



Charleston Area CVB 2019 Travel Council Annual Luncheon

June 20, 2019

Travel Powers the Economy and Enhances the Image of the USA

- **#1 Services Export**

- 79.6 million international visitors spent \$255.5 billion
- \$69.3 billion trade surplus
- 31% of U.S. service exports; 10% of all U.S. exports

- **2.8% of GDP**

- \$1.62 trillion in economic output
- \$141.5 billion in tax revenue

- **7.8 Million Jobs Supported by Travel**

- 5.5 million direct; 2.3 million indirect
- Top 10 employer in 49 states and DC
- 1.2 million jobs supported by international travelers

- **International Visitation Enhances the Image of the USA***

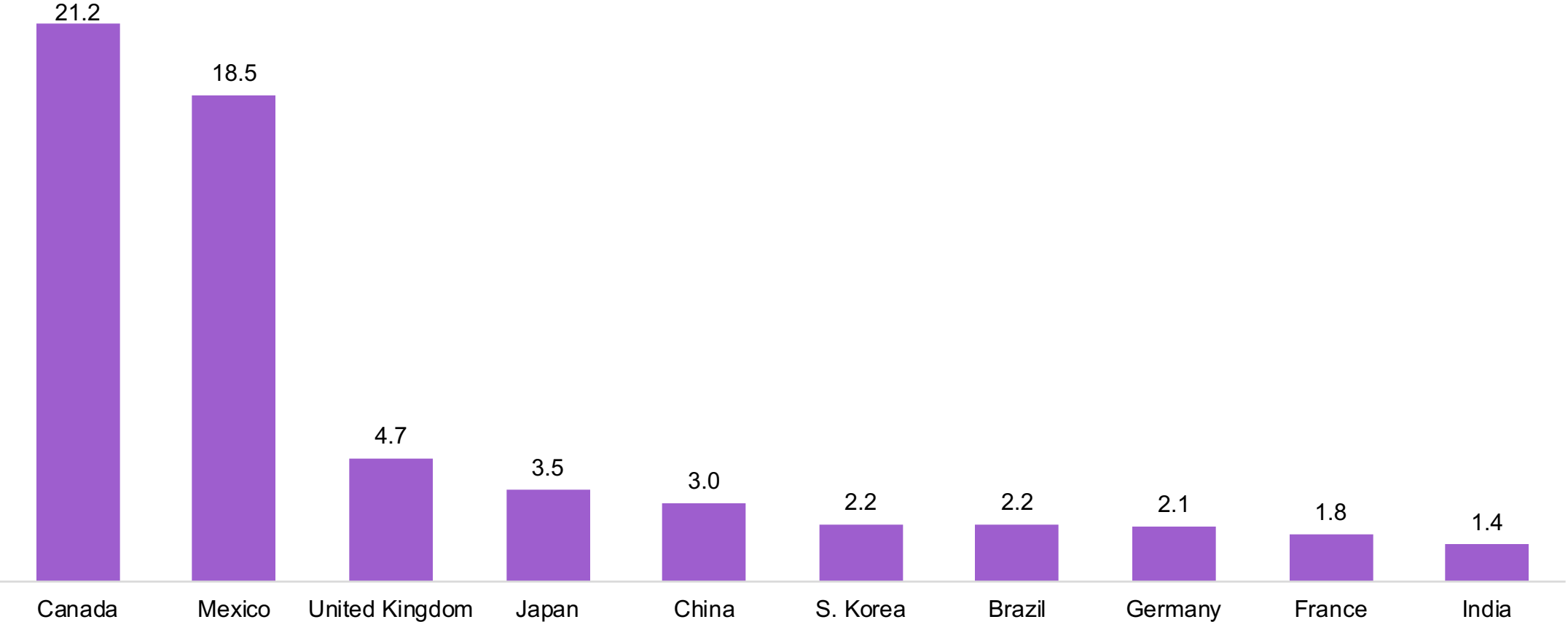
- 74% more likely to have a favorable view of the USA after they visit
- 61% more likely to support U.S. policies after they visit



- **Market Share**

- The USA welcomes 5.8% share of the world's travelers and leads the world in global tourism receipts, commanding 15.7% of world traveler spending

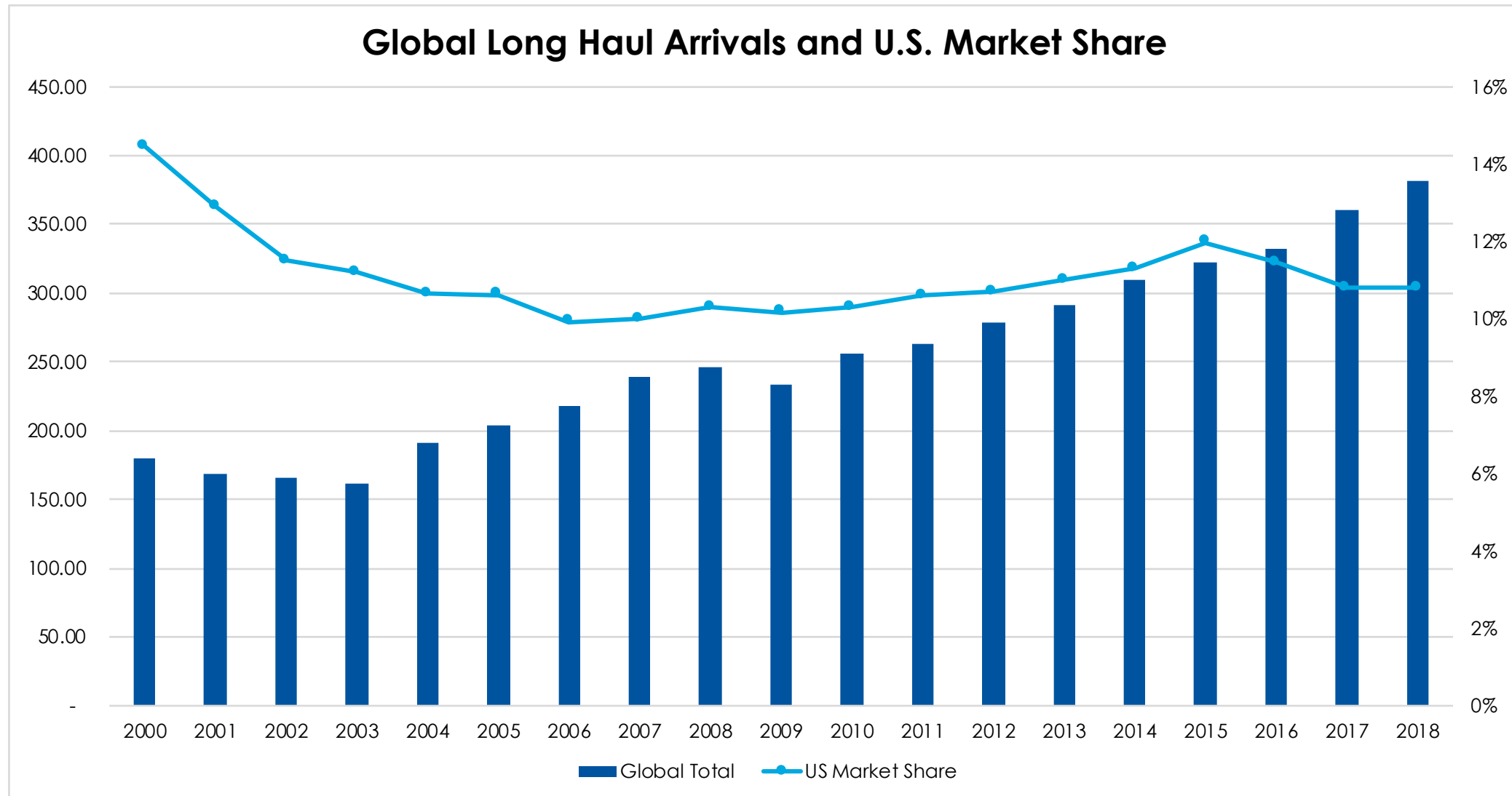
2018 Top 10 US Inbound Markets (visitation in millions)



Sources: U.S. Department of Commerce, ITA, I&A, National Travel and Tourism Office (NTTO) I-94 Program, Statistics Canada, and Instituto Nacional de Estadística y Geografía/INEGI in Mexico, May 2018



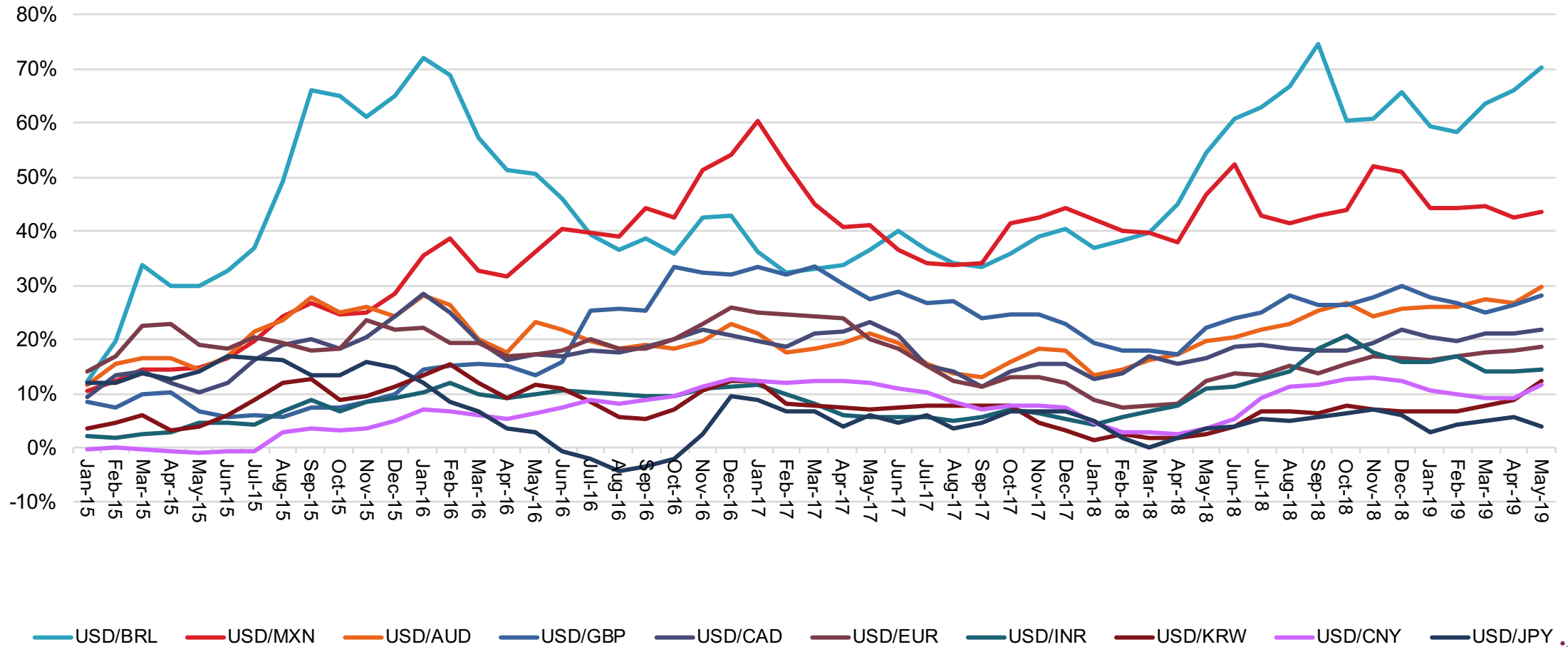
USA Market Share (long-haul)



Key Factors Driving Inbound Visitation

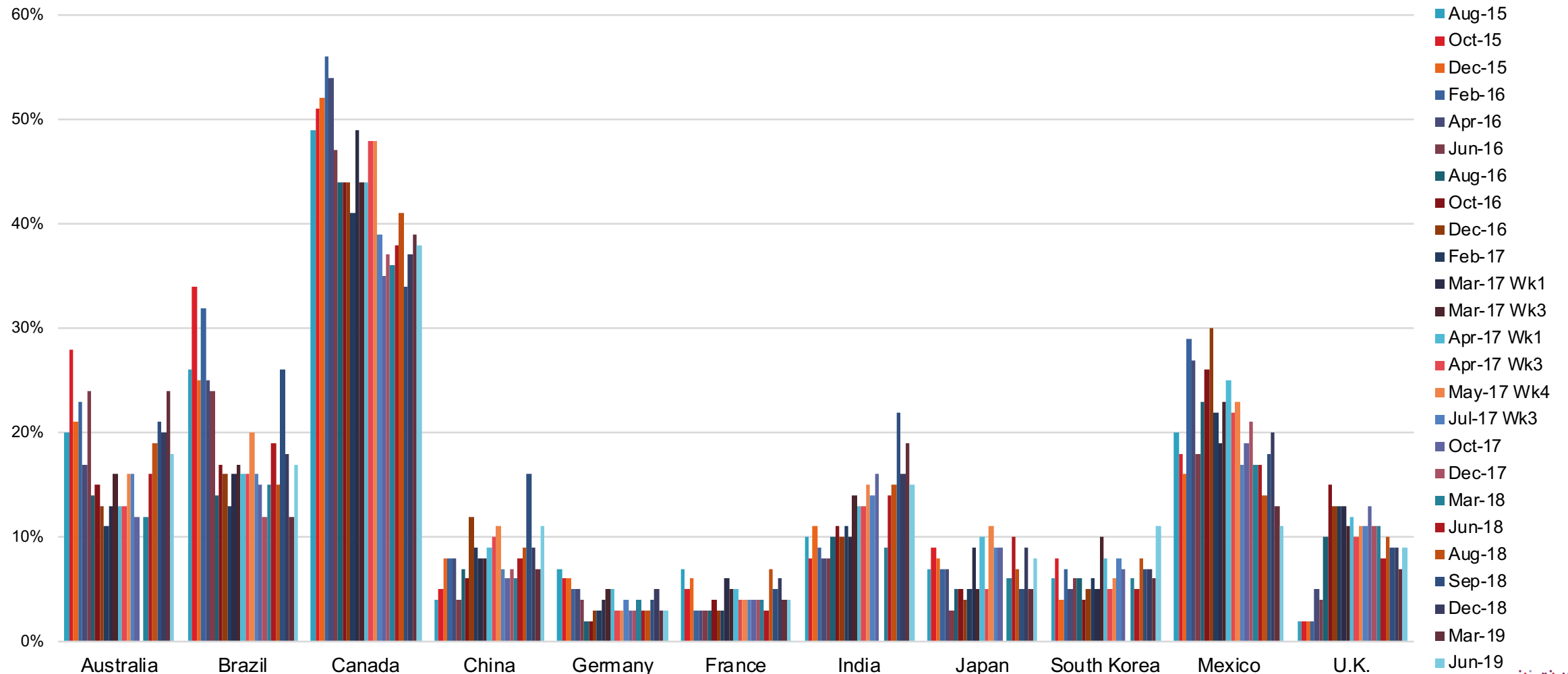


Currency Exchange Rates (2014 Index)



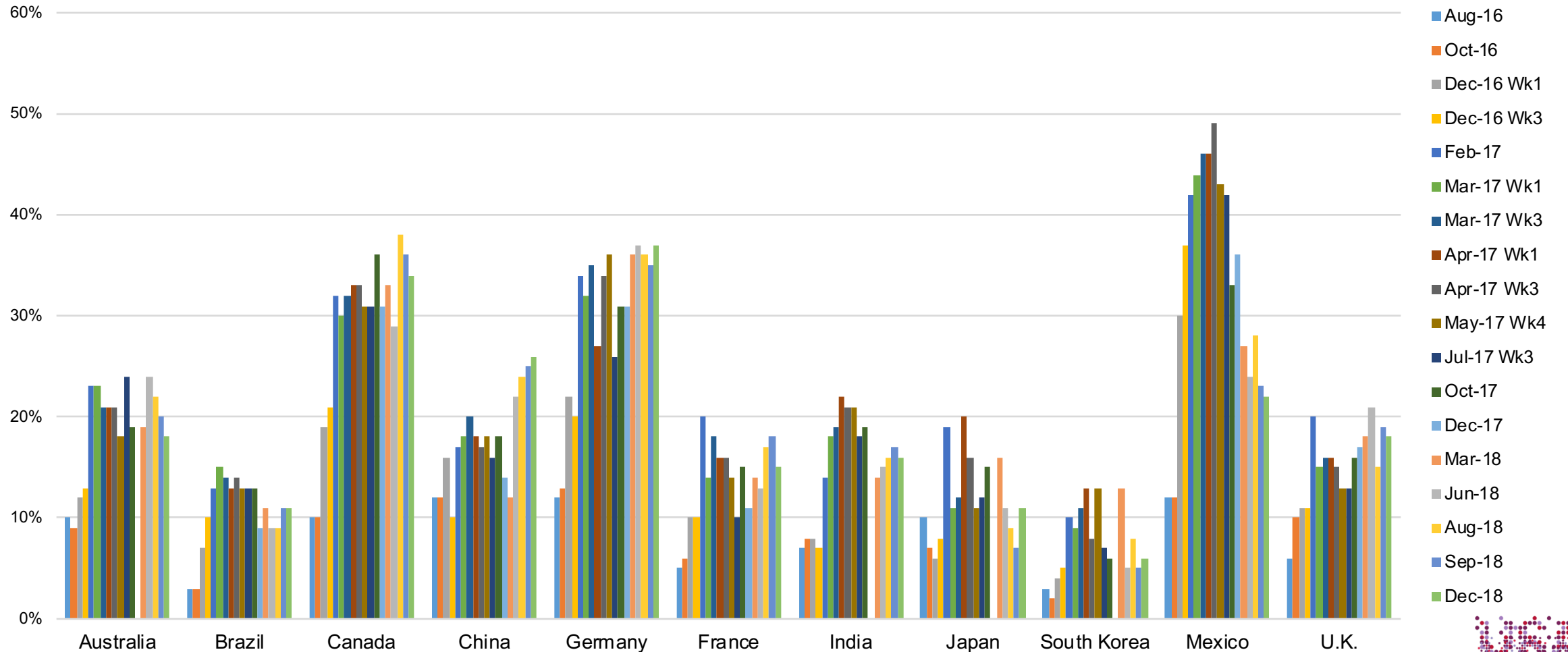
Source: Oanda

Currency Exchange as Reason for Not Visiting USA (among those not planning to visit)



Source: ORC, custom study

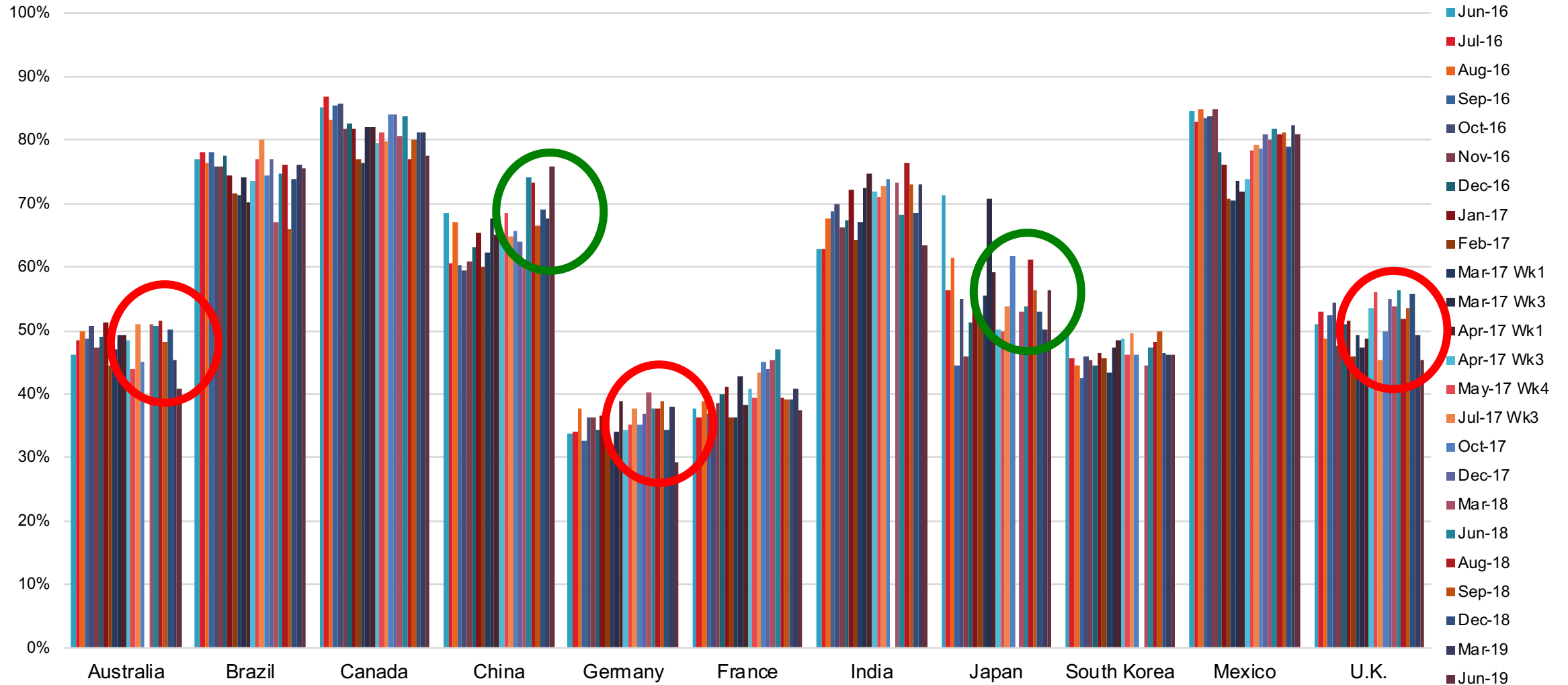
Political Climate as Reason for Not Visiting USA (Among those not planning to visit)



Source: ORC, custom study



Likely to Visit the USA in the Next Two Years



Source: ORC, custom study





The USA's unique value proposition

Diversity

The diversity of the USA's destinations and people is exciting and unique.

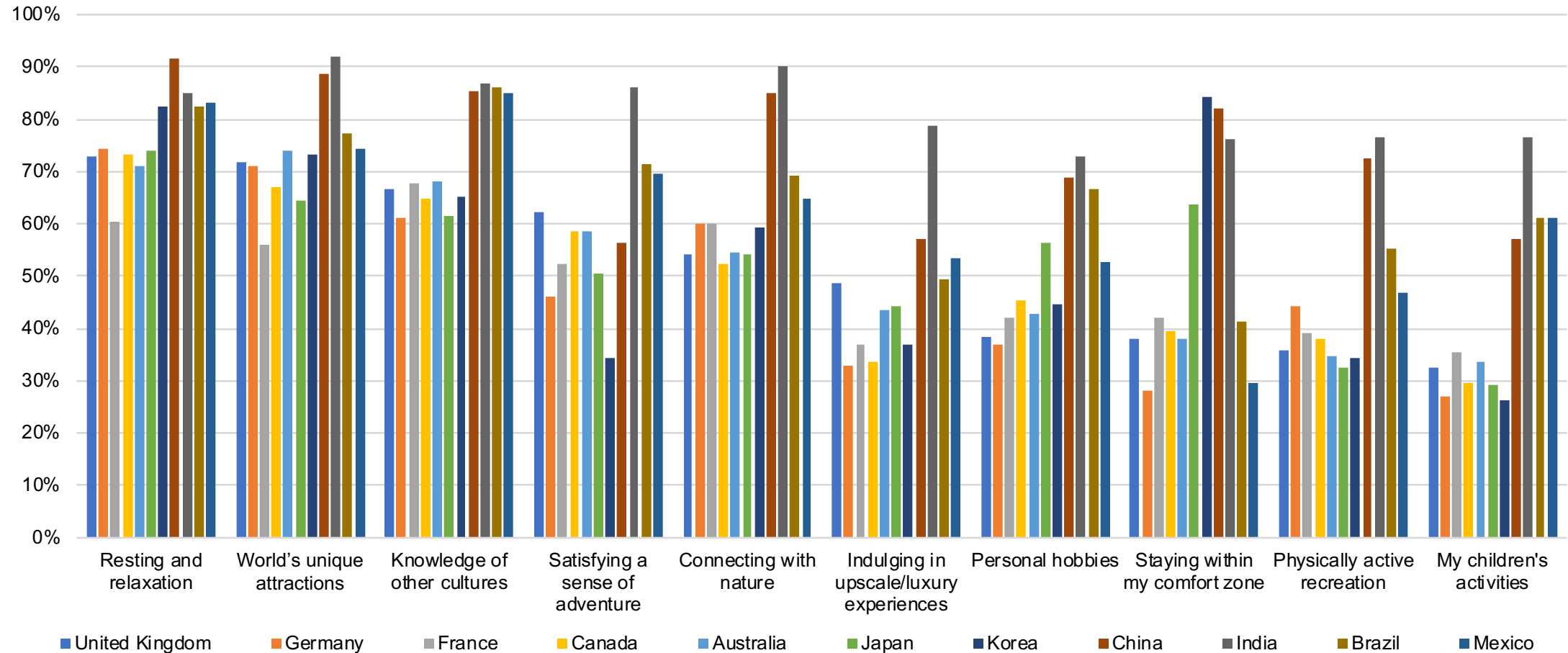
Experiences

The USA offers nearly limitless authentic travel experiences.

Proximity

The proximity of the USA's diverse and authentic travel experiences (to, through, and beyond the gateways) provides travelers more value in a single visit than any other destination in the world.

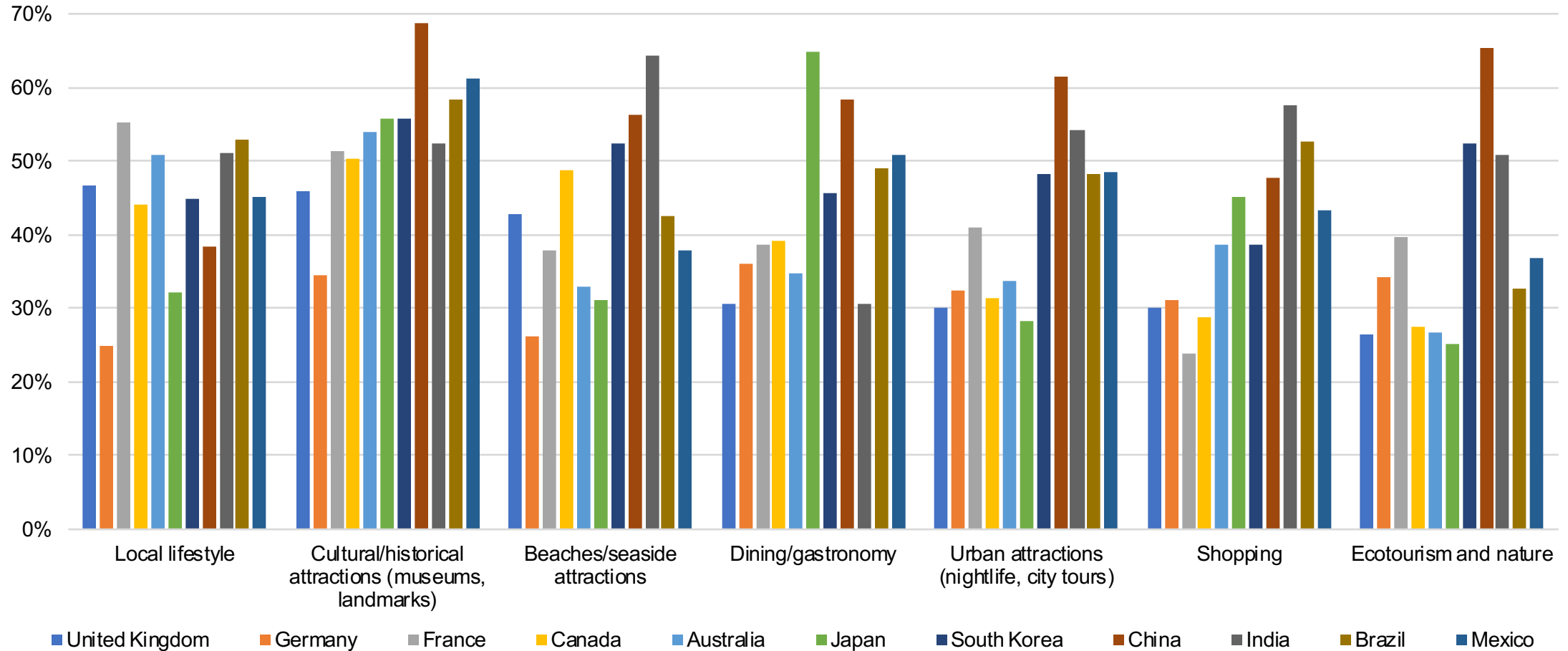
Personal Considerations when Deciding International Destinations



Source: Brand USA 2019 Market Intelligence Study
 Base: Intercontinental travelers (N ≈ 990 to 2,030, varies per market)



Motivations for Selecting Intercontinental Destinations



Source: Brand USA 2019 Market Intelligence Study
 Base: Intercontinental travelers (N ≈ 990 to 2,030, varies per market)



Top Rated USA Destination Characteristics

1.



Leisure

(Dining, Shopping, Nightlife)

2.



Natural Features

(Features/Landscapes)

3.



Landmarks and sightseeing

(Historical sites, museums, etc.)

4.



Reputation/Popularity

5.



Ease of Travel to the destination

6.



Activity Options

7.



Local Culture

(Food, music, etc.)

8.



Quality of Beaches

Brand USA



How We Market the USA

Brand USA's core strategies to increase international visitation, spend, and market share for the United States include our consumer-focused USA Campaigns, trade outreach, and cooperative marketing programs that, in total, promote the United States in its entirety while adding and creating value for our partners.



**Global Consumer
Campaigns**



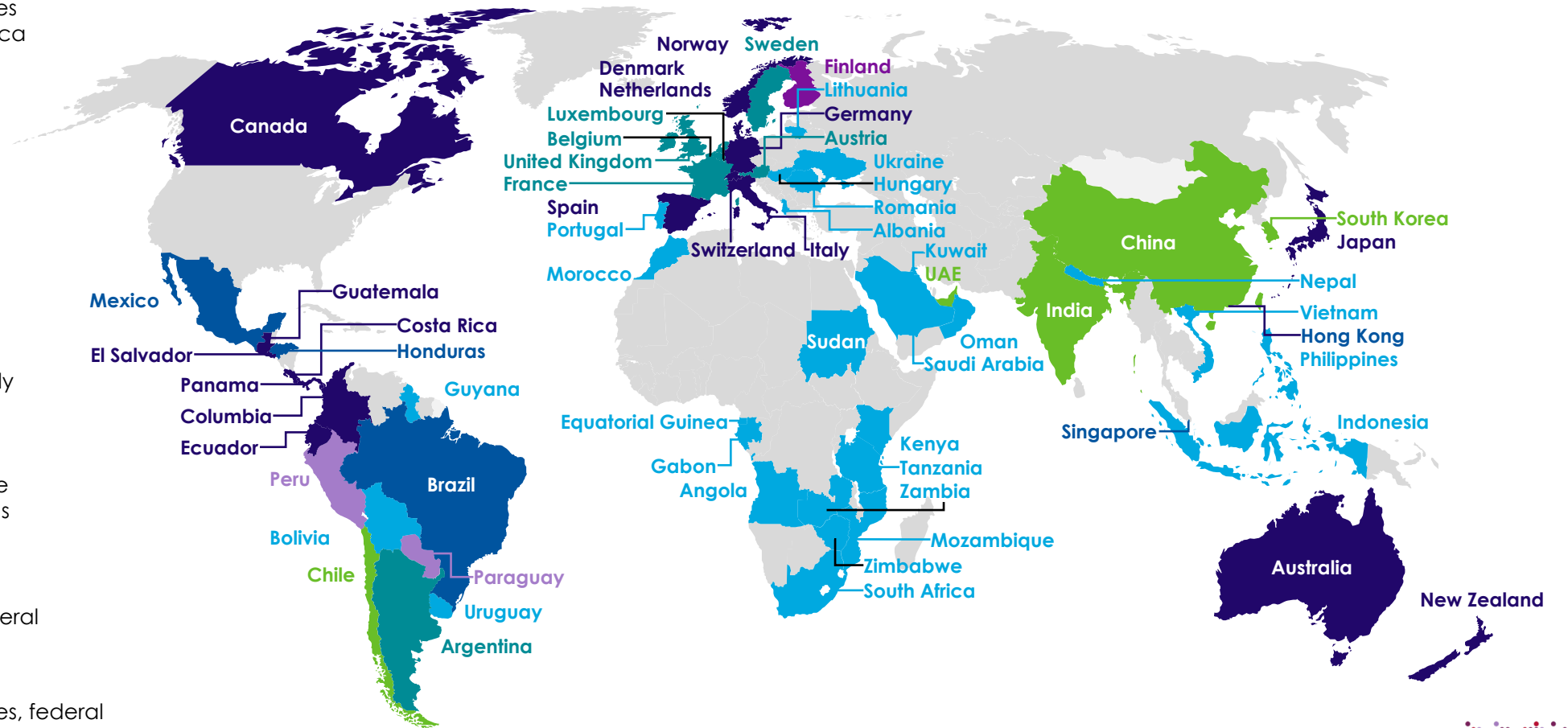
**Travel Trade
Outreach**



**Cooperative
Marketing Programs**

Brand USA around the world

- Brand USA marketing initiatives and Visit USA/Discover America committee activities
- Brand USA marketing initiatives only
- Visit USA/Discover America committee activities only
- Federal partner programs only
- Brand USA marketing initiative and federal partner programs
- Visit USA/Discover America committee activities and federal partner programs only
- Brand USA marketing initiatives, federal partner programs, and Visit USA/Discover America committee



Over the past six years, Brand USA's marketing efforts have generated...

900+
partners

(with a 94%
retention rate)



6.6 million
incremental visitors



\$21.8 billion
incremental spending



nearly
52,000
incremental
jobs supported
each year

\$6.2 billion
federal, state &
local taxes



\$47.7 billion
total economic
impact



ROI Data Source: Oxford Economics



Integrated marketing

We weave **engaging narratives** and **create powerful, authentic storytelling** across owned, paid, and earned media in order to entertain, engage, and inspire travelers to visit the USA.



Storytelling
approach



Device
strategy



Entertainment
platforms



Social
and digital



Consumer
and trade PR

Storytelling through many voices

Give a voice to real travel experiences within the USA

Create urgency and provoke “travel dreaming” by highlighting first person storytelling & perspectives

Lend authenticity to our communications, as well as creating a sense that there are many United States

Incorporate and build on our foundational **value proposition** (proximity), **competitive edge** (possibility) and **tone** (welcome)

Our content strategy will focus on curating individual voices that each express a particular point of view and place of interest.



Who are the Many Voices?

Locals

A place is defined by those who live there, who have explored its culture, roads and trails like no other and can welcome and inspire.

Category experts

Travelers look to category experts like journalists, hoteliers, cabbies and others to inspire their travel decisions. We will use them to guide our community.

Visitors

To travel is to know and the past visitor now becomes the storyteller and the evangelist for travel to the USA.

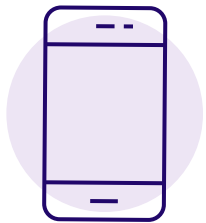
Creative class

We will amplify creative voices to show America as it hasn't been seen before via musicians, writers, photographers, artists and poets.



Screen strategy and storytelling platforms

Mobile



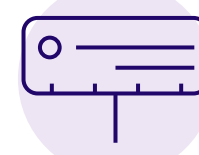
**Laptop/
desktop**



**Smart
TV**



**Digital
OOH**

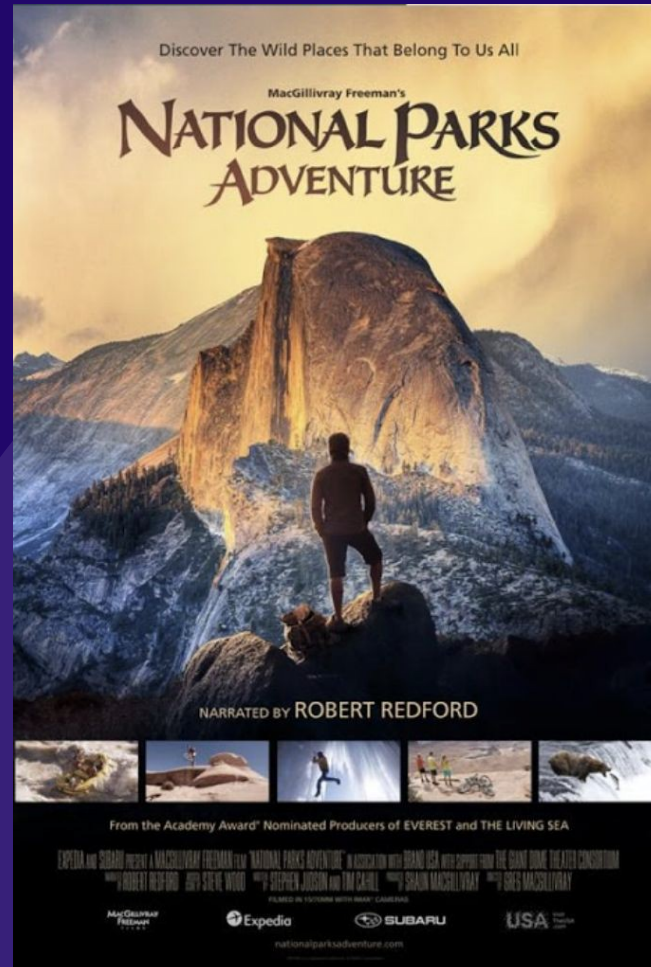


**Giant
screen**



“From mobile to giant screen and everything in between”

Giant screen films



Multi-screen World Evolving

1 in 3 consumers say they no longer have cable TV or never did.

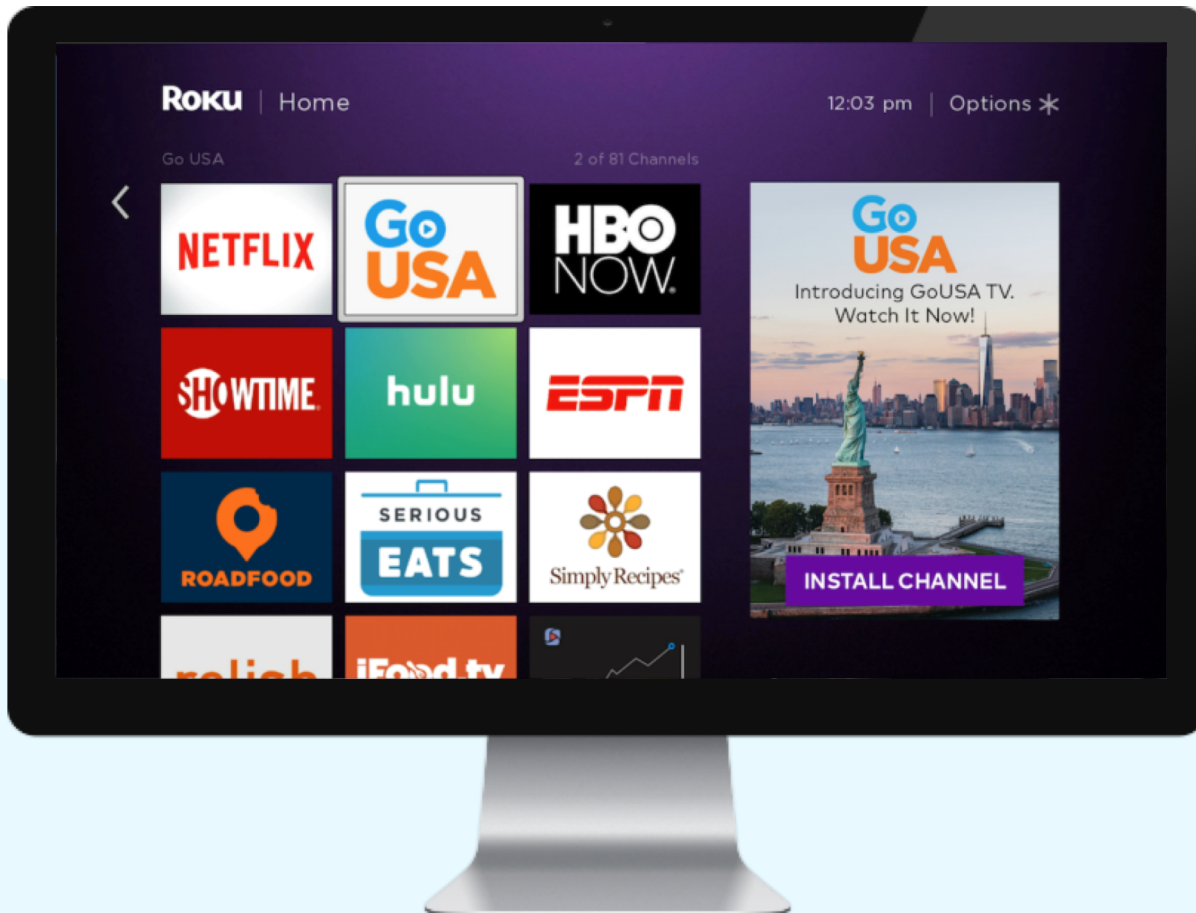
6 out of 10 people prefer video platforms to live TV.

By 2025, half of all viewers under the age of 32 will not subscribe to a pay TV service.

80% of TV sales are now for Internet-enabled, interactive TVs.



GoUSA TV



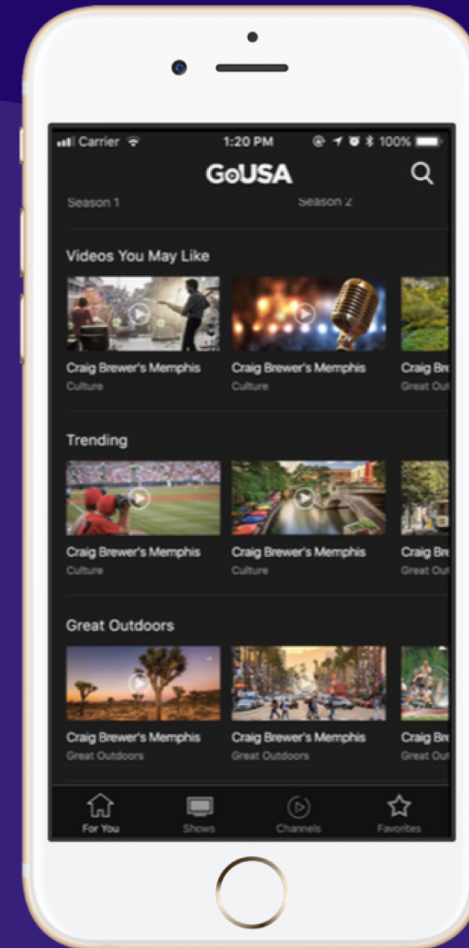
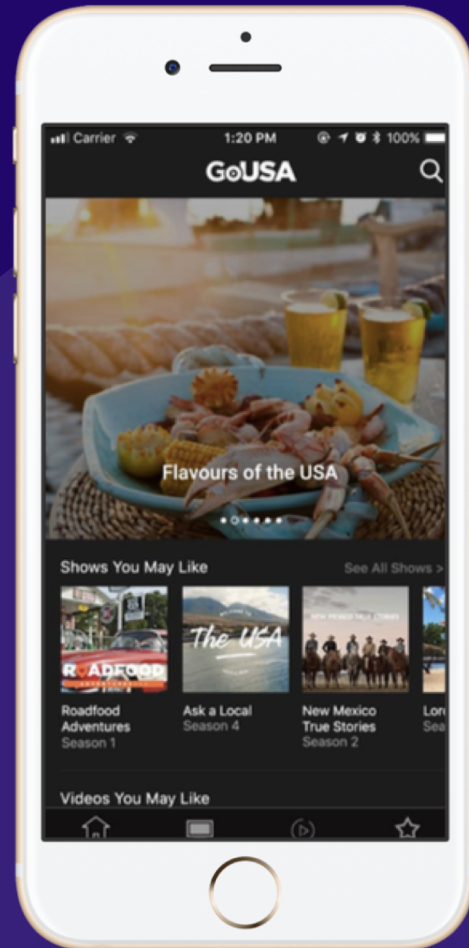
Inspire travel through
entertainment

Curate entertainment-driven
storytelling with a distinct
sense of place

Be the go-to channel for
content featuring U.S.
destinations



GoUSA TV mobile app



Brand USA Core Storytelling Campaigns

Ask A Local



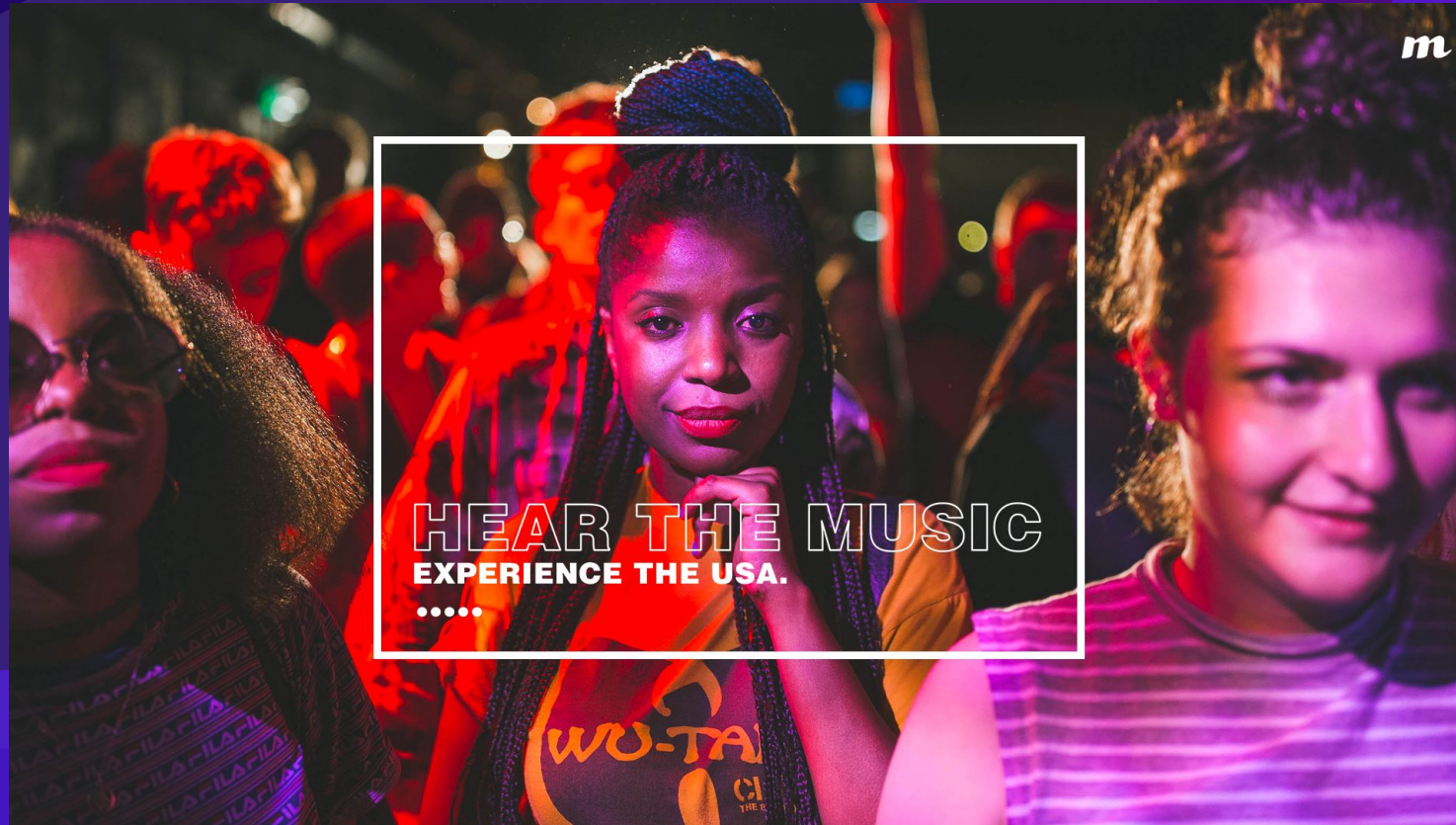
Hear The Music



United Stories



Hear The Music, Experience the USA

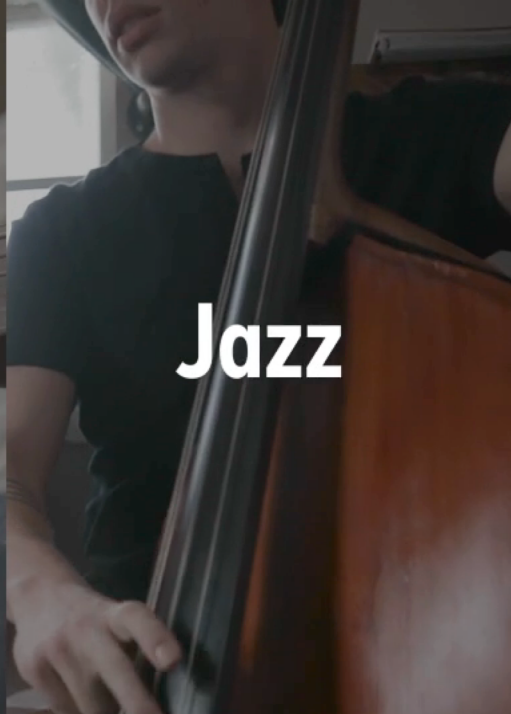




Motown



**Hillcountry
Blues**



Jazz



Rock



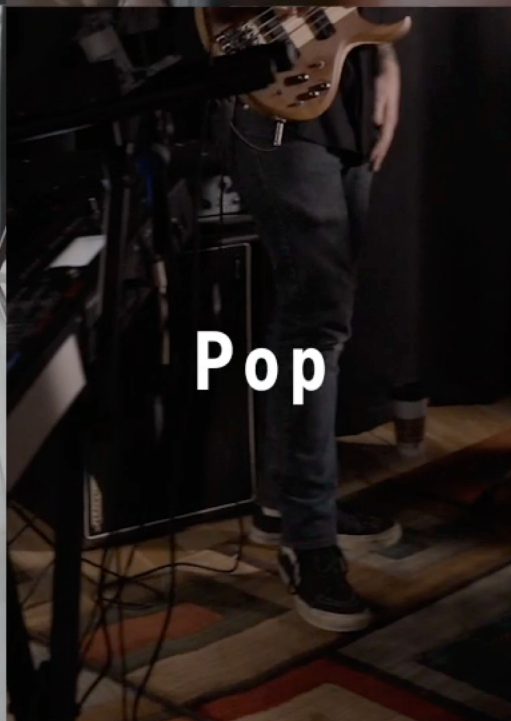
**Vintage
Rock**



**Latin
Fusion**



**Piano
Funk**



Pop



Blues



Bluegrass



UNITED STORIES



On Now & Coming Soon





VisitTheUSA.com

Explore Charleston



Brand USA & Explore Charleston

MegaFams

- UK/Ireland 2018
- UK/Ireland 2019

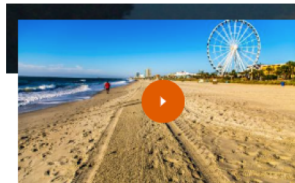
Cooperative Marketing

- Global Inspiration Platform: 2012-2019
- Multi-Channels:
 - Canada East
 - Germany
 - UK
- UK Digital Tour Operator Campaigns
- News UK Program

More than
\$1 Million in
LOA
Contributions



Explore Charleston



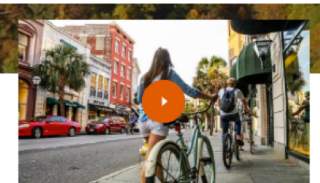
Experience
Fun Things to Do in South Carolina



Experience
Charleston, South Carolina:
Keys to an Unmatched
Culinary Scene



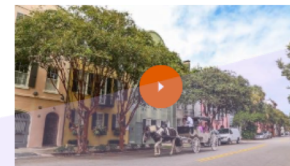
Experience
Charleston, South Carolina:
Things to Do and Places to
See



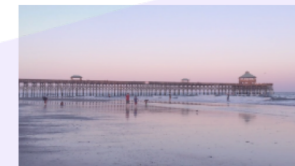
Experience
Charleston: An Outdoor
Lover's Paradise



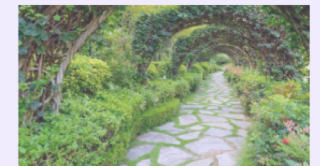
Experience
Springtime on Charleston's
Plantations



Experience
Discovering Culture in
Charming Charleston



Experience
72 Hours in Charleston, South
Carolina



Experience
How to Sneak a Peek at
Charleston's Secret Gardens



Thank you!

Like/follow/share



Consumer

VisitTheUSA



VisitTheUSA.com

Travel industry

TheBrandUSA.com



GoUSA