

USA

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Brand USA

Brand USA Update

Carroll Rheem

VP, Research & Analytics





Credit: NASA/GSFC & AVHRR




Brand USA mission:

Increase INCREMENTAL international visitation, spend and market share to fuel our nation's economy and enhance the image of the USA worldwide.



GO CURIOUS
PLAN YOUR USA TRIP NOW

USA
VisitTheUSA.co.uk



GO LOCAL

PLAN YOUR **USA** TRIP NOW
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Right person
Right message
Right moment



Politics

Protecting
AUTHORITARIANISM
Representative
ALLIANCES
Govern
CONSTITUTIONAL
LAWS
Group
LEGALISM
Autocracy
Oligarchy
Confederation
Citizen
Parties
PEOPLE
GROUP
Vote
Negotiation
Totalitarianism
System
DEMOCRACY
Power
Monarchies
POLICY
LAW
GOVERNMENT
ABSOLUTE
Voting
PEOPLE
Group
CONSTITUTIONAL
POLITICAL

~~**Winning
Strategy**~~



Logic

CONTROL



Analytical

1, 2, 3

Reason

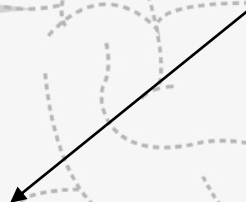
Commercial Opportunity

REALITY

Strategy



Behavior vs. Sentiment



Art

Wishes

Jealousness

Imagination

Music

Love

Peace

Creativity

Freedom

Intuition

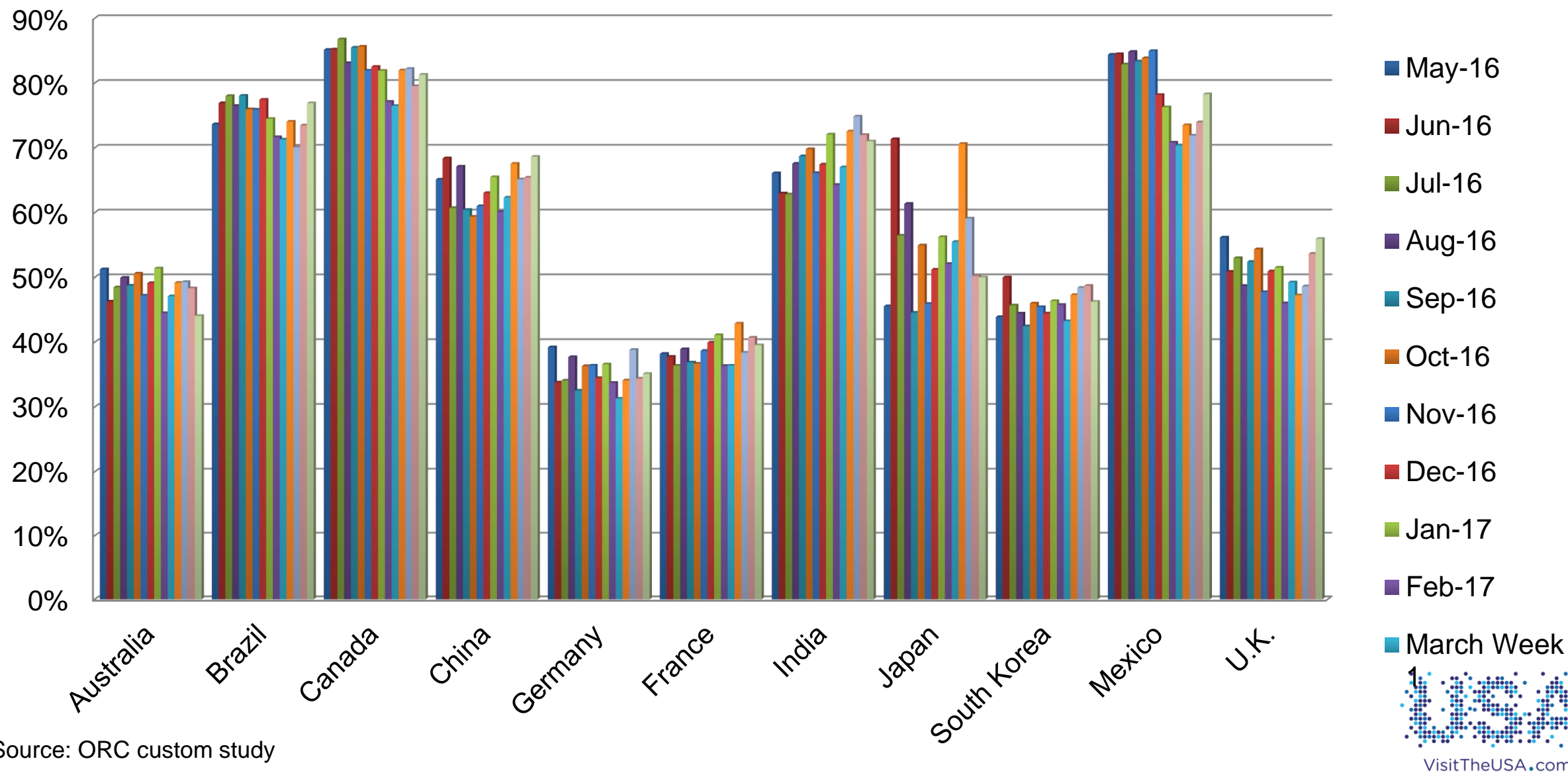
Messaging/Channel Strategy



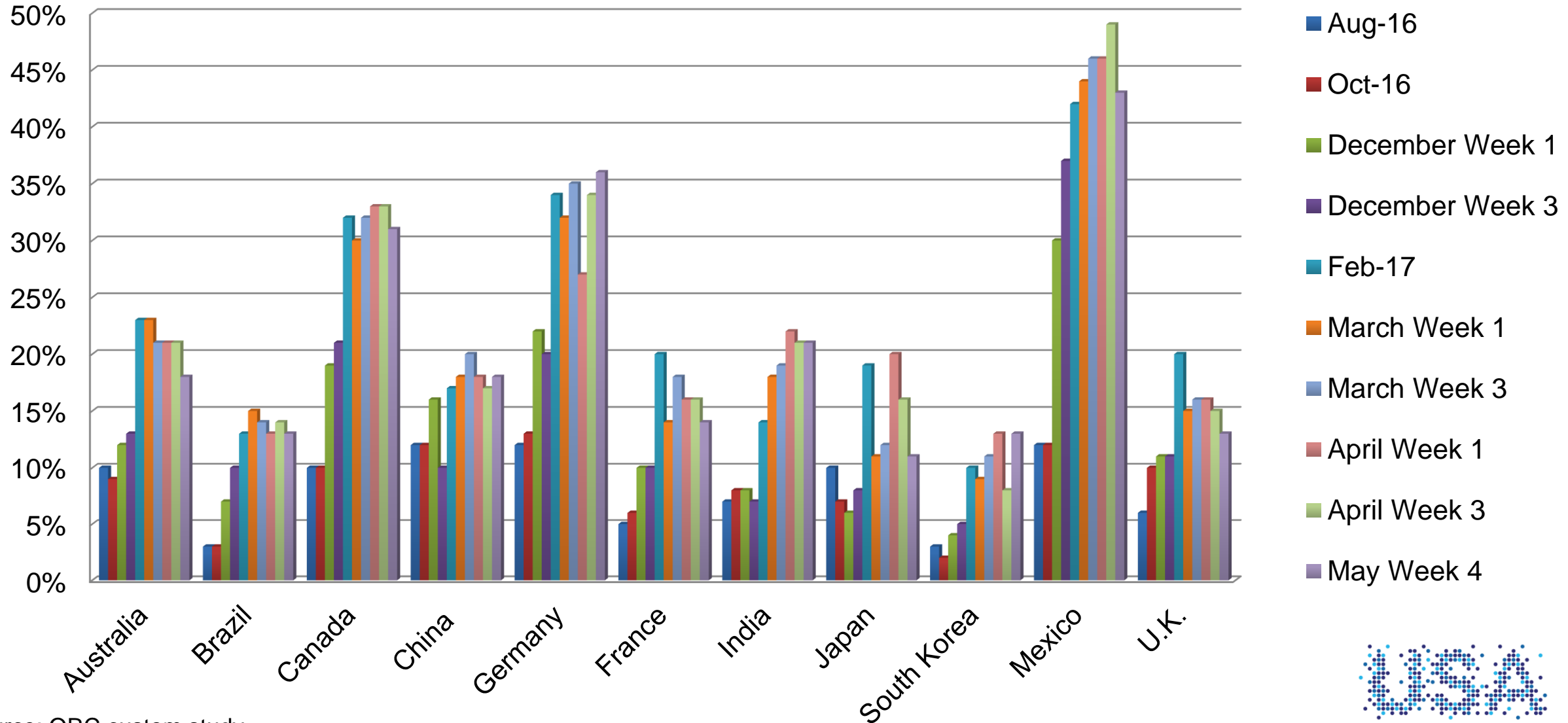


Consumer
Sentiment

Likelihood to Visit in the Next 2 Years



Political Climate as Reason for Not Visiting USA

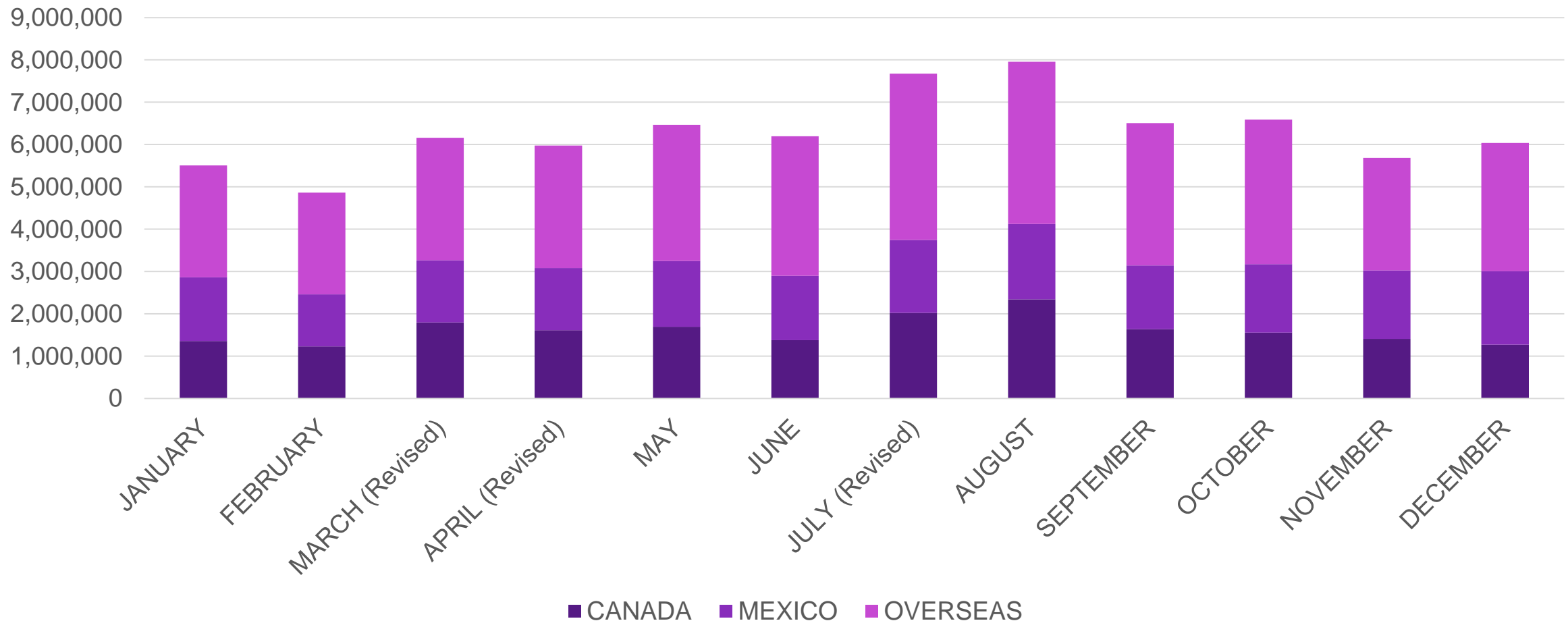


Source: ORC custom study



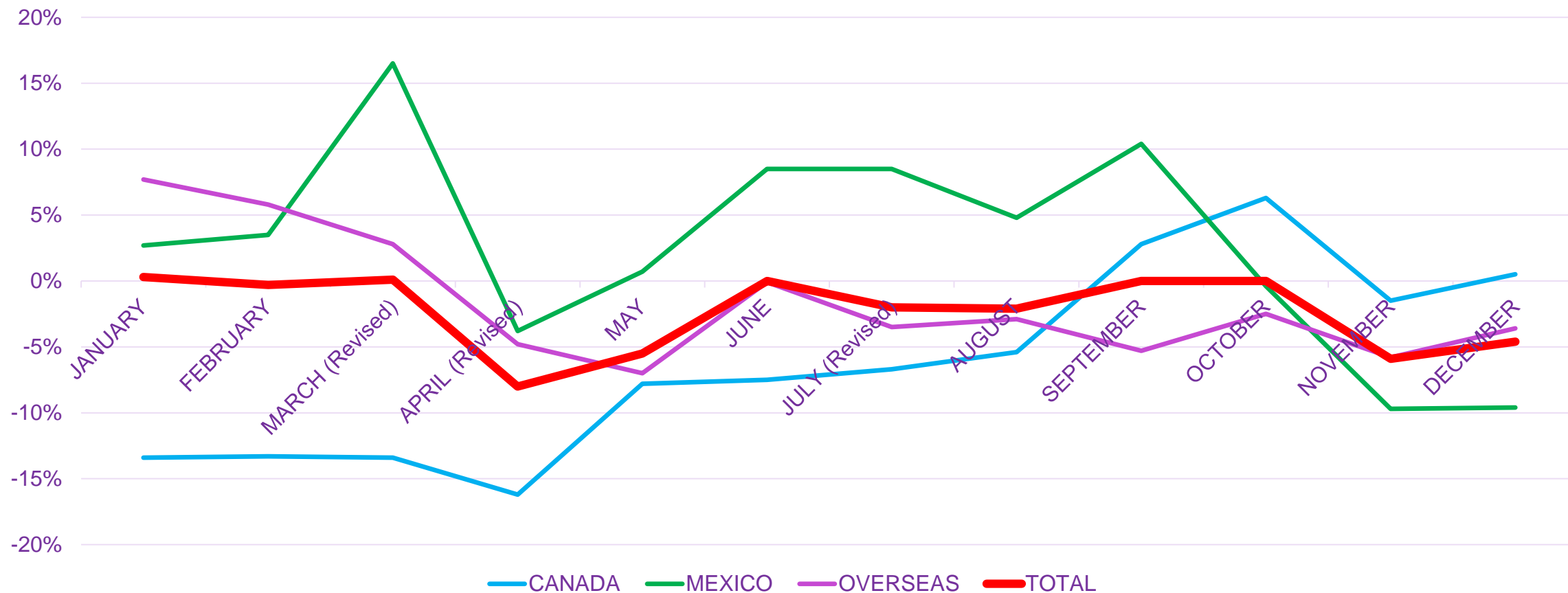
Arrivals

2016 US Arrivals Through September



Source: NTT

2016 US Arrivals Growth

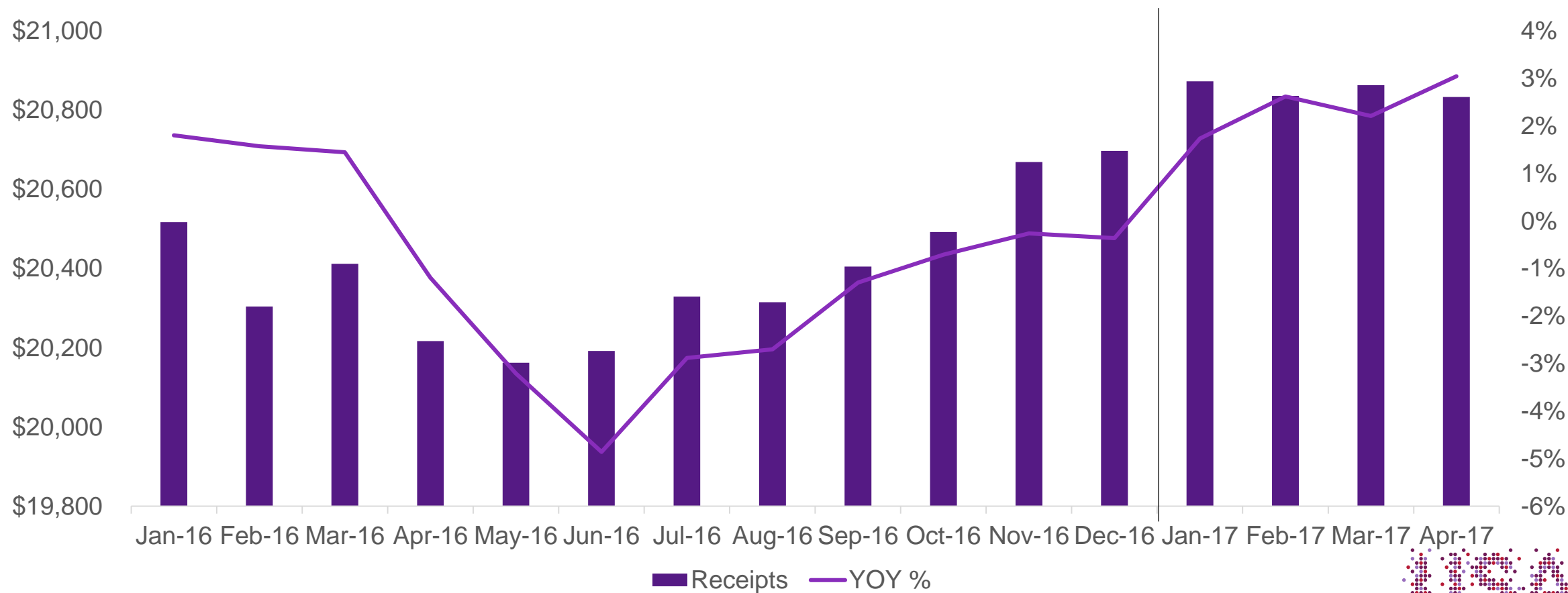


Source: NTTO

Visitor Spending

2016 - \$244.7 Million, -1% YOY

Jan-Apr 2017 - \$83.4 Million, +2.4% YOY



Source: NTT

Currency

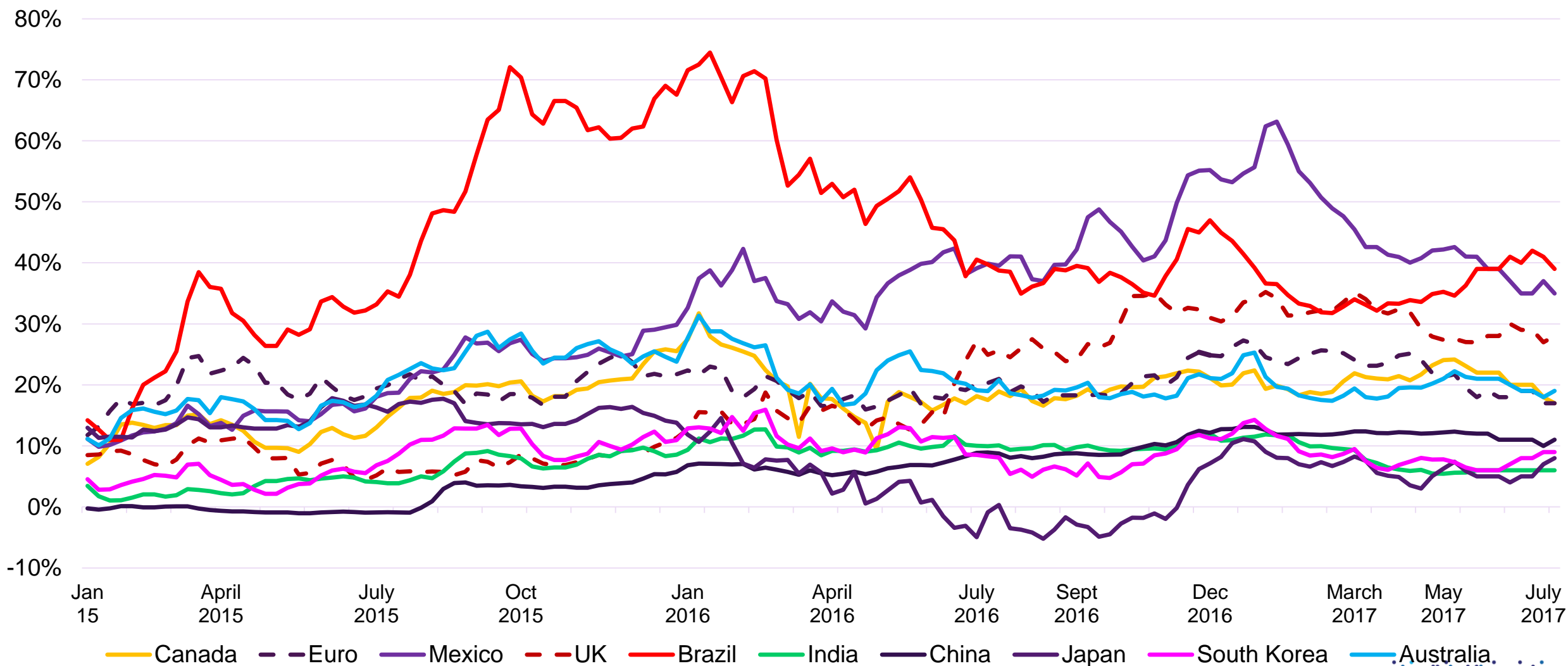




We don't operate in a vacuum

Currency exchange drove a 3.1% decline in arrivals in 2015, equating to a loss of 2.6 million visitors compared to a scenario of no exchange rate shifts.

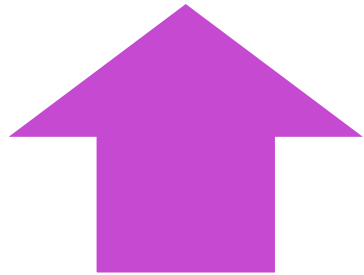
Value of U.S. Dollars through July 2017 (Indexed against 2014 Average)



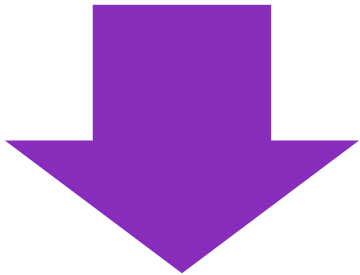


THE OUTLOOK IS CLEAR AS...

Key Factors Driving Pace of Growth



General economic growth
Consumer confidence



Currency
Political sensitivity



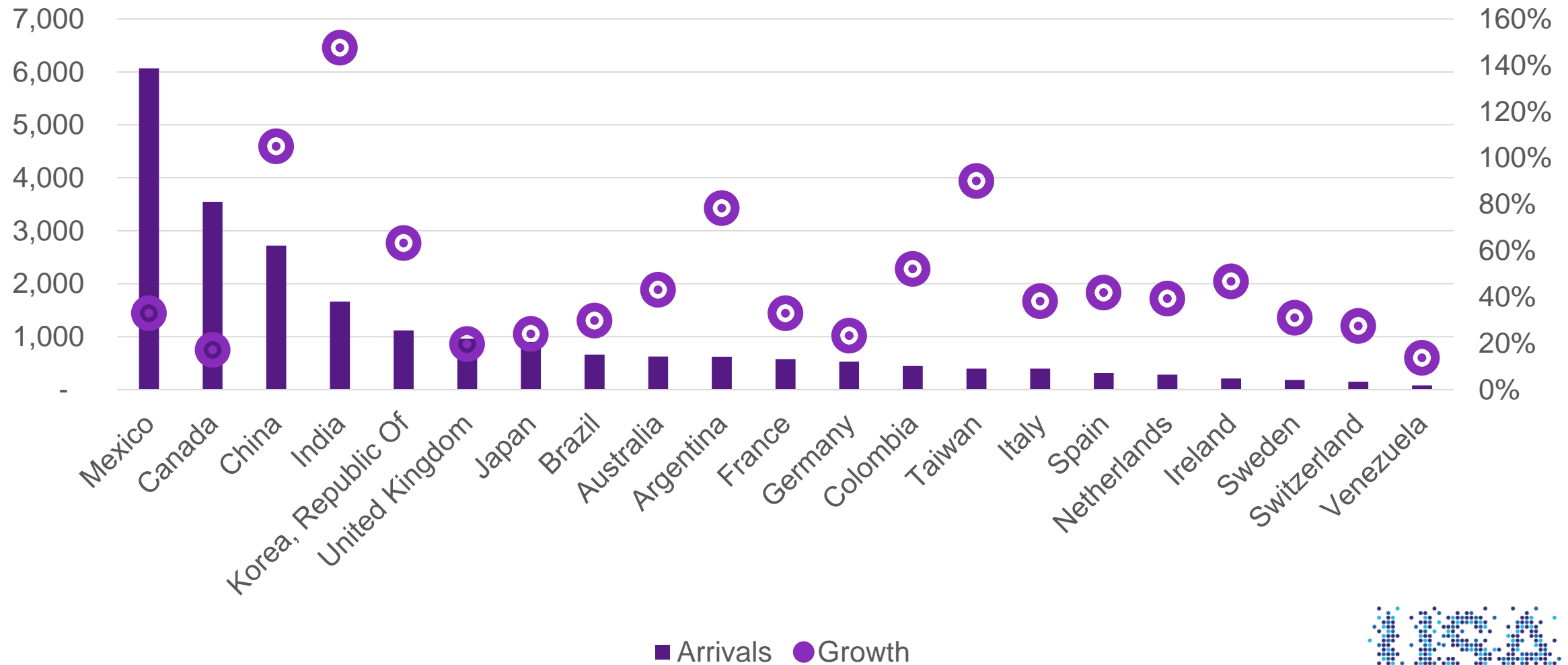
Stock market volatility
Policy changes



Asia's Rise

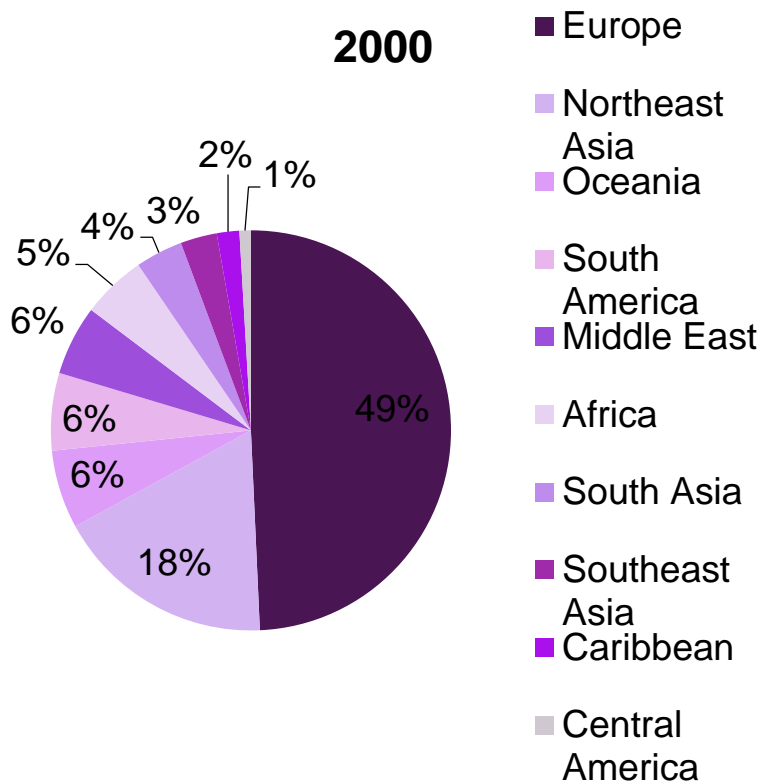
2023 Vs. 2015 Arrivals

(1,000s)

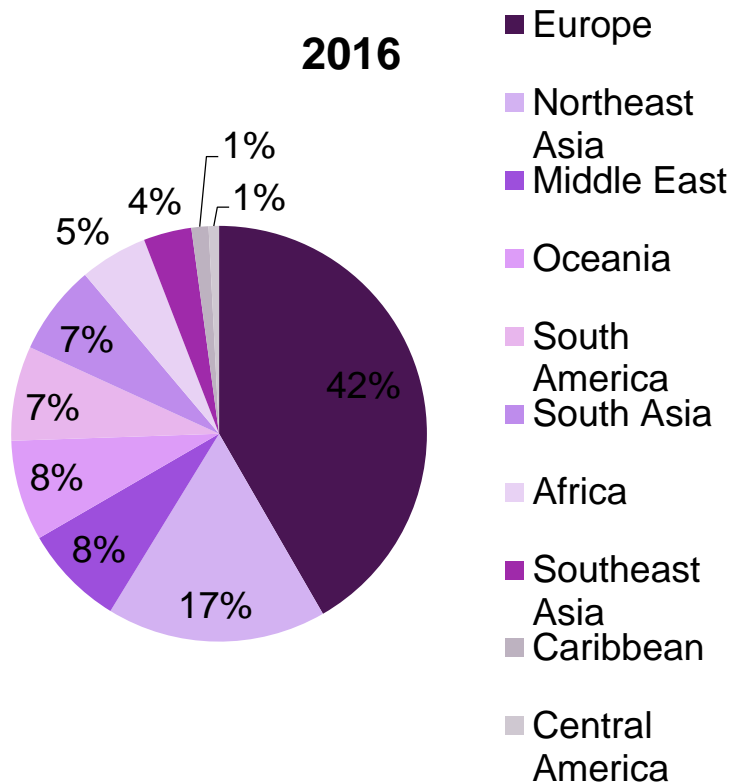


Global Long Haul Trips

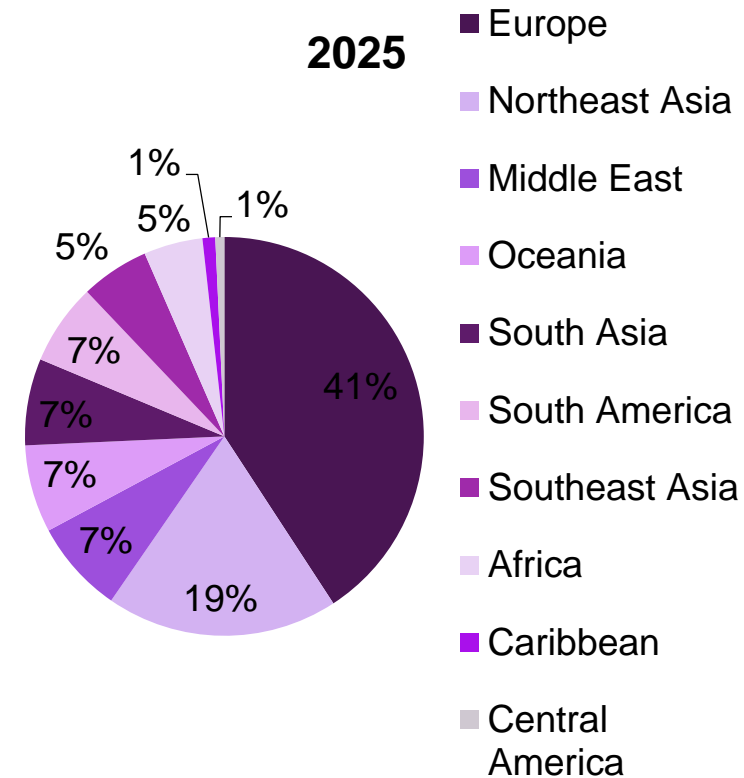
2000



2016



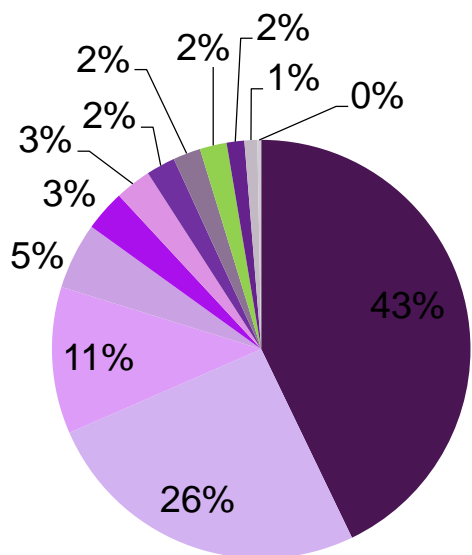
2025



Source: Tourism Economics

USA International Arrivals

2000



Europe-West

Asia-NE Asia

Americas-South

Americas-Caribbean

Americas-Central

Oceania

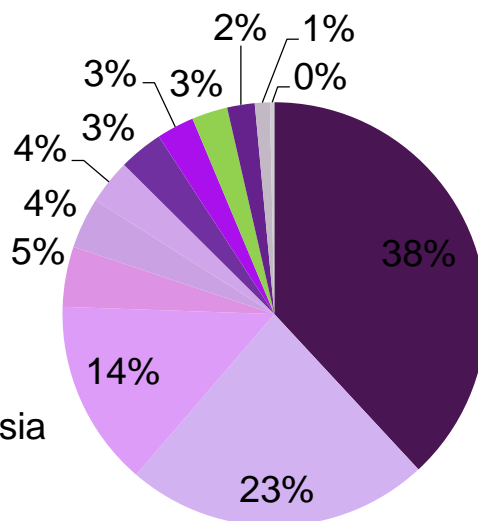
Europe-Emerging

Asia-SE Asia

MEA-MidEast

Asia-S Asia

2016



Europe-West

Asia-NE Asia

Americas-South

Oceania

Americas-Caribbean

Asia-S Asia

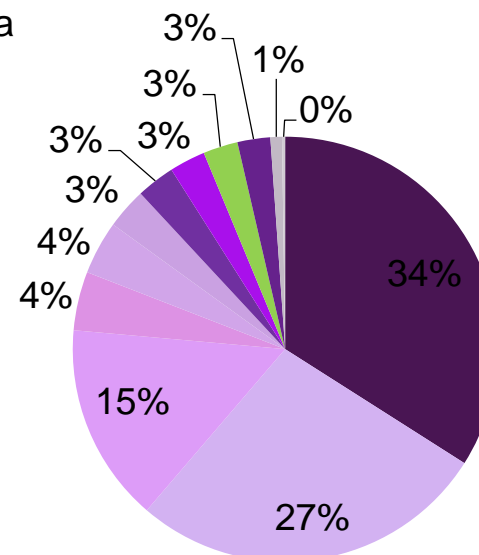
Europe-Emerging

Americas-Central

MEA-MidEast

Asia-SE Asia

2025



Europe-West

Asia-NE Asia

Americas-South

Oceania

Asia-S Asia

Americas-Caribbean

Europe-Emerging

Americas-Central

MEA-MidEast

Asia-SE Asia

Source: Tourism Economics



Market Selection Model

GDP (PPP)

GDP (PPP)
Growth
(2019/2017)

International
Travel
Expenditure

International
Departures

Unemployment
index

Civil Liberty

Population

Ease of Doing
Business

GINI (Wealth
distribution)

Geographic
Distance

Event-based
factors

2018 Market Prioritization

Fully Customized

China

India

**Specialized
Initiatives**

Korea

Brazil

Mexico

**Localized
Versions of
Global
Campaigns**

Canada

UK

France

Germany

Japan

Australia

**Foundational
Support**

Sweden

Chile

Colombia



2018



Cultural Breakthrough

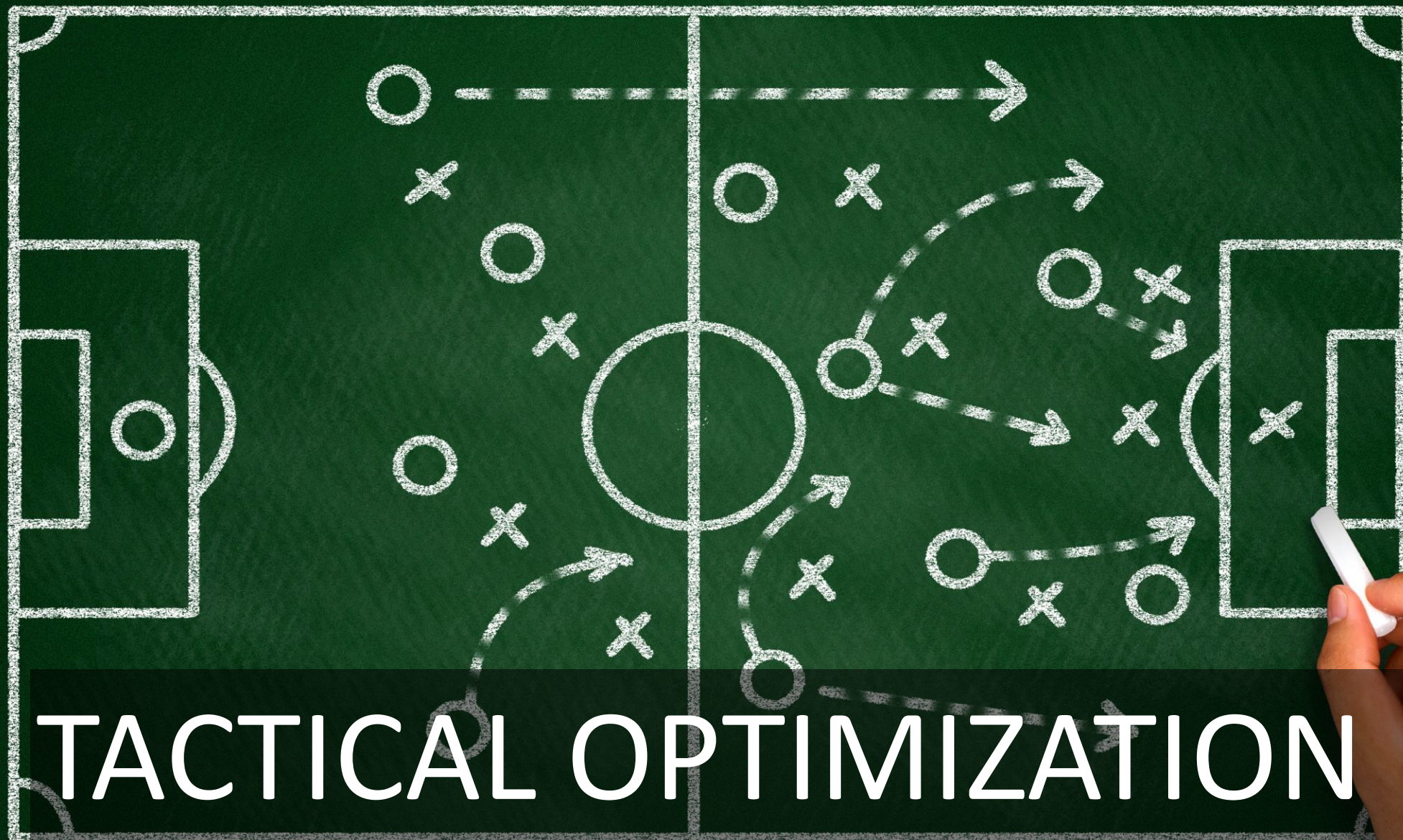




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The Power Of Music





TACTICAL OPTIMIZATION



REDUCE

REUSE

RECYCLE

FOR A

HAPPIER EARTH

+

**MARKETING
BUDGET**



LESS PRODUCTION



MORE MEDIA



COOPERATION versus COMPETITION



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Consumer

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Thank You!

