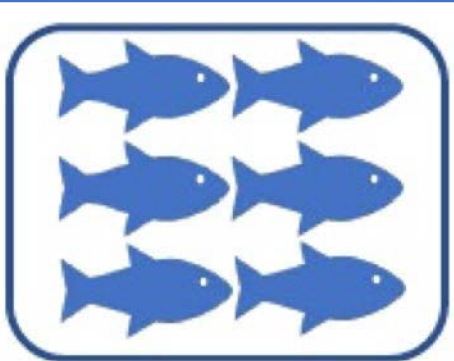
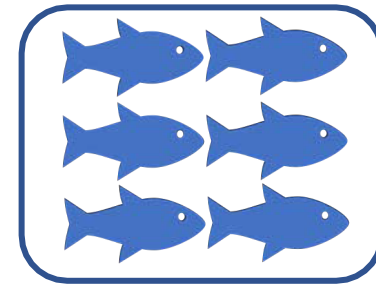


Repeat Visitors Are Already Down-Funnel And More Likely to Convert Sooner

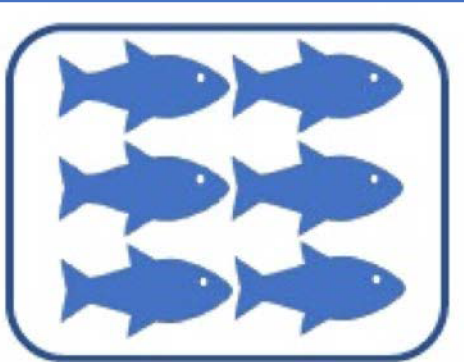
Rather than casting an expensive, wide net...



Spearfish!



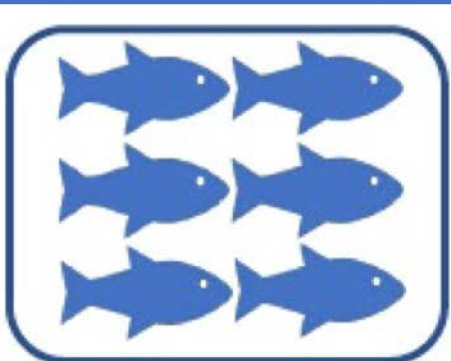
Further, Here's How Advertising to Prior Visitors Beneficially Affects Your Messaging



Research – South Dakota

Those With Prior Visitation Have a Much Higher Perception of South Dakota's Tourism Attributes Than Do Non Visitors

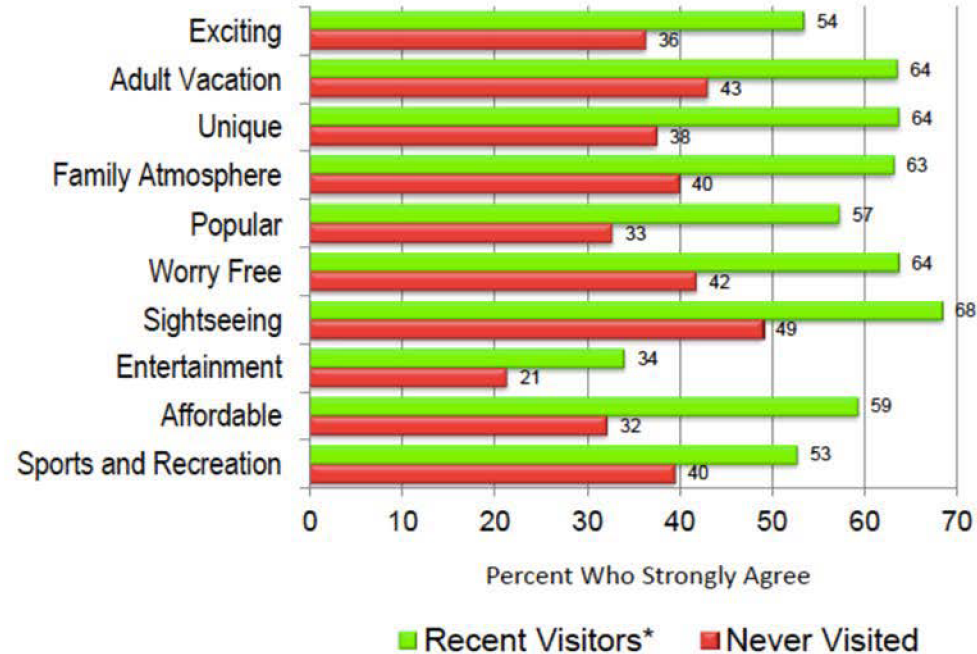
Source: Longwoods International



South Dakota's Product vs. Image



Base: Residents of South Dakota's Regional Advertising Markets



* Visited in past two years

73

Research – Maryland

Return on Investment Analysis (continued)

Evaluating the Campaign's Reach

Maryland's 2019 advertising campaign's reach was moderate. In total, 16.8 percent of all travelers from key markets surveyed recalled at least one of the campaign's advertisements tested. The table below shows overall ad recall rates amongst survey respondents segmented by market and recent visitation to Maryland. Outside of Baltimore and Washington, DC the highest recall rates observed were amongst travelers who reside in the Pittsburgh (17.5%) and New York (17.0%) DMAs. Additionally, travelers who visited Maryland within the last 6 months were much more likely to have recalled the advertising creative tested (26.8% vs. 10.5% for those who did not visit the state in that time period).

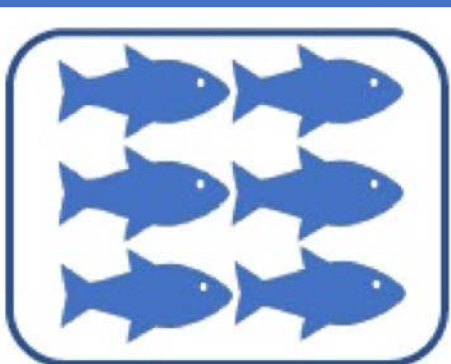
Aided Advertising Recall Rates

	Total	*Albany (Control Market)	*Baltimore	Cincinnati	Cleveland	Columbus	Harrisburg	Philadelphia	Pittsburgh	New York	Washington, DC	Visited MD in the past 6 months	Did not visit MD in the past 6 months
Non-Ad Exposed	83.2%	85.1%	71.6%	83.7%	95.1%	91.3%	86.3%	84.5%	82.5%	83.0%	77.4%	73.2%	89.5%
Ad- Exposed	16.8%	14.9%	28.4%	16.3%	4.9%	8.7%	13.7%	15.5%	17.5%	17.0%	22.6%	26.8%	10.5%
Base	1600	101	102	98	103	103	102	297	103	294	297	624	975

**Please note Albany & Baltimore were excluded from the ROI Analysis*

Those Who Visited
Are Nearly 3x More
Likely To Recall
Seeing The
Advertising

Source: Destination Analysts



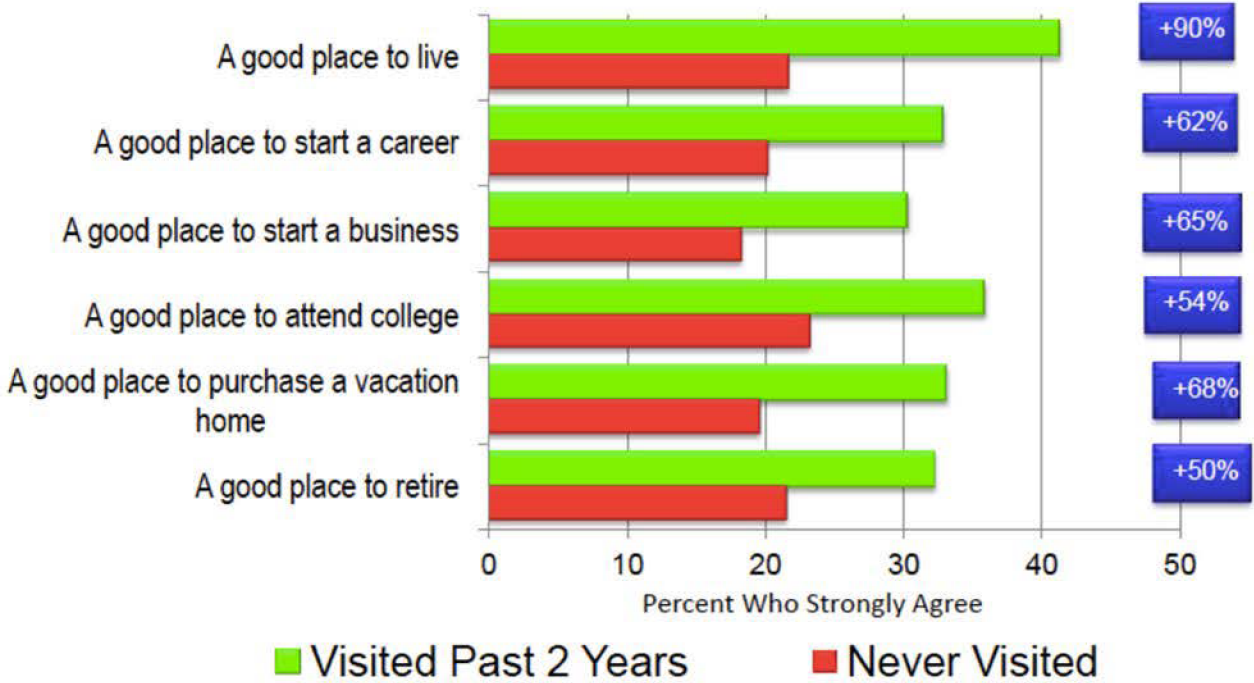
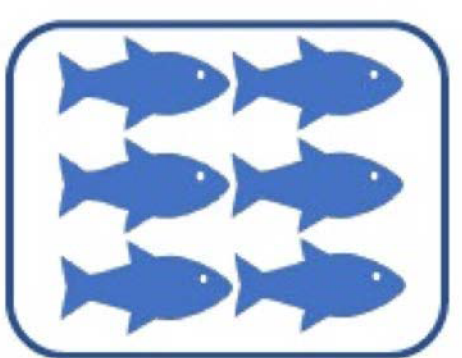
Research – Missouri

Impact of *Visitation* on Missouri's Economic Development Image

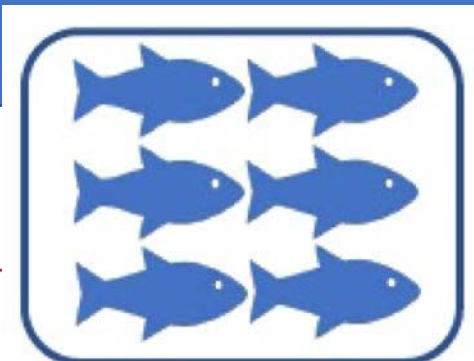
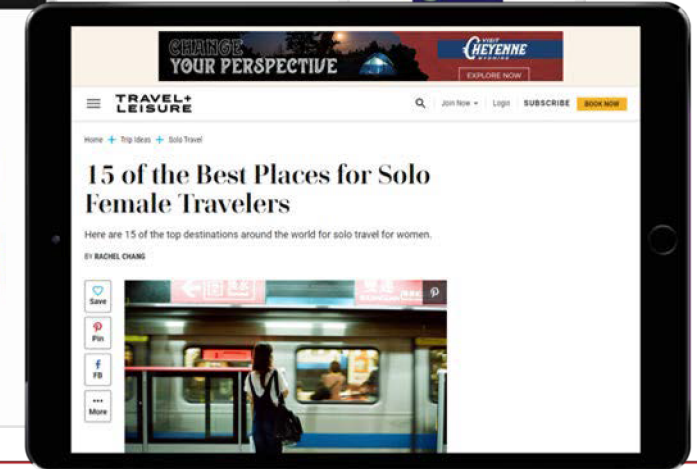
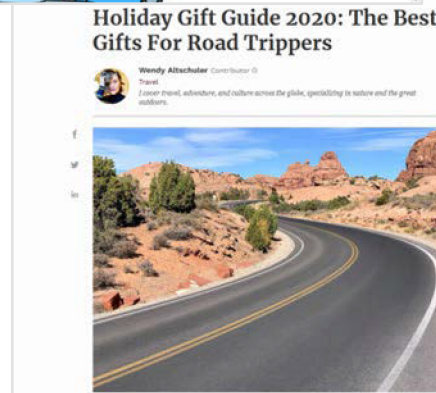
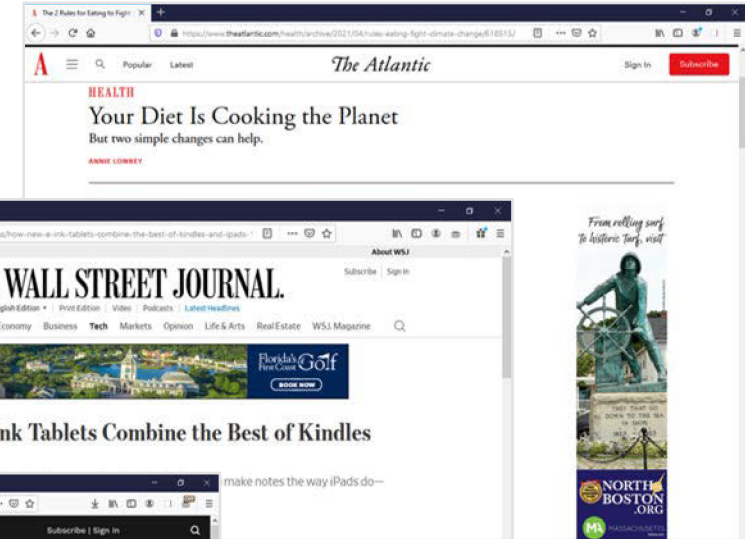
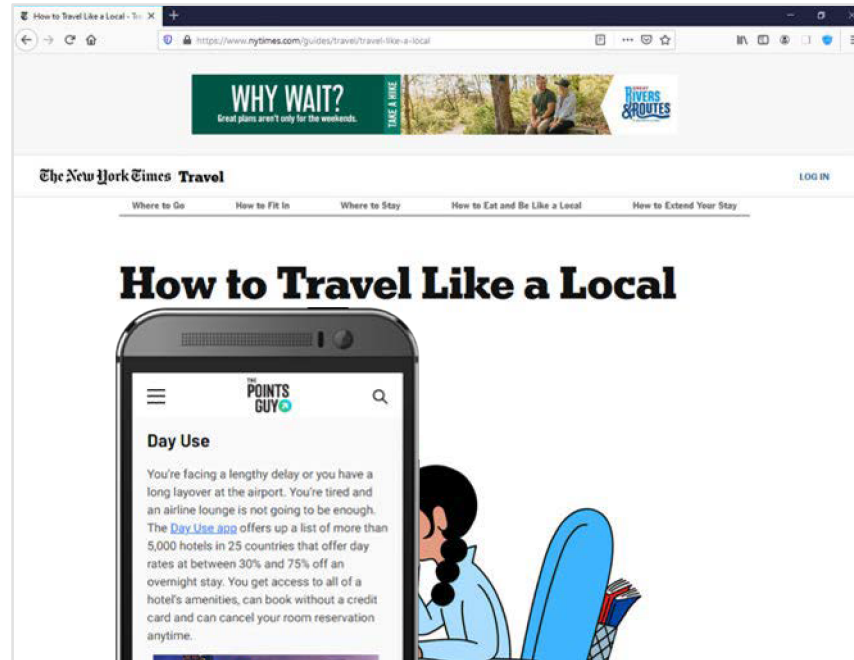


Those Who Visited Have a More Positive Perception of the Destination Relative to Economic Development Attributes

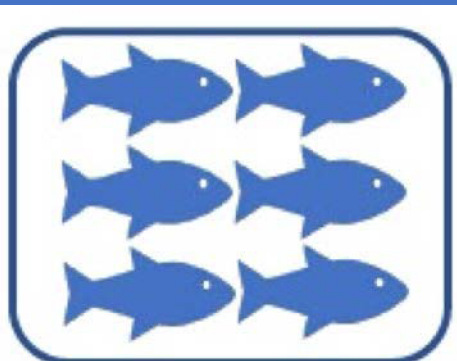
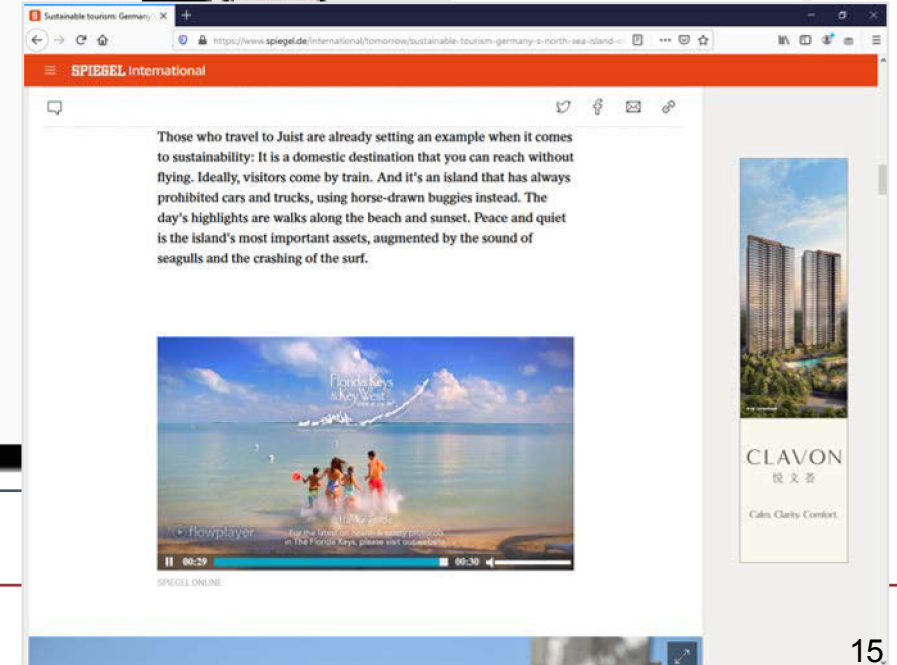
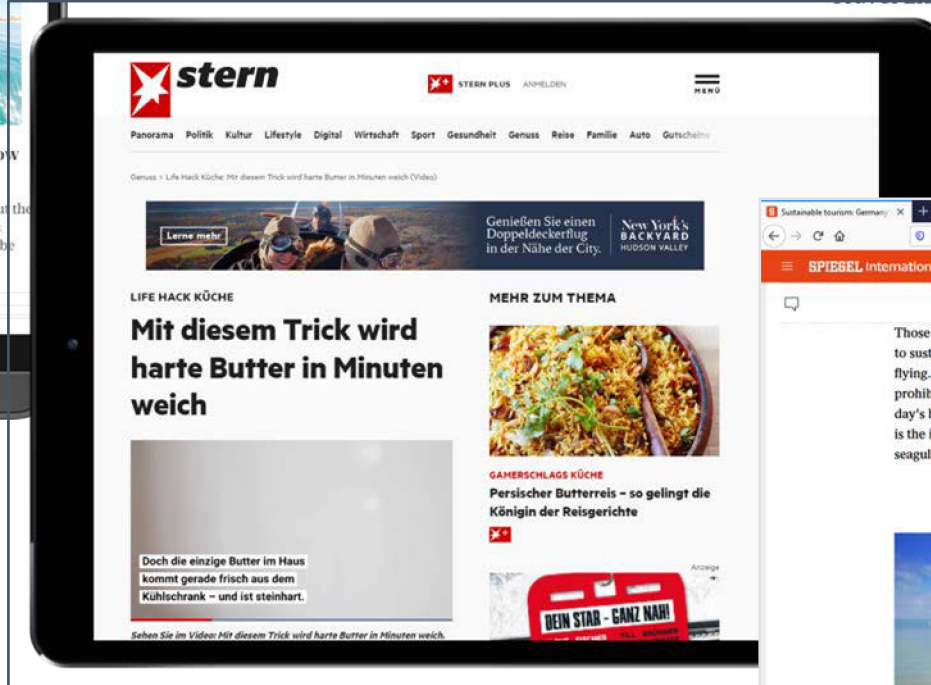
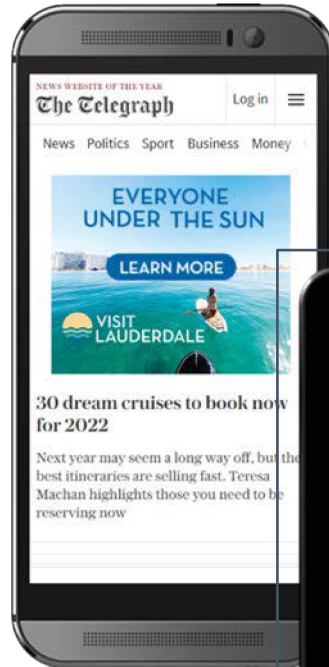
Source: Longwoods International



Examples Of Spearfish Domestic Placements



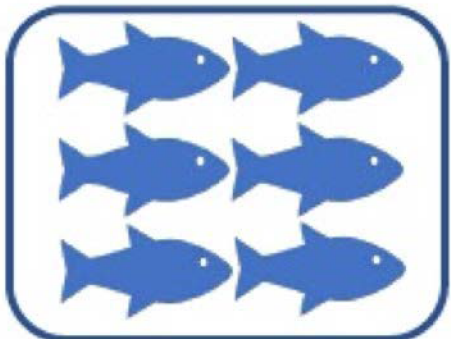
Examples Of Spearfish International Placements



When is the Last Time An Algorithm Visited Your Destination?



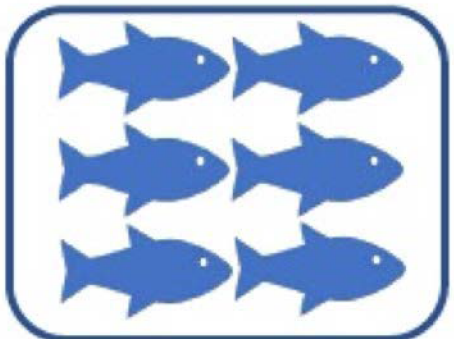
Which All Leads to A
Big Question for Digital
Media Buying!



Other Digital Media Strategies

- “Travel Intender” Algorithms
- Personas
- Audience Models
- Lookalikes
- Retargeting

Here's What We
Are Not

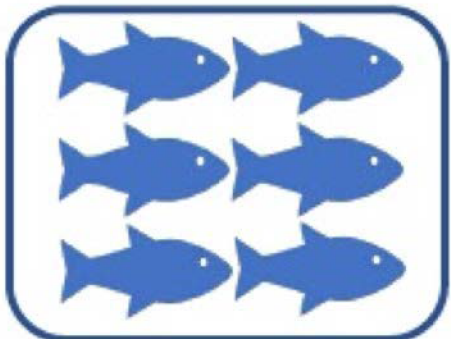


Real Travelers, Who Spent Real Money On Real Credit Cards in Your Destination



Here's
What
We Are

**Those who will likely account for 7 out of 10 your
destination's visitors in the next 12 months**



Advantages of Spearfish Over Other Tactics

Algorithms, models, personas and lookalikes are all variations of the same basic tactic: Replicating behaviors of actual visitors.

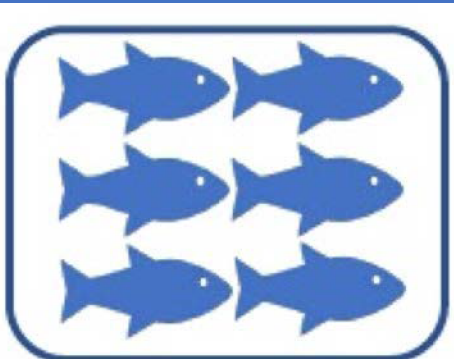
Retargeting allows you to fish in the one pond (your website visitors) but with no assurance that the recipient of your messaging will do anything more than nibble rather than bite

All of the above tactics are perfect for outreach to potential new visitors to your destination. That pool of prospects, though, is likely to only account for 10-15% of your visitors. How much of your budget is allocated to that segment?

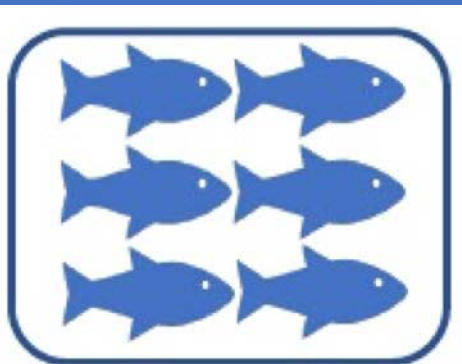
Spearfish takes the learnings of studies conducted by organizations such as Destination Analysts and Longwoods International. They show that on average, ***across the USA, 7 out of 10 visitors to a destination this year this year is rather likely visited the destination during the prior 12 months.***

Spearfish delivers your advertising precisely, effectively and efficiently to that audience

Here's Why



Value-Added
Tour Operator
Engagement
for Your
International
Campaign



Give A Tour Operator Some Love



Your advertising receives an overall 10% uplift if you send the clicks from each country's **Spearfish** activity through to a tour operator in the appropriate country.

Unlike other programs, you select the tour operators to work with.

Several US destinations are already partnering with NATS, Discover North America, America as You Like It, Charitable Travel, Bon Voyage, FTI and Canusa.

The tour operators will have a landing page on their website to which your destination ad clicks are sent. You are the hero. You bring to your tour operator partners the most qualified visitors to their websites....prior visitors to the USA.

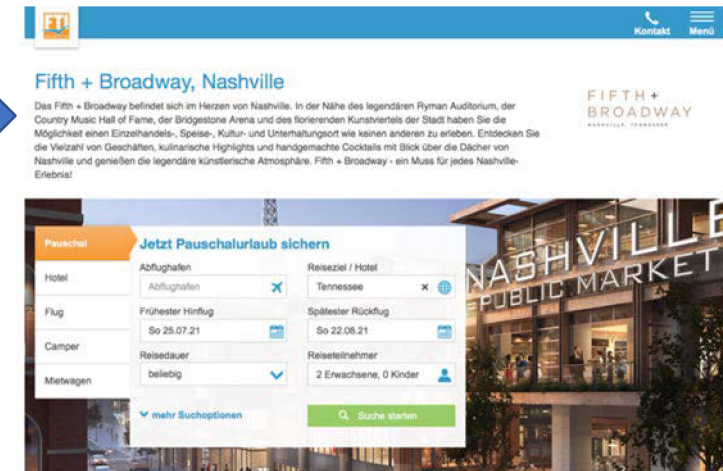
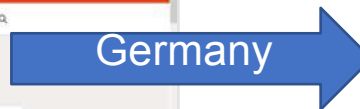
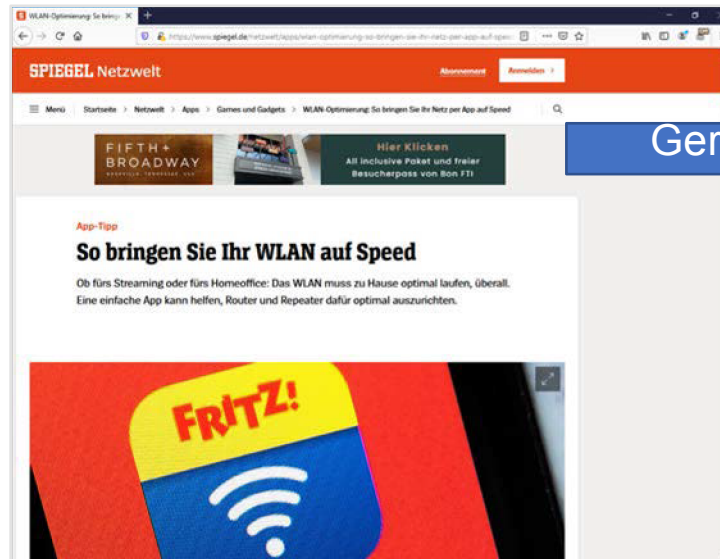
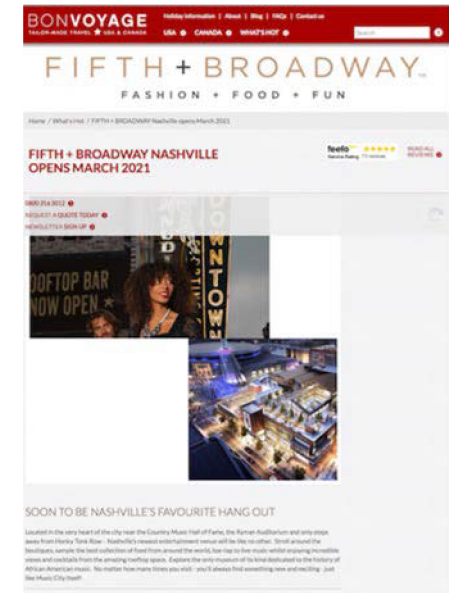
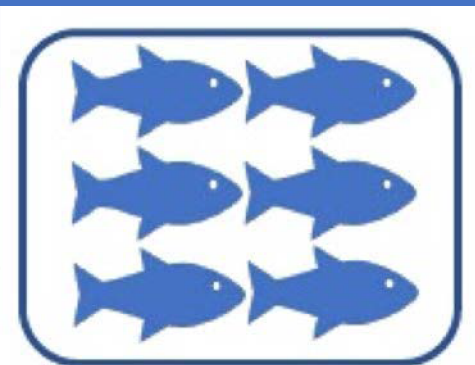
This program is available for you in virtually every international source market.

There is no additional cost to anyone. You receive a 10% bonus. The tour operator selected for each market receives qualified visits to their website.

The Tour Operator Promotion Program provides advertisers with a 10% uplift in impressions (over & above what is purchased) when tour operators are used as the Call-To-Action.

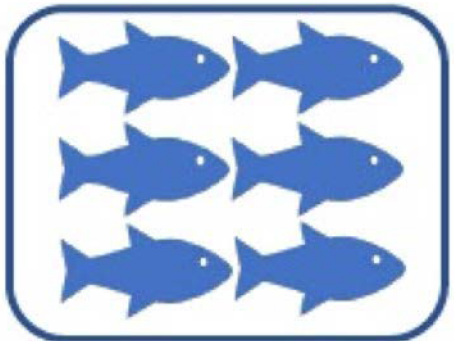
This is at no additional cost to the tour operator or advertiser.

The choice of tour operator(s) with which to partner is fully at the discretion of the Spearfish advertiser



Spearfish

- **More Targeted**
- **More Efficient**
- **More Flexible**
- **More Options**



Specifications

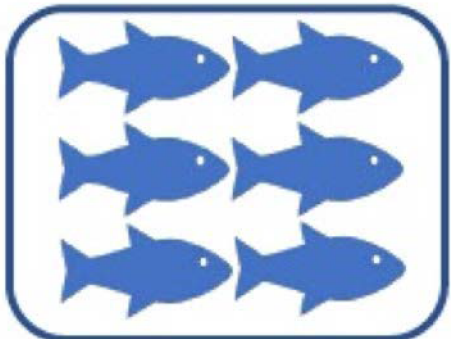
	Video	
	Browser	App*
Placement	In-stream, Out-stream	In-stream
Insertion Point	Pre-roll, mid-roll, post-roll	Pre-roll
Maximum Ad Display Duration	:15, :30, :60	:15 (recommended), :30
Ad Size	Aspect ratio can be 4:3 (standard screen) or 16:9 (wide screen)	
Maximum Frame Rate	n/a	
Maximum File Size	2.2MB	2.2MB
TMT Ad Server Formats	VAST 2.0 FLV, HTML5, MP4, or WebM are required	VAST 2.0, VPAID 2.0 MP4 or WebM are required
Third-Party Ad Server Formats	VAST 3.0, VPAID 2.0 FLV, HTML5, MKV, MOV, MP4, MPEG-1, MPEG-2, OGG, WebM, and WMV files are supported	VAST 2.0, VPAID 2.0 MP4 required

*Video can also be served to a mobile app formatted as rich media through the mobile channel

Please note, :15 or :30 second videos are recommended

Display Specs:
300x250, 728x90 300x600 and
160x600 Jpg or gif, under 100kb

Assets due: At least one week prior to activation date



For More Information Please Contact

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