

USA

VisitTheUSA.com

Brand USA

TENNESSEE GOVERNOR'S CONFERENCE

Brand USA's
International Marketing
Strategy and Insights

October 5, 2017





SMOKY MOUNTAIN
STRONG!

2017 TENNESSEE GOVERNOR'S CONFERENCE
ON HOSPITALITY & TOURISM

GATLINBURG

Celebrating the Spirit of
Our People and Our Industry



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



The Path to Create Brand USA Wasn't an Easy One: It Took a Lost Decade

 **37%**

The United States' share of international arrivals dropped 37%
(from 17% in 2000 to 12% in 2010)

 **60
Million**

Between 2000 and 2010, global travel grew by more than 60 million travelers annually
(yet international visitation to the USA was flat)

The cost of the United States' loss of global market share?

78 million lost visitors
\$606 billion lost spending
\$37 billion lost tax revenue
467,000 lost jobs

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.

The Role of Brand USA



USA

VisitTheUSA.com

Brand USA

PROMOTE



TRAVEL &
TOURISM
INDUSTRY



U.S. TRAVEL
ASSOCIATION

ADVOCATE

National Travel & Tourism Office



POLICY & COMPETITIVENESS

Statement of Purpose: Our Strategic Foundation

Drive Results

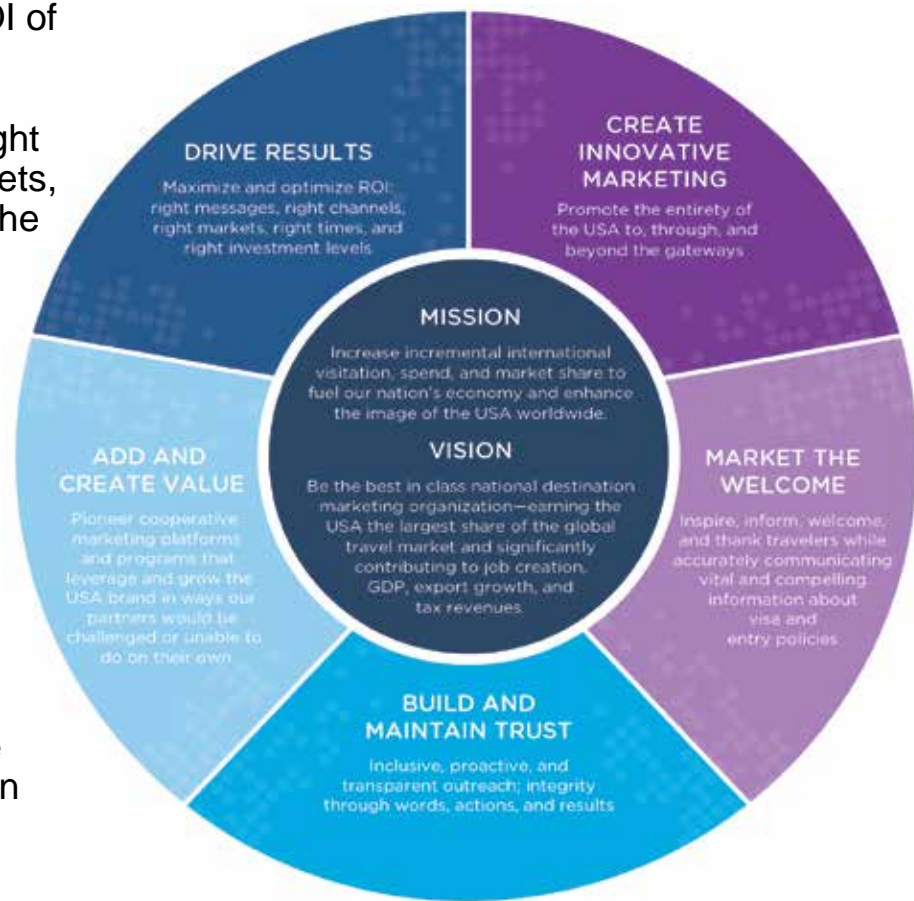
Maximize and optimize ROI of Brand USA resources by deploying the right messages, through the right channels, in the right markets, at the right times, and at the right investment levels

Create Innovative Marketing

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

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



Market the Welcome

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

Build and Maintain Trust

through inclusive, proactive, and transparent outreach with a commitment to compliance and integrity through words, actions, and results

Over the past four years, Brand USA's marketing efforts with its partners 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

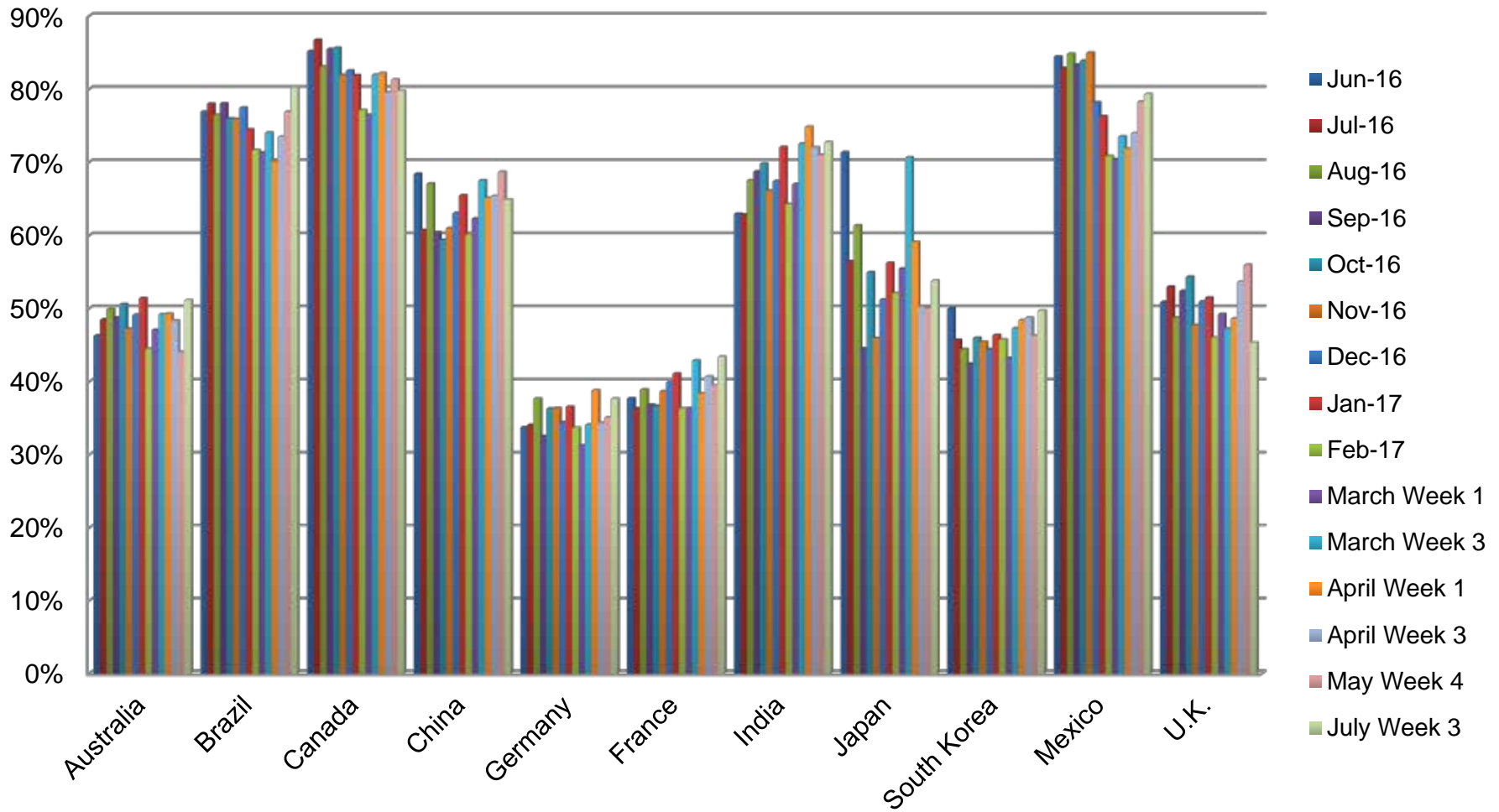
\$29.5 billion
in total economic impact

In partnership with

more than
700
partners since our founding

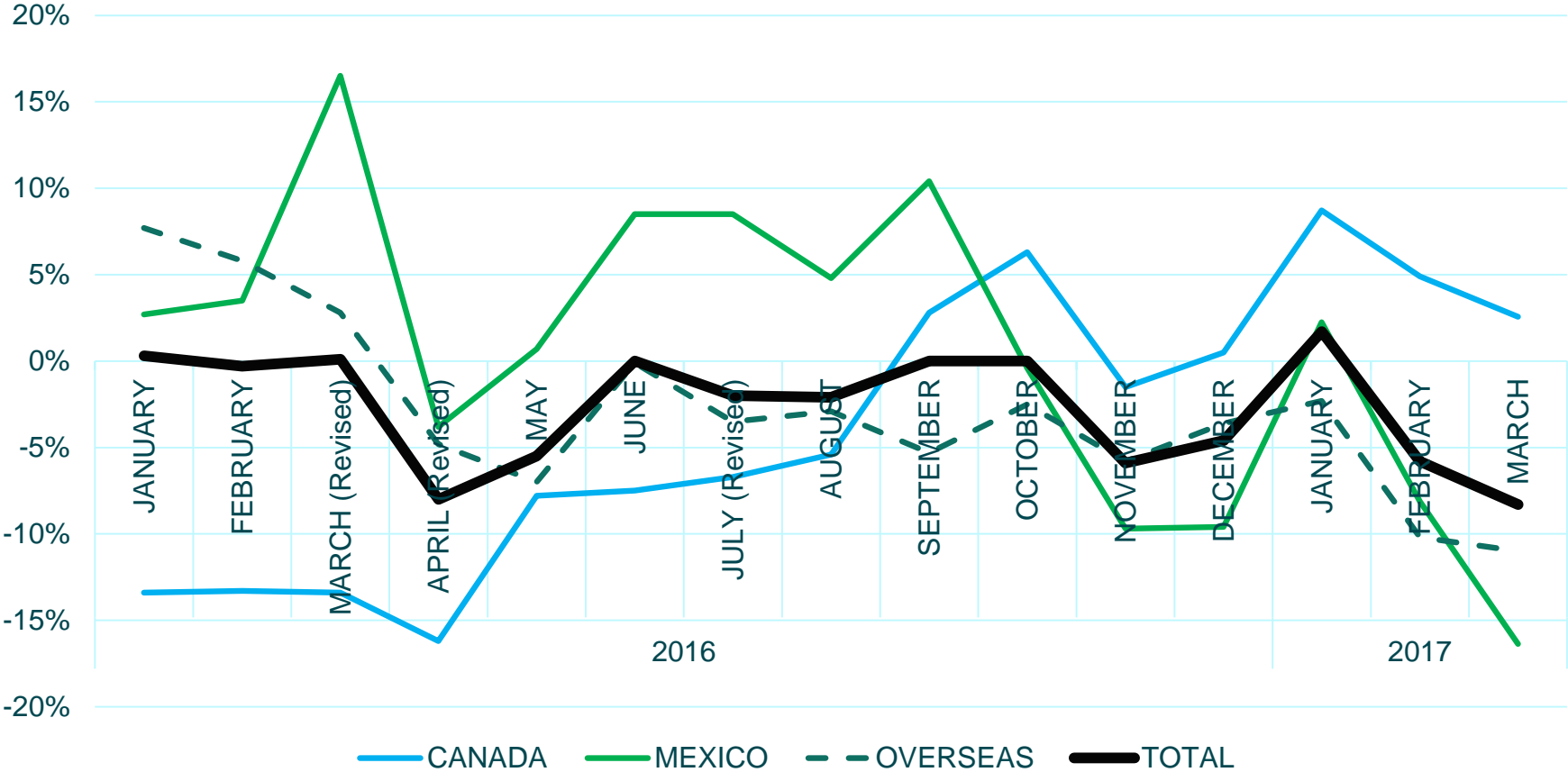
98% partner program
retention rate
in FY2016

Likelihood to Visit in the Next 2 Years



Source: ORC custom study

2016 USA Arrivals Growth



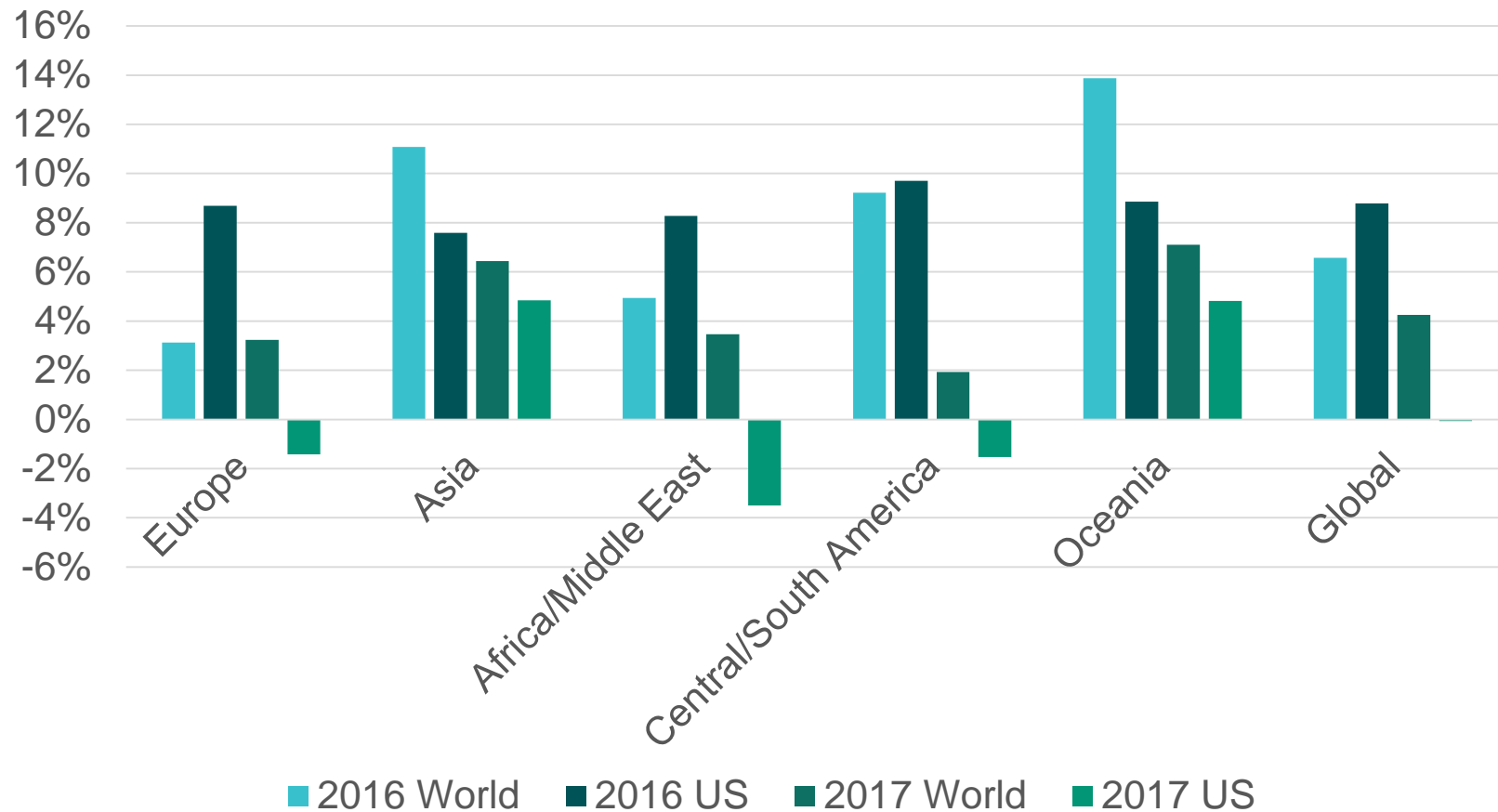
Source: NTT

YoY Change in Currency Exchange Rates (2017 through July)

Year	USD/ CAD	USD/ Euro	USD/ MXN	USD/ GBP	USD/ BRL	USD/ INR	USD/ CNY	USD/ JPY	USD/ KRW	USD/ AUD
2015/ 2014	15.7%	19.5%	19.3%	7.8%	41.6%	5.2%	1.2%	14.4%	7.5%	19.9%
2016/ 2015	3.7%	0.4%	17.7%	13.1%	4.9%	4.8%	6.8%	-10.3%	2.4%	1.1%
2017/ 2016	0.6%	1.8%	2.8%	7.1%	-8.6%	-2.4%	3.4%	3.5%	-1.8%	-1.6%

Source: OANDA

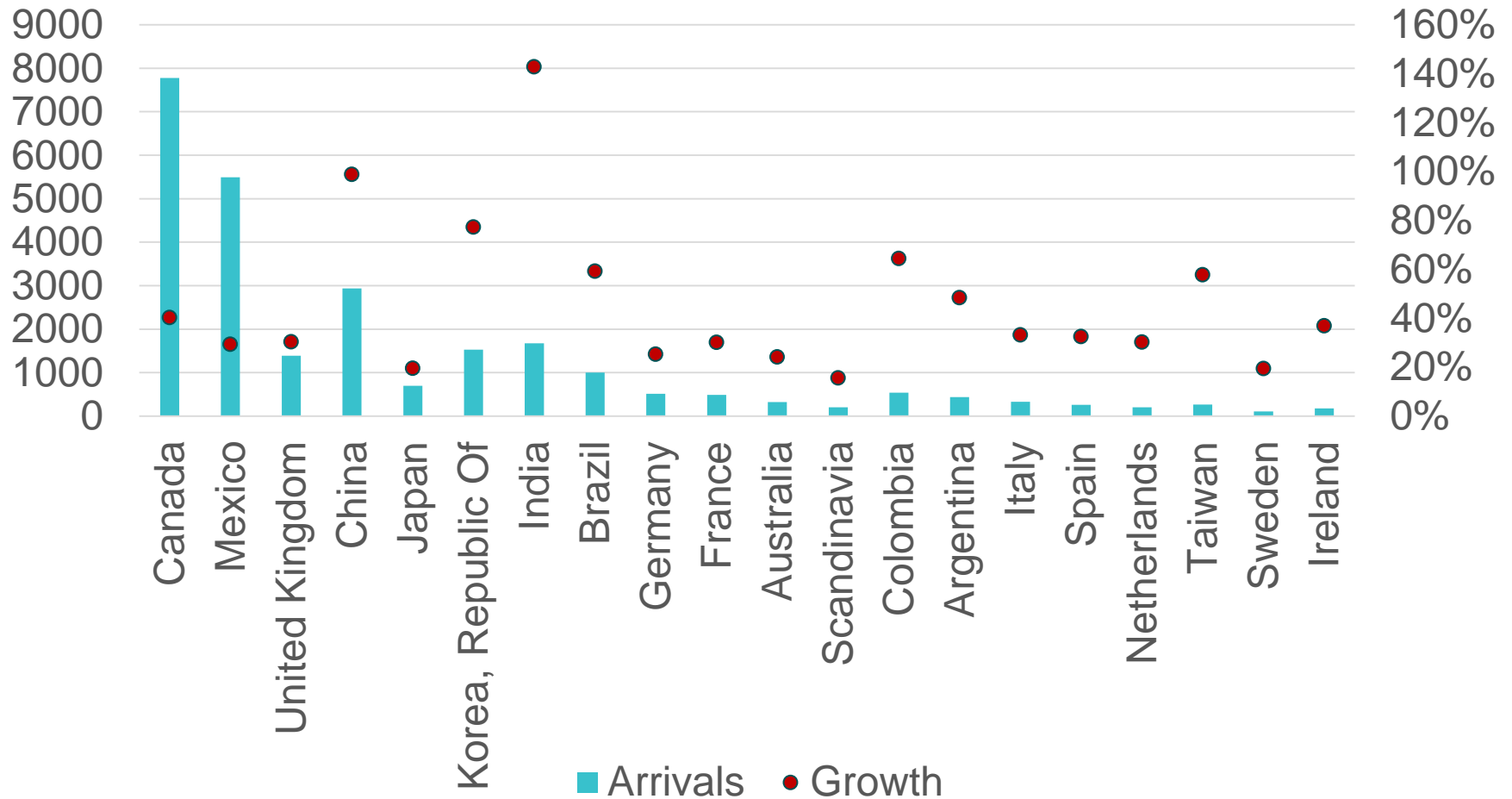
Long Haul Outbound to US and World (Jan-Jun) YoY Growth



Source: Sabre Market Intelligence

2025 vs. 2016 Arrivals

Amounts in 000s



HOW WE'RE MARKETING THE USA

USA

VisitTheUSA.com

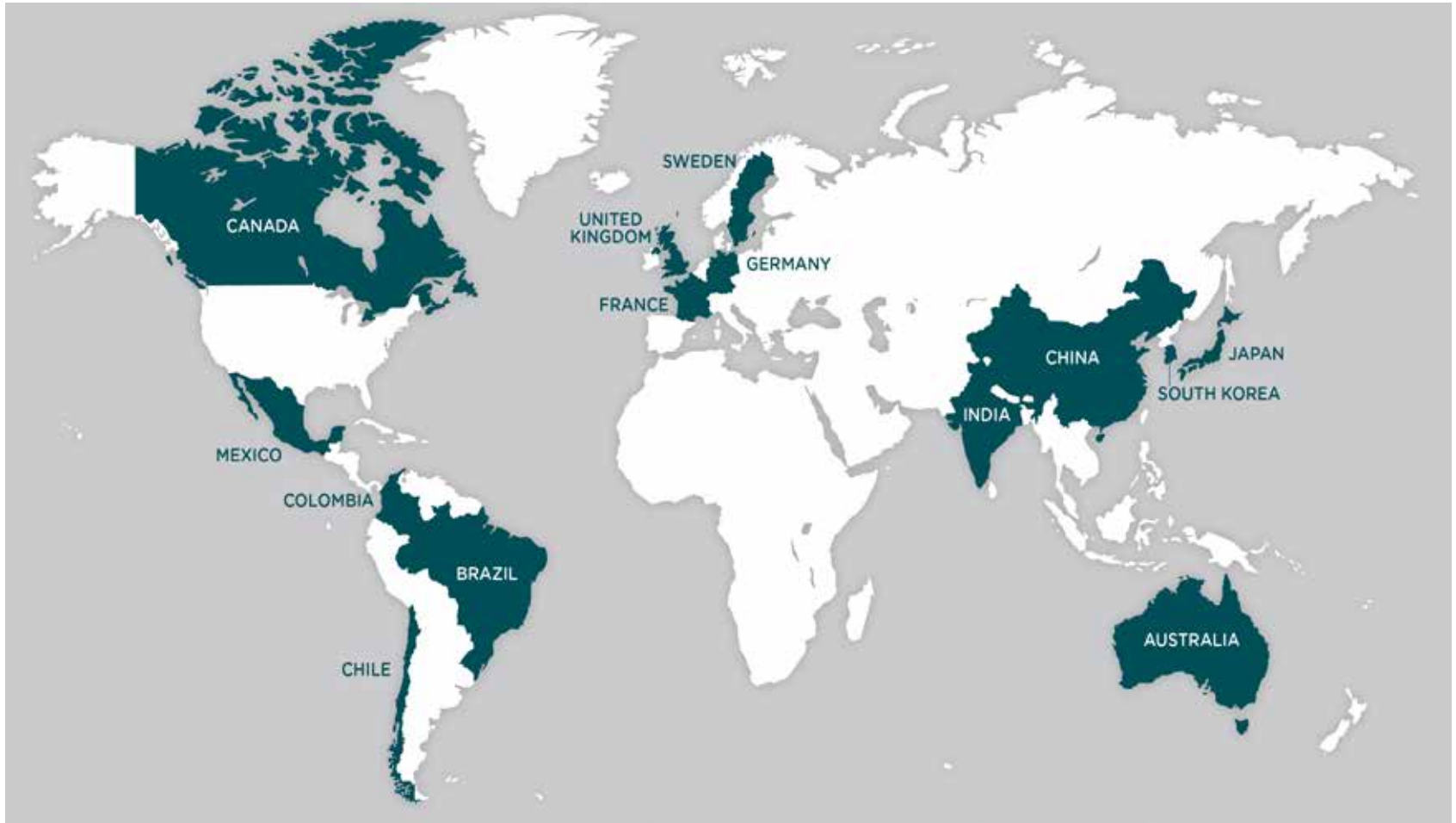
Brand USA

Our Marketing / Planning Approach

MARKETING POSITIONING	<p>The diversity of the USA is exciting and uniquely ours to own in a way that is magnetic and uniquely “yours” to discover. Here you can travel freely throughout the country to explore genuine and authentic opportunities that truly speak to who you are.</p> <p>The collection of these experiences become your own unique story that we invite you to share with friends and family.</p> <p>There’s an American story for everyone just waiting to be created.</p> <p>Welcome to the USA.</p>				
FY2018 CORE PLATFORM	Music				
FY2018 COMPLEMENTARY PLATFORMS	<p>Great Outdoors</p> <p>Neighborhoods, Cities, and Towns</p> <p>Arts and Culture</p> <p>Road Trips</p>				
MESSAGE FOUNDATION	Possibility (Promise)	Proximity (Value Proposition)	Welcoming (Tone)		
PLANING APPROACH	Integration, Authenticity, ROI				
PLANNING TOOLS	Research & Analytics Content and Marketing Calendar				
MARKETING SEGMENTS	CONSUMER MARKETING	PUBLIC RELATIONS	GLOBAL TRADE	COOPERATIVE MARKETING	CORPORATE COMMUNICATIONS
	Consumer-driven	Consumer- and Trade-driven	Trade-driven	Partner-value, consumer-focused	Stakeholder-driven
MARKETING INTEGRATION	Storytelling, Educating, Sharing				
OPERATIONAL DRIVER	Efficiency, Effectiveness, Compliance				

The USA Campaigns

Consumer marketing campaigns in 14 markets that generate more than 80% of inbound travel to the USA



- Australia
- Brazil
- Canada
- Brazil
- Chile
- China
- Colombia
- France
- Germany
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

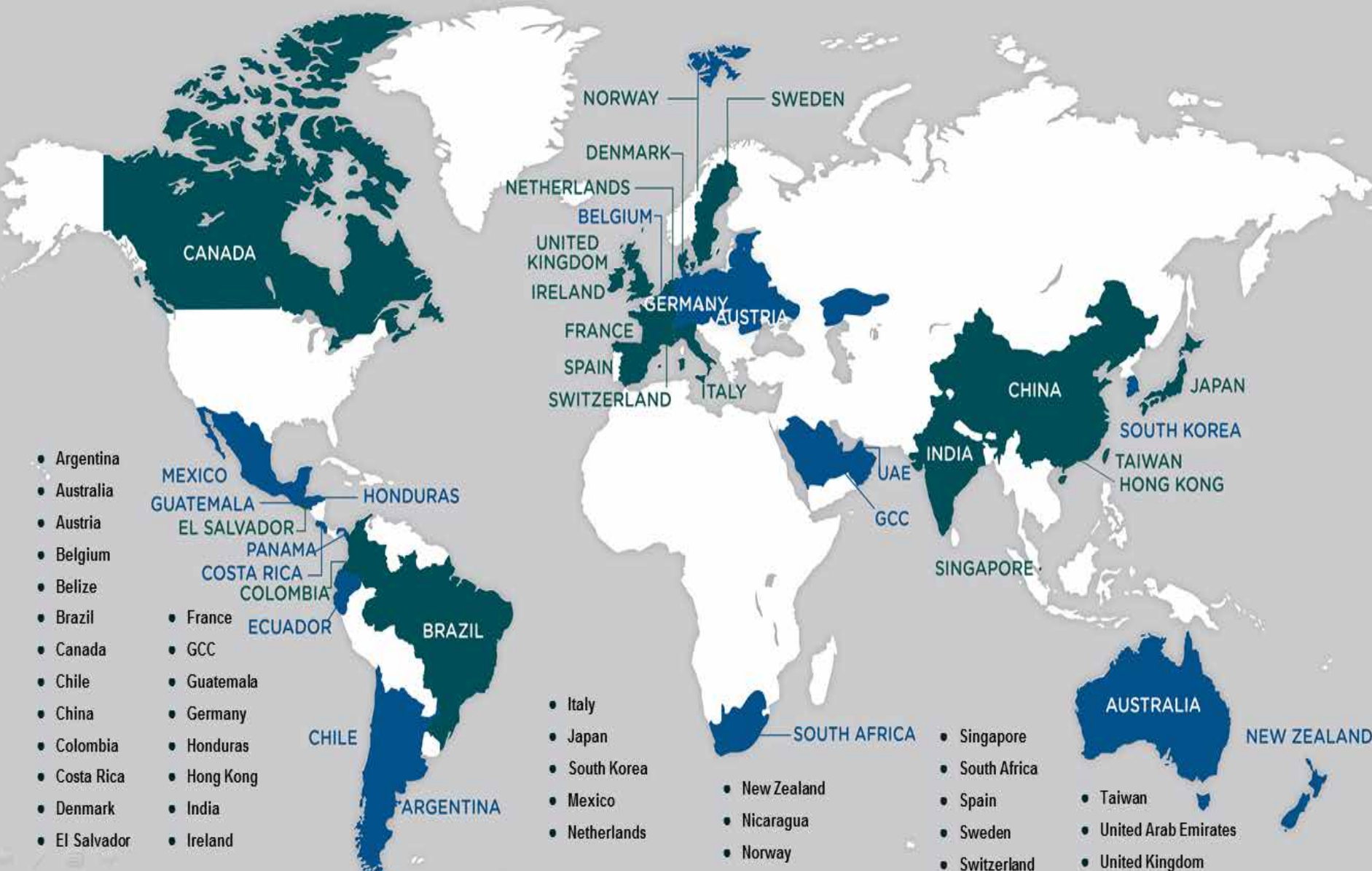
International Offices: Travel Media & Trade Relationships in 20 Markets



- 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 over 40 markets:

Reaching more than 90% of inbound travel to the USA



- Argentina
- Australia
- Austria
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- El Salvador

- France
- GCC
- Guatemala
- Germany
- Honduras
- Hong Kong
- India
- Ireland

- Italy
- Japan
- South Korea
- Mexico
- Netherlands

- New Zealand
- Nicaragua
- Norway

- Singapore
- South Africa
- Spain
- Sweden
- Switzerland

- Taiwan
- United Arab Emirates
- United Kingdom

Visit the USA: Tennessee

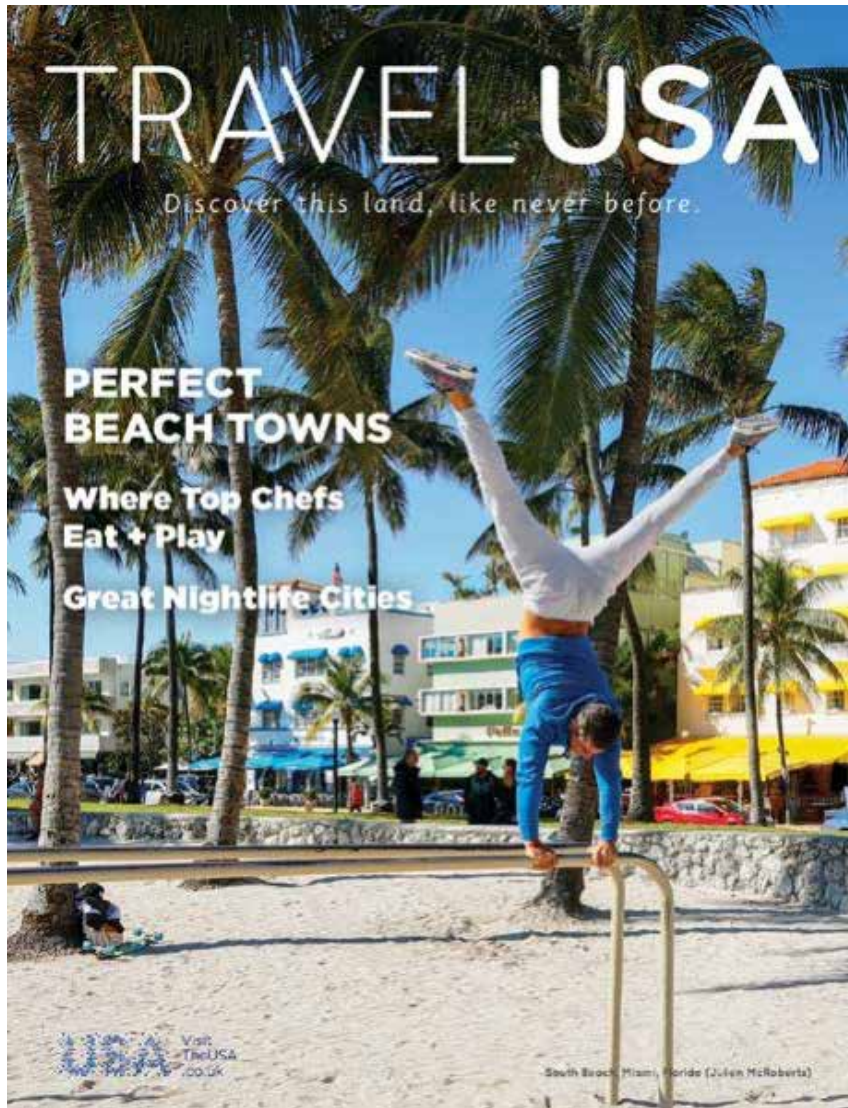
The screenshot shows the VisitTheUSA.com website with a featured article for Tennessee. The article title is "Tennessee" and the subtitle is "Sunrise on a fall morning at a dock on the Tennessee River". The main image is a scenic view of a wooden dock extending into a river at sunrise. A navigation menu at the top includes "Destinations", "Trips", and "Experiences". A search bar and a "Map" button are also visible. A small map of the United States is shown in the bottom left corner, highlighting Tennessee. Below the main image, there is a "1 of 8" indicator and a row of eight small thumbnail images representing different experiences in Tennessee.

The screenshot shows the VisitTheUSA.com website with a featured article for Tennessee. The article title is "Experience Tennessee" and the subtitle is "Sunrise on a fall morning at a dock on the Tennessee River". The main image is a scenic view of a wooden dock extending into a river at sunrise. A navigation menu at the top includes "Destinations", "Trips", "Experiences", "Search", "Heart", "Menu", and "Map". A search bar and a "Map" button are also visible. A small map of the United States is shown in the bottom left corner, highlighting Tennessee. Below the main image, there is a "1 of 8" indicator and a row of eight small thumbnail images representing different experiences in Tennessee.

The screenshot shows the VisitTheUSA.com website with a featured article for Tennessee. The article title is "Fall for Waterfalls in Tennessee" and the subtitle is "By: Miriam B. Weiner". The main image is a scenic view of a waterfall cascading down a rocky cliff. A navigation menu at the top includes "Destinations", "Trips", and "Experiences". A search bar and a "Map" button are also visible. A small map of the United States is shown in the bottom left corner, highlighting Tennessee. Below the main image, there is a "View all states" button and a row of eight small thumbnail images representing different experiences in Tennessee.

Known in the United States for its music, mountains and mouthwatering barbecue, Tennessee has a lot to offer.

Inspiration Guide (UK)



TRAVEL USA
Discover this land, like never before.

PERFECT BEACH TOWNS
Where Top Chefs Eat + Play
Great Nightlife Cities

Visit The USA too UK

South Beach, Miami, Florida (Julien McRobert)



THE SOUNDTRACK OF AMERICA

Whether in exciting urban hubs or charming small towns, Tennessee offers authentic American experiences.

Tennessee's beauty is unparalleled, especially in the USA's most visited national park, Great Smoky Mountains, and the scenic rivers that sculpt the landscape. Its creative spirit is infused into every sip of Jack Daniel's oak-barrel-aged amber gold and every bite of Memphis barbecue. In Nashville, 'hot chicken' is on menus everywhere, and throughout the state food festivals are plentiful.

When it comes to music, Tennessee brings the foot-tapping, soul-saving kind - the Blues, Bluegrass, Country, Rock 'n' Roll, and everything in-between.

Pay homage to Elvis at Graceland in Memphis and channel the Blues on Memphis' iconic Beale Street. Celebrate Country music at Nashville's Country Music Hall of Fame and Museum, and at the Grand Ole Opry.

Discover Tennessee's heritage in the Great Smoky Arts and Crafts Community in Gatlinburg, at Stones River National Battlefield in Murfreesboro, and Shiloh's National Military Park. More iconic attractions include Rock City and Ruby Falls in Chattanooga, Memphis' National Civil Rights Museum and Titanic Pigeon Forge.

Start making memories at Invacation.com

THE SOUNDTRACK OF AMERICA
MADE IN
TENNESSEE

Inspiration Guide (Germany)



TRAVEL USA

7 UNTERHALTSAME STRANDORTE

Kulinarische Ausflüge

NEUE Attraktionen in den USA

USA Visit TheUSA.de
Lake Tahoe, California (© iStockphoto.com)



DER SOUNDTRACK FÜR AMERIKA

**Pulsierende Ballungszentren und charmante Kleinstädte:
Tennessee ist durch und durch authentisch.**

Die einmalig schöne Natur des Bundesstaats beeindruckt nicht nur mit malerischen Flüssen, sondern vor allem mit den Great Smoky Mountains, dem meistbesuchten Nationalpark der USA. Der Erfindungsreichtum der Einheimischen spricht aus jedem bernsteinfarbenen Schluck des im Eichenfass gealterten Jack Daniel's Whiskey und jedem saftigen Bissen Barbecue nach Memphis-Art. In Nashville darf die Spezialität „Hot Chicken“ auf keiner Speisekarte fehlen und überall im Bundesstaat werden zahlreiche Gastronomiefestivals gefeiert.

Das musikalische Spektrum Tennessee's reicht von Blues und Bluegrass über Country bis hin zu Rock 'n' Roll und verbindet mitreißende Rhythmen und große Gefühle.

Neben Elvis Presleys Graceland beherbergt Memphis mit der legendären Beale Street auch die offizielle „Heimat des Blues“. In Nashville dreht sich dagegen mit der Country Music Hall of Fame & Museum und der Grand Ole Opry alles um die Country-Musik.

Im Shiloh National Military Park und dem Fort Loudoun Historic Park in Vondore ist die turbulente Vergangenheit des Bundesstaats noch lebendig. Andere bekannte Sehenswürdigkeiten sind die Rock City Gardens und die Ruby Falls in Chattanooga, das National Civil Rights Museum in Memphis und das Titanic-Museum in Pigeon Forge.

Weitere Tipps und Anregungen findet
Ihr unter TNVacation.com.



Multi-channel: Online

DOLEOP

THE SOUNDTRACK OF AMERICA
MADE IN
TENNESSEE

INVACATION.COM

EXPERIENCE THE SOUNDTRACK OF AMERICA. MADE IN TENNESSEE.

SEE DEALS

USA
VisitTheUSA.co.uk



Visit The USA

March 21 · 🌐

See a new side of the USA with a trip to these exciting destinations.



[Learn More](#)



Enjoy Great Music & Dancing in Tennessee
Where To Go Now

[Learn More](#)



Save On Flight With Expedia
Start Planning I



Like



Comment



Share

👍❤️😱 675

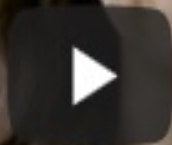
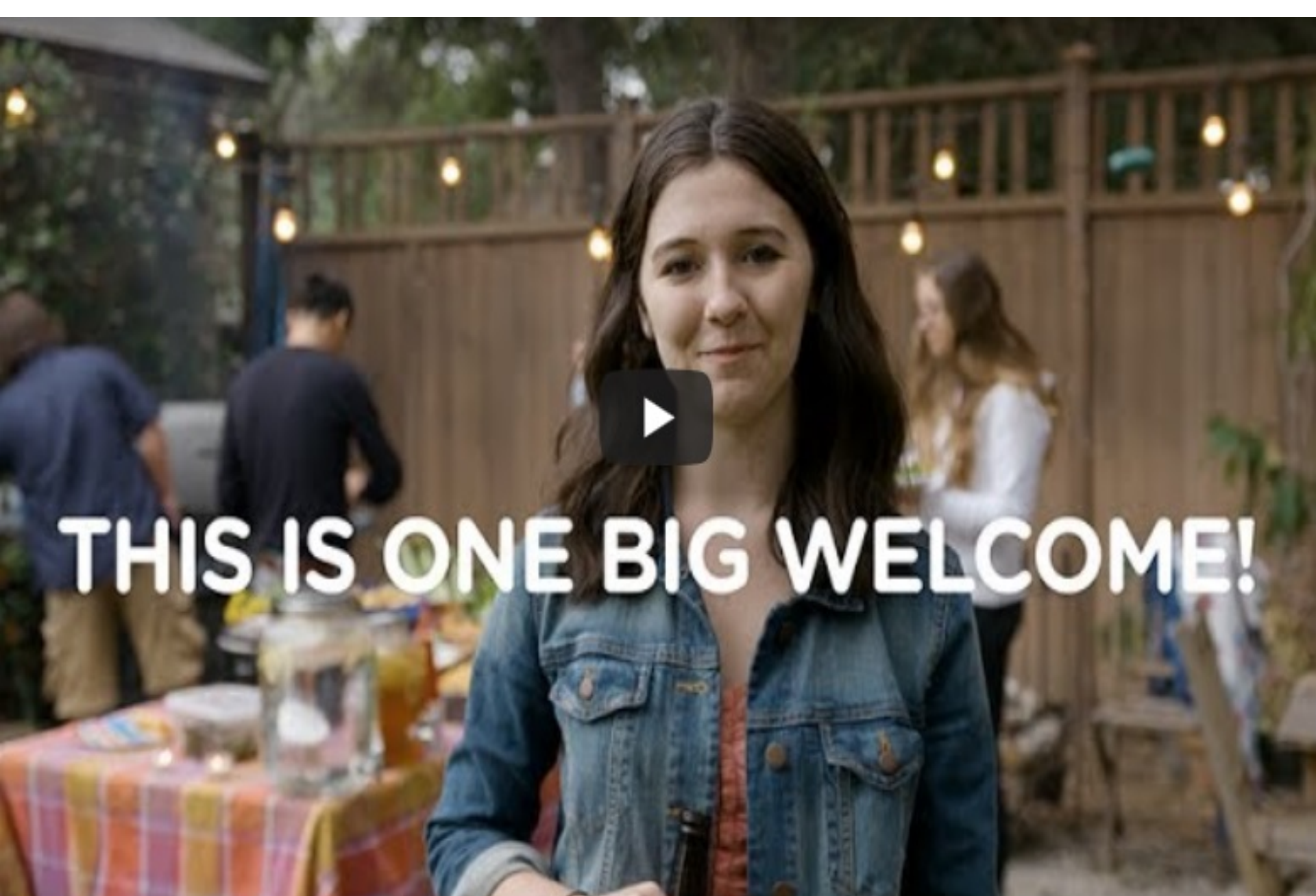
Top Comments ▾

29 shares

50 Comments



TAKE ME
HOME



THIS IS ONE BIG WELCOME!

A nighttime photograph of Washington, D.C. featuring the Washington Monument, the Lincoln Memorial, and the U.S. Capitol building. The sky is filled with large, colorful fireworks in red, white, and blue. The Lincoln Memorial is brightly lit in the foreground, and the city lights are visible in the background.

AMERICA'S TREASURES

USA

VisitTheUSA.com

Brand USA

MacGillivray Freeman's

NATIONAL PARKS ADVENTURE

NARRATED BY ROBERT REDFORD

MACGILLIVRAY
FREEMAN
FILMS

Expedia

SUBARU

Visit
ThUSA
.com

On the eve of the 100th anniversary of America's National Parks, we set out to tell the extraordinary story of their history and diversity, and to show how much these majestic landscapes improve our lives by offering each of us a place to play as well as sanctuary from the modern world. We aimed to inspire global audiences to get off the beaten path and find their own thrilling off-trail adventures awaiting them deep inside the American wilderness.

It is evident from the phenomenal reception the film and our broader Great Outdoors campaign has received from all over the world that *National Parks Adventure* will inspire many people for years to come to make one of America's national parks their next travel destination.

Making An Impact Around The World

- **Over 4 million people** have watched the film 119 theatres worldwide or online on Youku (China).
- *National Parks Adventure* was the **highest-grossing documentary film in the world in 2016**.
- The film's release is the industry's **fastest giant-screen roll-out** in 5 years, with 48 exhibitions in 6 countries in February, and 119 Theatres in 16 countries within the first 12 months.
- The film trailer has been seen by over 60 million people around the world.
- The film's PR campaign garnered **more than 4,000 pieces of earned media**, with **7 billion** media impressions.
- Local marketing efforts by exhibitors and film partners resulted in more than **1 billion additional global impressions** worldwide.
- Winner of the **2016 GSCA Awards** for Best Film, Best Cinematography, Best Sound Design, Best Original Score and Best Marketing Campaign, the Travel Weekly Award **2016 Gold Magellan Award** for best Advertising/Marketing Campaign.
- Winner of 3 **Gold Awards** at the **2016 HSMAI Adrian Awards** for Best Global Campaign, Advertising Innovation and PR Special Events and an Advertising Platinum Award.
- 2017 winner of the **Brand Film Festival Award** for Best Film by a Brand.



The Power of
Music

*"Just look around the whole wide
world
So many beautiful things to see
Take my hand and come along
spread some love with me"* Aloe
Blacc



MacGillivray Freeman's

AMERICA'S MUSICAL JOURNEY

COMING SOON TO GIANT SCREEN THEATRES

FEBRUARY 2018

www.AmericasMusicalJourney.com

MACGILLIVRAY
FREEMAN
FILMS

 Expedia

 Visit
TheUSA
.com

When Emotion is Too Great for Words, There's Music

MUSIC CITY CARES TO BENEFIT VEGAS
DONATE AT:

www.CFMT.org

#PrayForVegas

#VegasStrong



**Travel connects.
Travel heals.
Travel overcomes.
Travel makes us stronger.**





Like/Follow/Share

Travel Industry
TheBrandUSA.com

 [@BrandUSA](https://twitter.com/BrandUSA)

 [BrandUSATV](https://www.youtube.com/BrandUSATV)

 [BrandUSA](https://www.linkedin.com/BrandUSA)

Consumer
VisitTheUSA.com

 [@VisitTheUSA](https://twitter.com/VisitTheUSA)

 [VisitTheUSA](https://www.facebook.com/VisitTheUSA)

 [VisitTheUSA](https://www.youtube.com/VisitTheUSA)

 [VisitTheUSA](https://www.instagram.com/VisitTheUSA)

 [VisitTheUSA](https://plus.google.com/VisitTheUSA)



Thank You