



# 2017 ARIZONA GOVERNOR'S CONFERENCE ON TOURISM

How to Engage with Brand USA:  
Setting the Foundation

Phoenix, AR  
July 20, 2017



Thank You, AOT!





# TRAVEL FUELS THE ECONOMY

USA  
VisitTheUSA.com

Brand USA

# Travel Powers the Economy and Enhances the Image of the USA

## #1 Services Export

- ✓ 78 million international visitors spent \$246 billion
- ✓ 35% of U.S. service exports - 11% of all U.S. exports

## 2.7% of GDP

- ✓ \$1.6 trillion in economic output
- ✓ \$141.5 billion in tax revenue

## 7.9 Million Jobs Supported by Travel

- ✓ 5.5 million direct; 2.4 million indirect
- ✓ Top 10 employer in 49 states and DC
- ✓ 1.1 million jobs supported by international travelers

## International Visitation Enhances the Image of the USA

- ✓ 74% more likely to have a favorable view of the USA
- ✓ 61% more likely to support U.S. policies



# Industry Defining Moments



# Contributions are Generated by Non-Taxpayer Funds

\$14



Traveler from one of 38 Visa Waiver Program countries registers to visit the USA



\$4

ESTA Program Expenses



\$10

Travel Promotion Fund



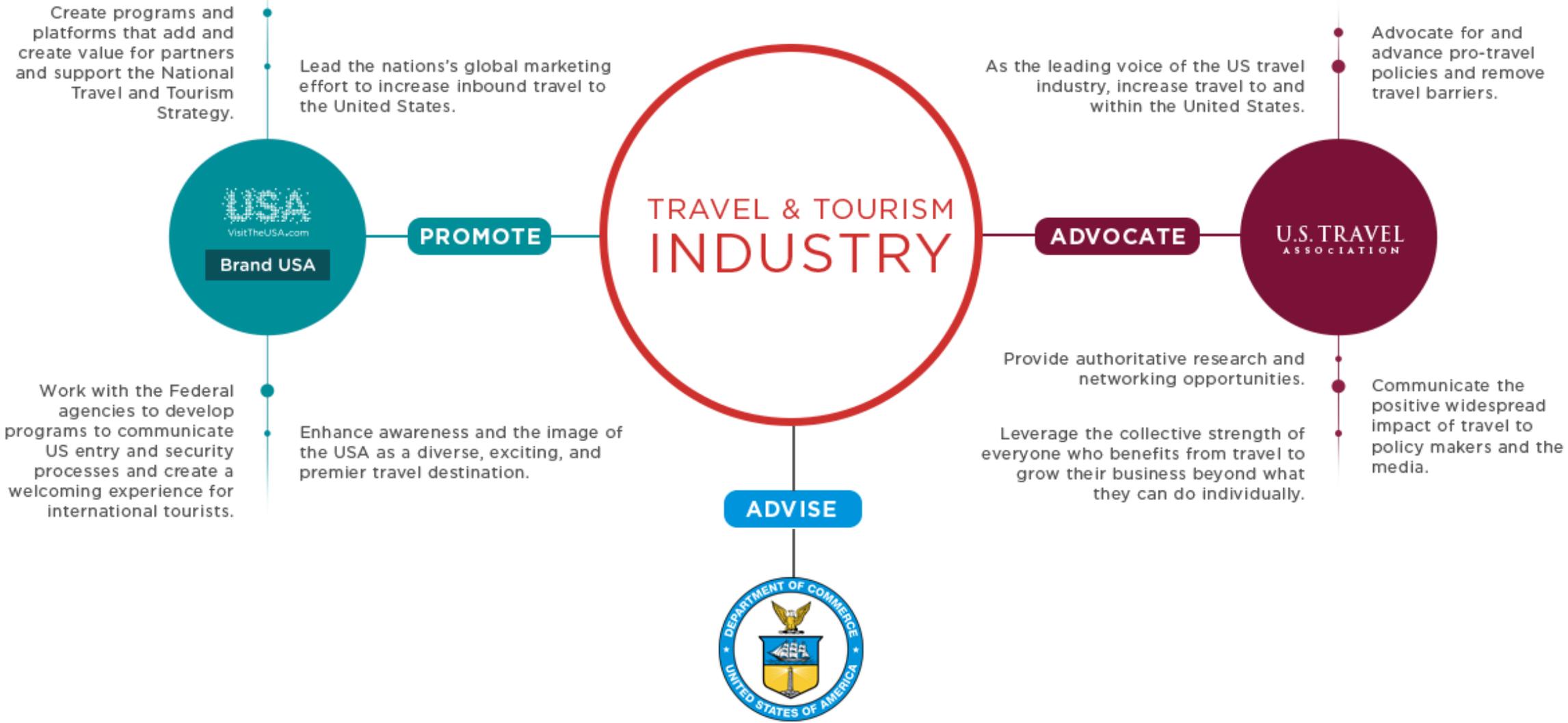
Up to \$200 Million in Funding

\$100 Million from Contributors



\$100 Million from the Travel Promotion Fund

# Leadership Roles in the Travel Industry to Increase International Travel to the USA



# The Destination Marketing Organization for the United States



- Created by the Travel Promotion Act in 2010
- The nation's first public-private partnership to promote travel to the USA
- More than 700 partners since 2011

## Mission:

Increase **international visitation, spend and market share** in order to **fuel the U.S. economy** and enhance the **image of the United States** worldwide.

## Vision:

Our vision is to be the **best in class national destination marketing organization** - earning the USA the largest share of the global travel market and significantly contributing to job creation, GDP, export growth and tax revenues.

# Statement of Purpose: Foundational Elements

**Maximize and optimize  
ROI of Brand USA  
resources**  
by deploying the right  
messages, through the right  
channels, in the right markets,  
at the right times and at the  
right investment levels

**Add and create value**  
by pioneering cooperative marketing  
platforms and programs that grow and  
leverage the USA brand in ways our  
Partners would be challenged  
or unable to do on their own

**Build and maintain trusted relationships with stakeholders worldwide**  
through inclusive, proactive and transparent outreach with a commitment to compliance and  
integrity through words, actions and results



**Promote the entirety  
of the USA**  
with innovative marketing that  
supports all 50 states, the District  
of Columbia and five territories to,  
through and beyond the gateways

**Inspire, inform welcome  
and thank travelers**  
while accurately communicating  
vital and compelling information  
about visa & entry policies

# The USA Campaign

Consumer marketing campaigns in 11 markets that generate more than 80% of inbound travel to the USA



- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- United Kingdom

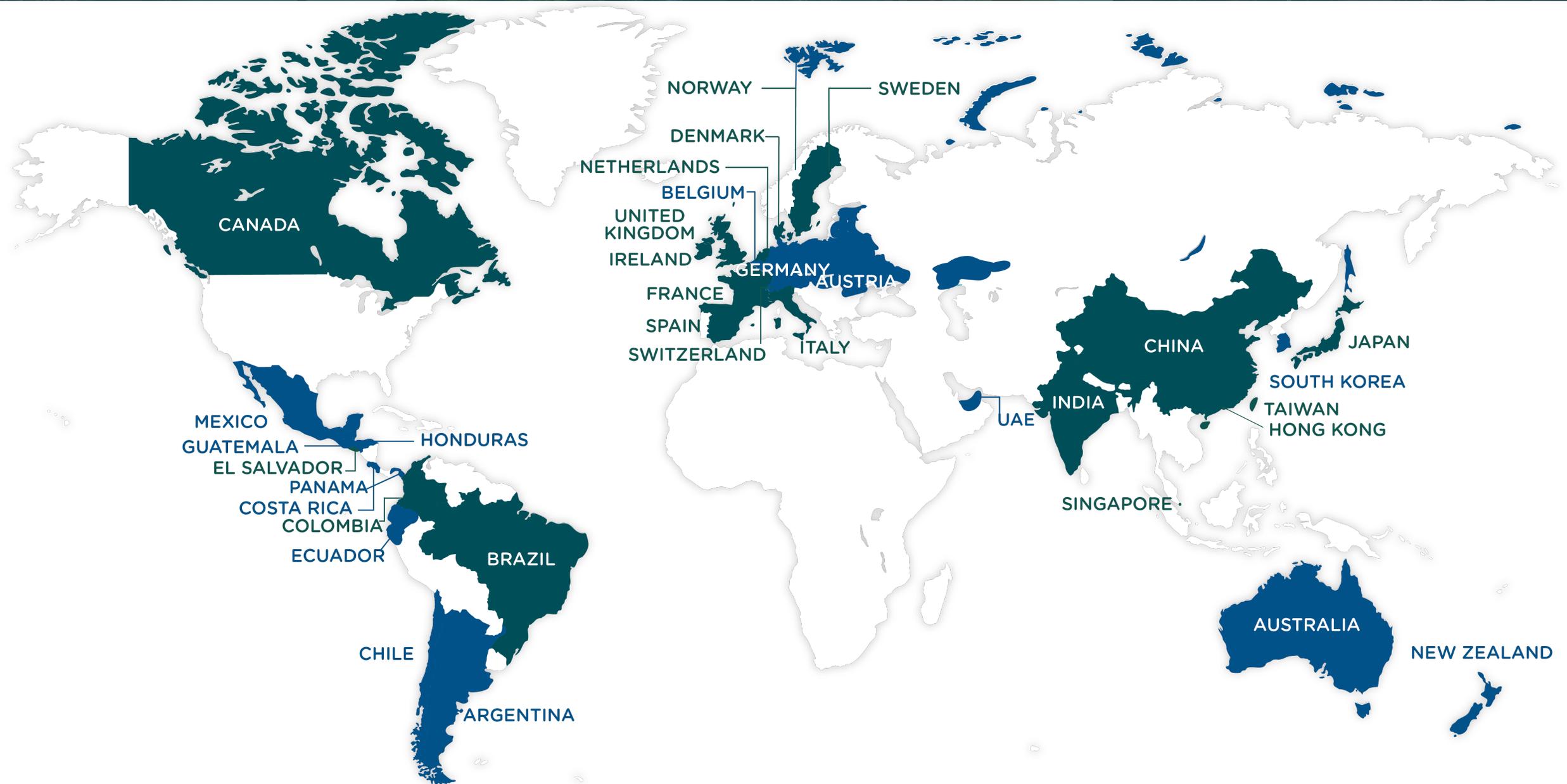
# International Offices: Travel Media & Trade Relationships in 20 Markets

- Canada
- Mexico & Central America
- Brazil
- UK & Ireland
- Germany, Austria & Switzerland
- India
- Australia & New Zealand
- China (4 offices)
- Hong Kong, Taiwan & Singapore
- Japan
- South Korea



# Marketing Initiatives in 36 markets:

Reaching more than 90% of inbound travel to the USA





# Over the past four years, Brand USA's marketing efforts have generated:

**4.3 million** incremental visitors **\$13.6 billion** in incremental spending

an average of **50,900** incremental jobs supported each year

federal, state, & local taxes nearly **\$4 billion**

**\$29.5 billion** in total economic impact

more than **700** partners since our founding

**98%** partner program retention rate in FY2016



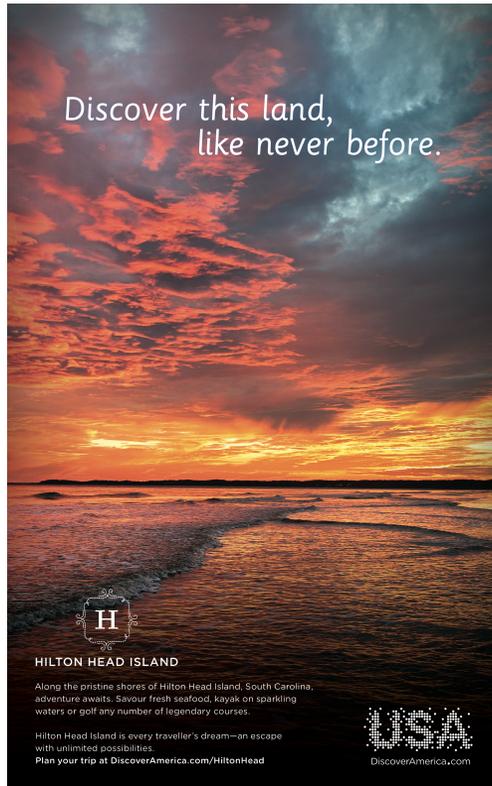
# FY 17-18 CONSUMER MARKETING



# CAMPAIGN HISTORY

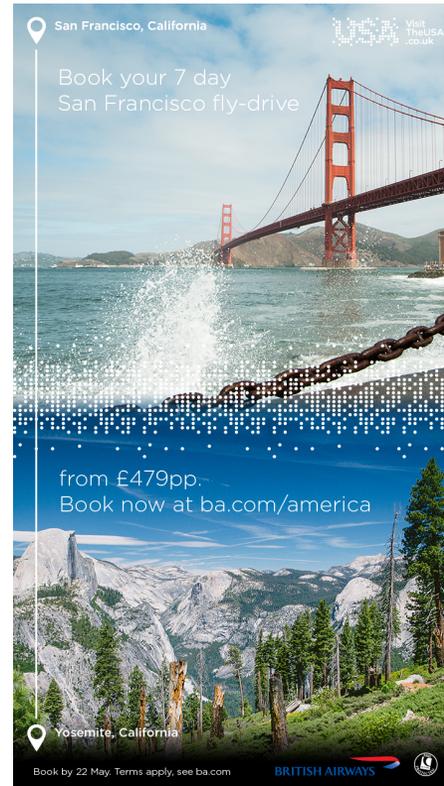
## 2012 – 2015

DISCOVER THIS  
LAND



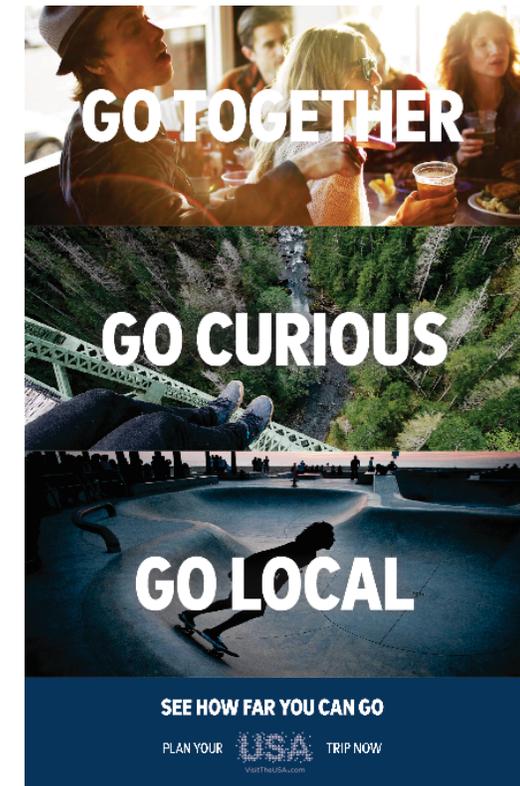
## 2015 - 2016

ALL WITHIN YOUR  
REACH



## 2017 -

SEE HOW FAR  
YOU CAN GO



\* FPO layout example - not final images or copy

# 2017 Strategy: The 3 Ps

*possibility*



Build on an ownable foundation

PERSONA



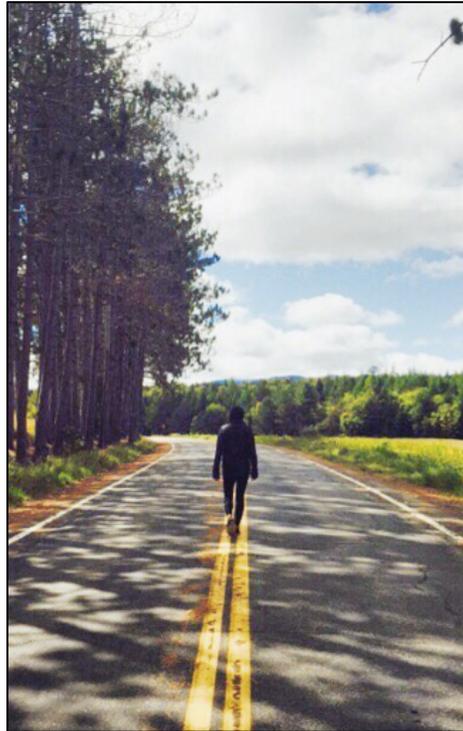
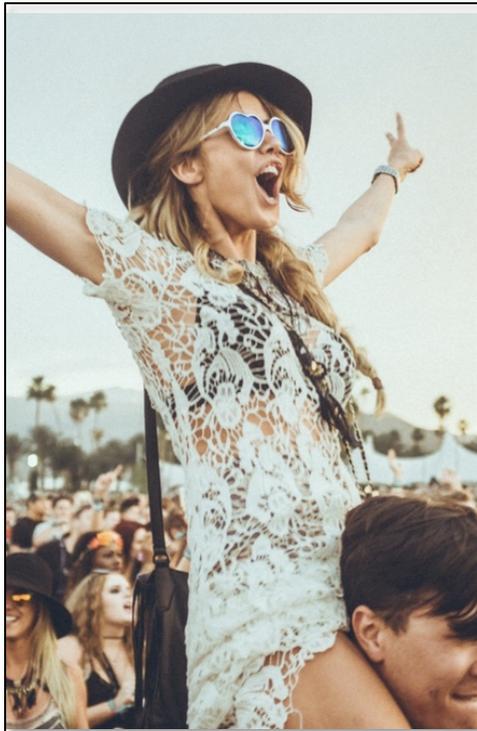
Create relevance by targeting mindsets and motivations



Make it real with travel itineraries and trip suggestions

# The Personas

- We've segmented our 16 markets into four main personas: Excitement **Bold**, Excitement *Light*, Local, and Escape
- The personas were derived from extensive market research analyzing the unique demographics, psychographics and lead trip motivations of our core travelers across each market



# Localized Across Markets and Platforms

Persona

Escape



Excitement



Local



Market



United Kingdom



Mexico



Australia



India



Canada



Brazil



Chile



Colombia



France



Germany



Japan



Sweden



South Korea



China



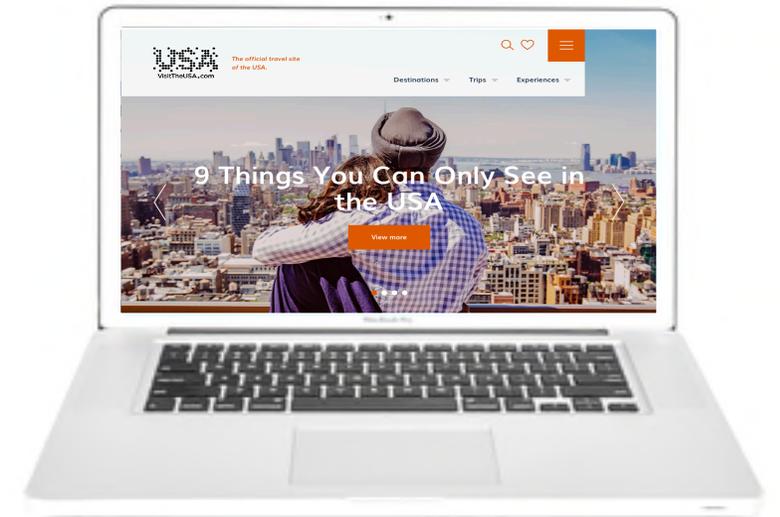




# VisitTheUSA.com - Evolution

The new consumer sites have cutting-edge functionality, immersive visuals and fresh content.

- Mobile Responsive
- Modular
- Geo-targeted
- Personalized
- Streamlined Navigation
- Integrated Maps
- Bookmark-able
- Shareable





VisitTheUSA.com

*The official travel site  
of the USA.*



Map

Destinations ▼

Trips ▼

Experiences ▼

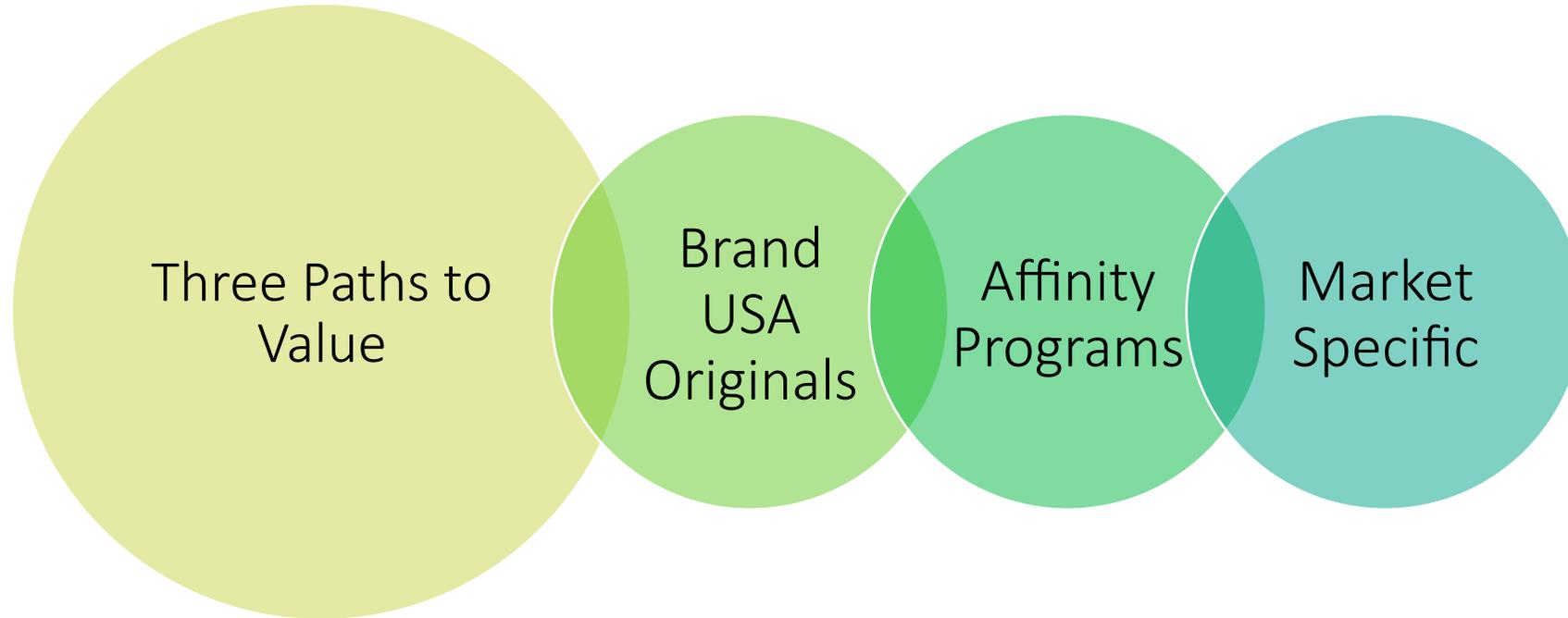
# Meet The New VisitTheUSA.Com



# ENGAGING WITH BRAND USA: SETTING YOUR FOUNDATION



# Three Paths to Value



# BRAND USA PROGRAMS BY COUNTRY

VisitTheUSA.com + GoUSA.cn Global Inspiration Guide Video Distribution Road Trip Content Multi-Channel Affinity Programs									
Attractions & Experiences Co-op  BBC  Facebook  Culinary Initiative  Influencer Program  International SEM  National Geographic Digital Co-op  STA Travel  TravMedia  USA Discovery Program  Travelzoo  NewsCorp  Sunrise/ Flight Centre	Attractions & Experiences Co-op  BBC  Facebook  Culinary Initiative  International SEM  National Geographic Digital Co-op  USA Discovery Program  Decolar	Attractions & Experiences Co-op  BBC  Facebook  Culinary Initiative  Digital Magazine  International SEM  National Geographic Digital Co-op  TravMedia  Travelzoo  Dreamscapes  Postmedia  Travel Nation/Rogers Media	Attractions & Experiences Co-op  National Geographic Digital Co-op  Thomas Cook  TravMedia  USA Discovery Program  <i>Essentially America</i>  Ctrip  GoUSA Social Campaigns  Fliggy  Mafwengo  WeChat/ Weibo	BBC  Culinary Initiative  STA Travel  Thomas Cook  Travelzoo	Attractions & Experiences Co-op  BBC  Culinary Initiative  Influencer Program  International SEM  National Geographic Digital Co-op  STA Travel  Thomas Cook  TravMedia  USA Discovery Program  <i>Essentially America</i>  Travelzoo  Air Berlin  Dertour  <i>FVW Medien</i>	BBC  Facebook  Culinary Initiative  National Geographic Digital Co-op  USA Discovery Program  <i>Hindustan Times</i>  <i>Times of India</i>  Hot Star  Star TV	BBC  Facebook  Culinary Initiative  National Geographic Digital Co-op  STA Travel	Attractions & Experiences Co-op  BBC  Facebook  Culinary Initiative  International SEM  National Geographic Digital Co-op  USA Discovery Program  <i>Essentially America</i>  Despegar  Televisa	Attractions & Experiences Co-op  Facebook  Culinary Initiative  Digital Magazine  Influencer Program  International SEM  National Geographic Digital Co-op  STA Travel  Thomas Cook  TravMedia  USA Discovery Program  <i>Essentially America</i>  Travelzoo  RHS Hampton Court Flower Show  <i>The Telegraph</i>  <i>Times UK</i>  WTM Taxis

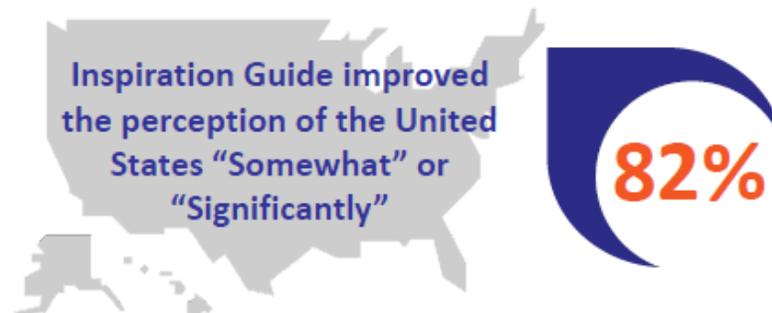


# Brand USA Originals: Inspiration Guide

## 2018 Guide:

- 575,000 printed copies
- 30MM digital impressions
- 14 language editions distributed in 21 countries
- “Top of Funnel” Guide to inspire travel to the US – core and emerging markets
- 2018 and beyond – more digital distribution of content
- Relevant consumer brand campaign fulfillment
- Themed editorial i.e. Road Trips, Photo Essays, Travel Spotlights

Positioning the United States (% of all respondents)



# Brand USA Originals: Multi-Channels

## New Media Platforms & Program Evolution

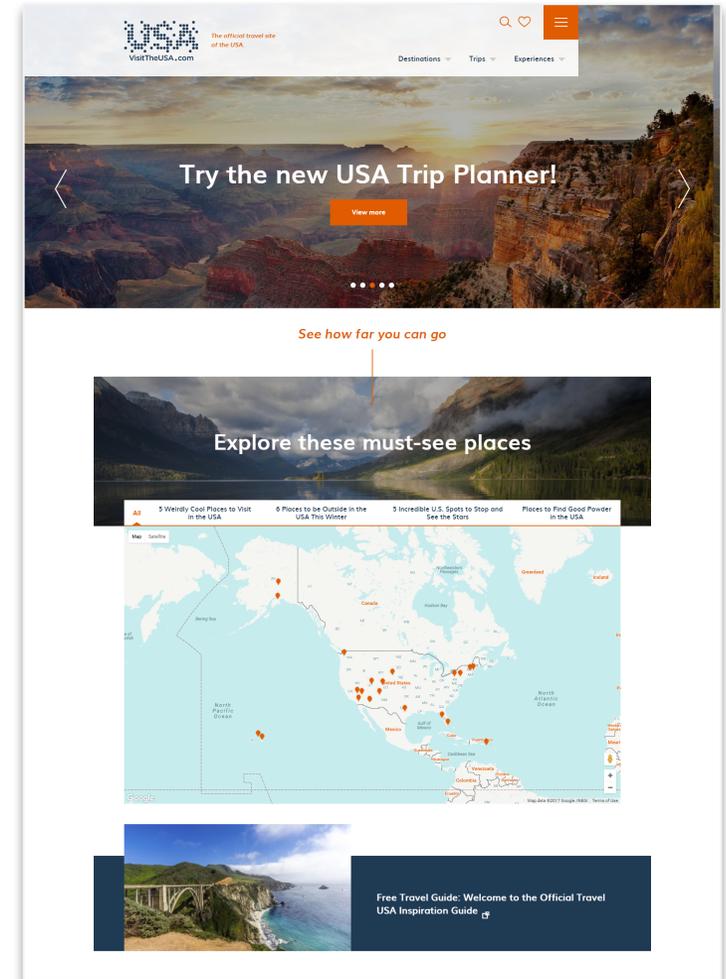
- Shift marketing channels from awareness/ high funnel to engagement/activation/mid to lower funnel
- Greater investment in digital to support “social first” strategy, and provide opportunities for storytelling
  - 60% of Brand USA investment toward digital channels
- Primary Digital Channels
  - Facebook Ad Carousels (NEW)
  - Video – broadcast and digital (NEW)
  - Google Display Network
  - Expedia

2018 TARGET MULTI-CHANNEL MARKETS



# Visit the USA Global Sites

- Destination Pages: State
  - Hero photo/video gallery, Google Map integration, Must-See module, official links, Where to Next module
- Destination Pages: City
  - Hero photo/video gallery, Google Map integration, TripAdvisor “Things to Do” feed, official links
- Experience Pages
  - Designed to highlight destination-specific experiences, tagged to populate in interest based searches, include photo/video gallery, partner links, locator map
- Trips Pages
  - Regional or Statewide, trip stops content, locator map
- Thematic Content Verticals
  - Additional themed offerings with original content creation and marketing expansion. Details vary per program, themes include: Culinary, Outdoors, Entertainment and more





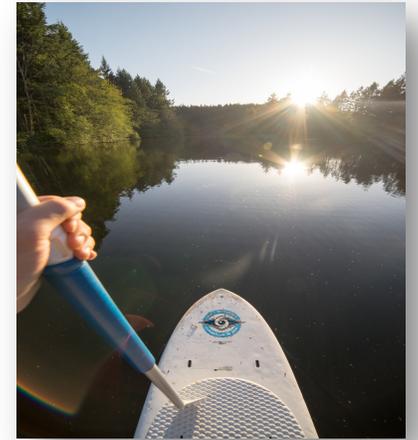
**CONTENT:  
WE NEED MORE!**

**USA**  
VisitTheUSA.com

**Brand USA**

# Provide Editorial Content

- Participate in the partner thematic content
- Send us images/video for our DAM
- Send story ideas or events
- Email [socialmedia@thebrandusa.com](mailto:socialmedia@thebrandusa.com)



**IPW 2017 – WASHINGTON, DC**



# **One Big Welcome**

# One Big Welcome!

The idea behind “One Big Welcome” is to extend a warm and authentic invitation to visit the USA using real people to tell unscripted stories of their favorite places.

Using a documentary approach, we’re creating welcome messages that feel genuine and showcase the range of interconnected experiences in the USA.







**NEXT STEPS**

**USA**  
VisitTheUSA.com

**Brand USA**

# To Do List

- **Get on board!:**

- Partner with local CVB/COC
- Participate in AOT State-led co-op
  - Content on VisitTheUSA sites – Upgrade City and/or Experience Pages
  - Multi-Channel Programs
  - 2018 Inspiration Guide
- Freebies
  - One Big Welcome: <http://www.thebrandusa.com/one-big-welcome>
  - Send us your Content: Email [socialmedia@thebrandusa.com](mailto:socialmedia@thebrandusa.com)



**Like/Follow/Share**

**Travel Industry**

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**BrandUSATV**



**BrandUSA**

**Consumer**

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# Thank You!

