



International Travel to the USA and Marketing Bike Tourism



Date

U.S. Travel and Tourism Landscape



Travel Powers the Economy and Enhances the Image of the USA

- **#1 Services Export**

- 79.6 million international visitors spent \$256.1 billion
- \$69.6 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***

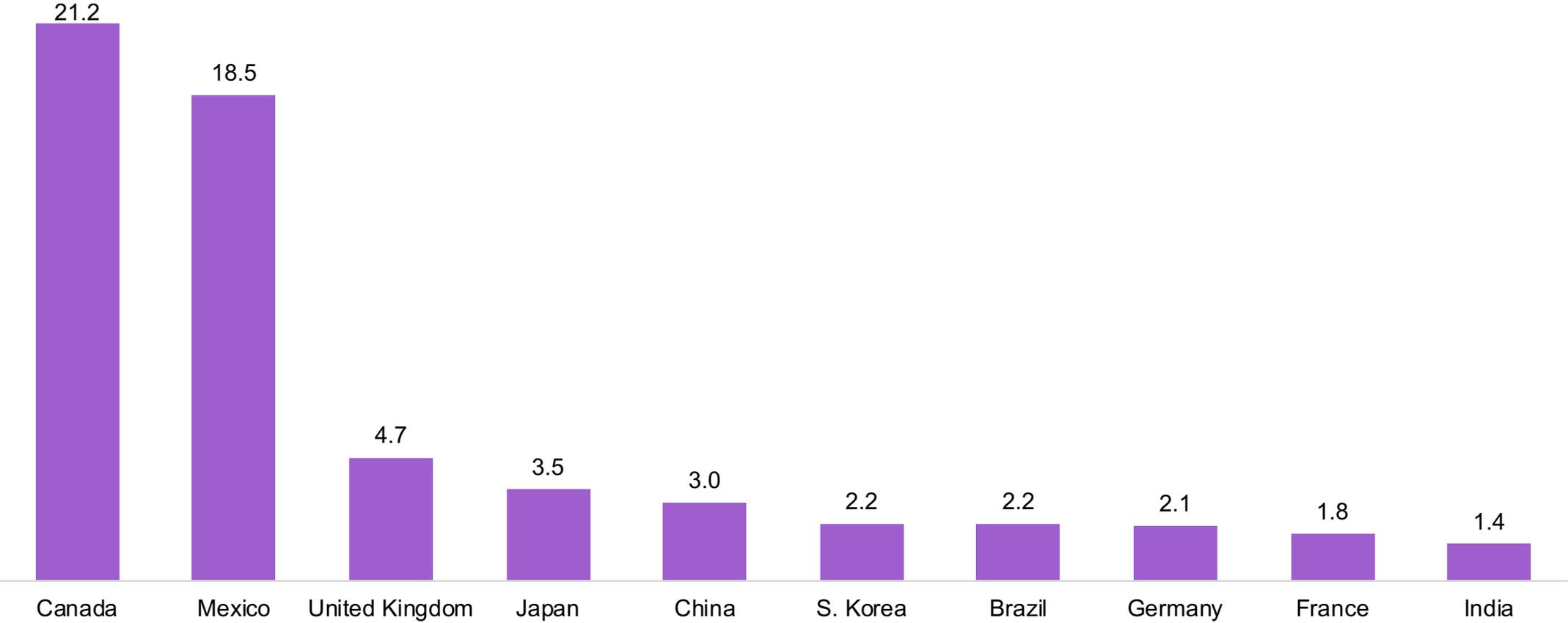
- 74% more likely to have a favorable view of the USA after they visit
- 61% more likely to support U.S. policies after they visit



- **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, July 2019



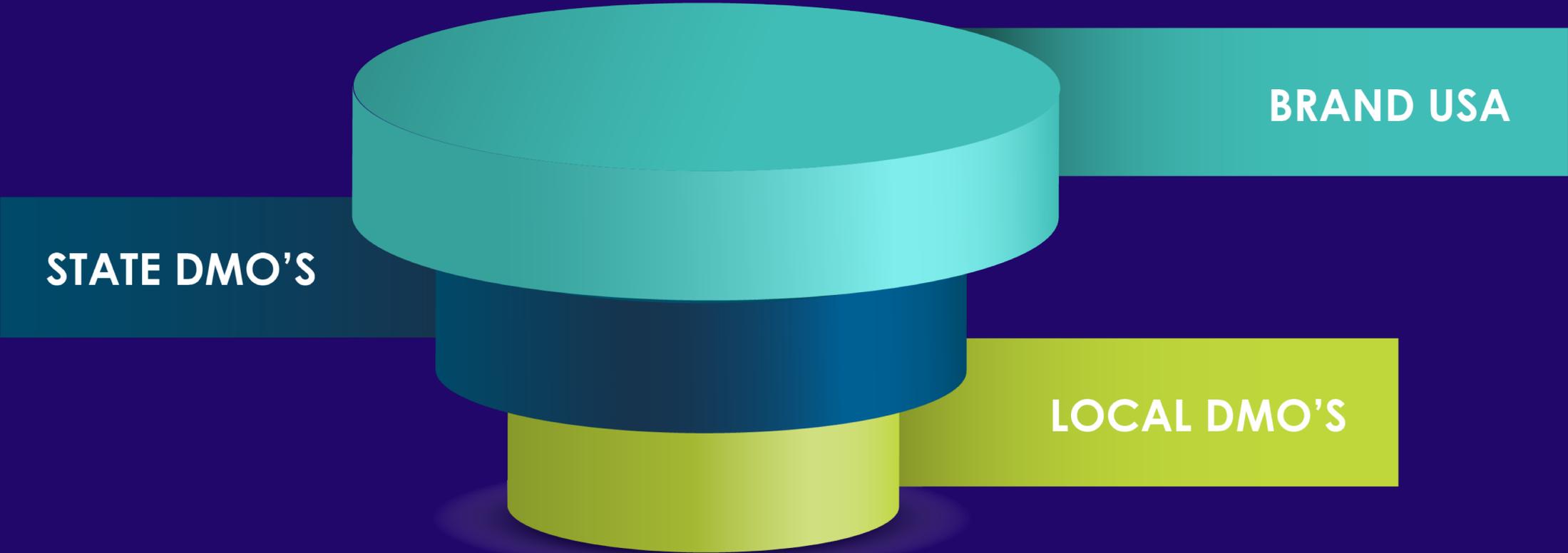
About Brand USA



Brand USA's Role in Travel and Tourism in the USA



Brand USA's Role



Brand USA Funding Model

and the Electronic System for Travel Authorization (ESTA)



Traveler applies for a travel authorization (ESTA) on the Department of Homeland Security website at esta.cbp.dhs.gov/esta

The \$14 Fee is paid to the Department of Homeland Security.

\$14

The ESTA is valid for multiple trips to the USA for two years.



\$4

Covers administrative costs for the U.S. Department of Homeland Security



\$10

Held in the Travel Promotion Fund in the U.S. Treasury



For every \$1 Brand USA raises in cash and in-kind contributions, Brand USA is eligible to receive \$1 from the Travel Promotion Fund (up to a maximum of \$100 million annually)

\$100 Million
from Contributors



\$100 Million
from the Travel Promotion Fund

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**



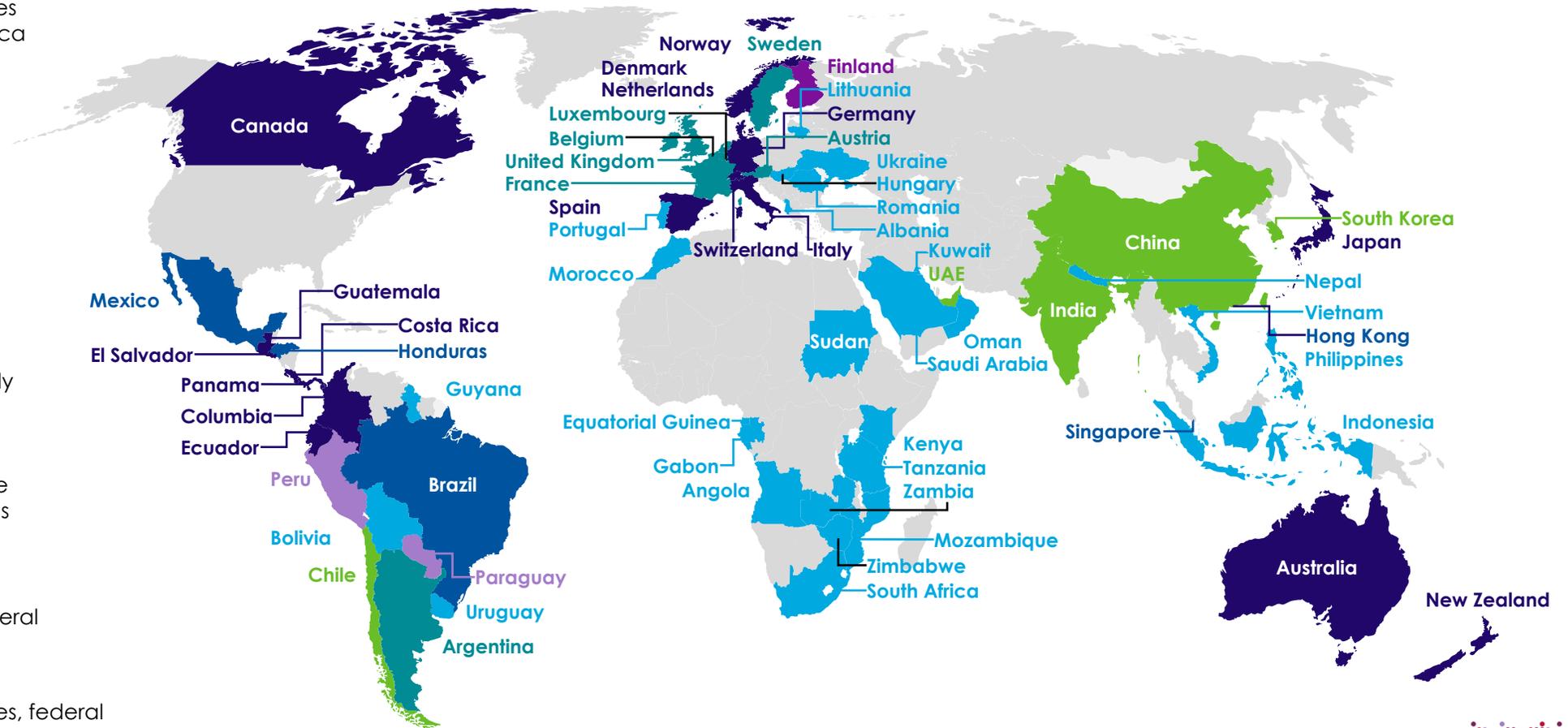
**Travel Trade
Outreach**



**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



Marketing the USA





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.

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



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Campaigns**



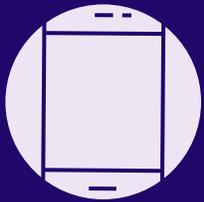
**Travel Trade
Outreach**



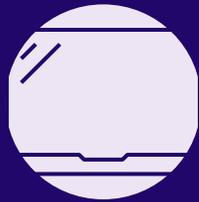
**Cooperative
Marketing Programs**

Screen strategy and storytelling platforms

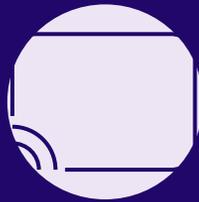
Mobile



Laptop/
desktop



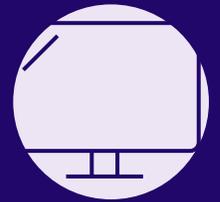
Smart
TV



Digital
OOH

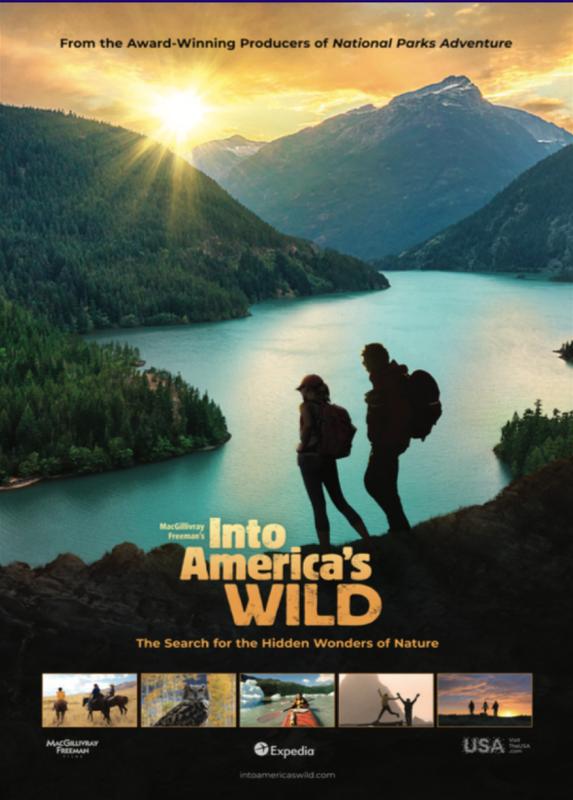
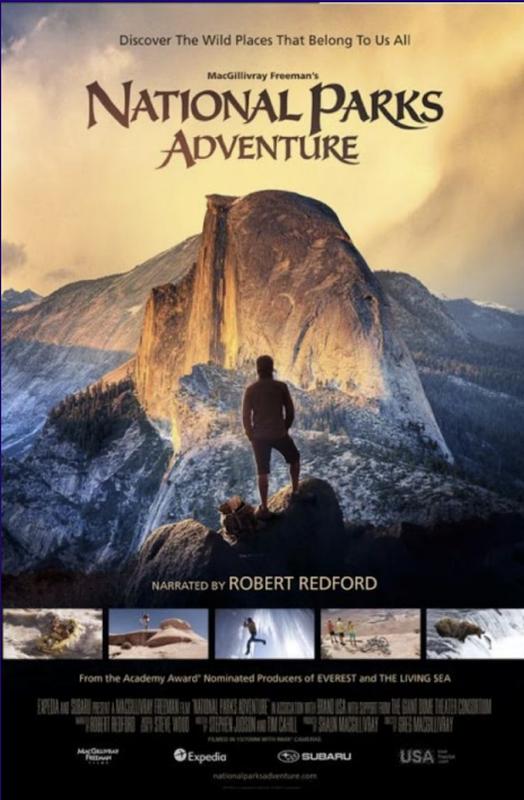


Giant
screen



“From mobile to giant screen and everything in between”

Giant-Screen Films



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

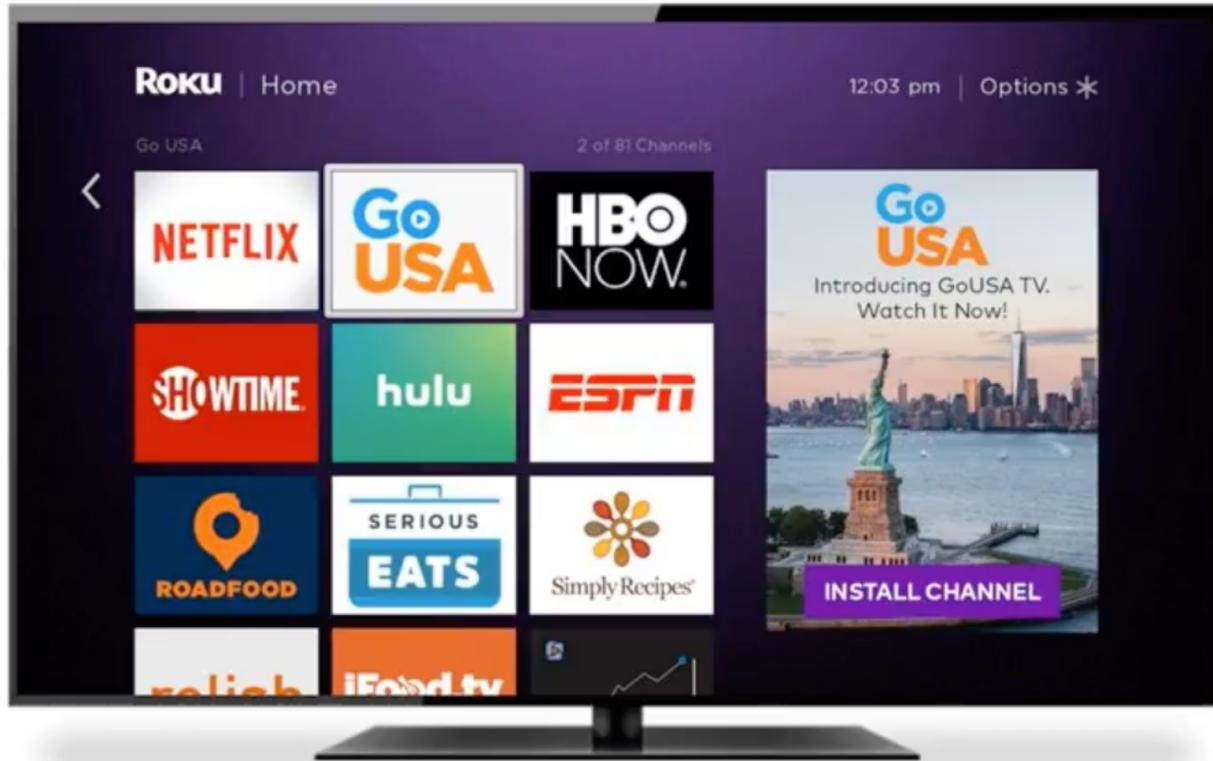
To travel is to know and the past visitor now becomes the storyteller and the evangelist for travel to the USA.

Creative class

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



GoUSA TV



- We live in a multi-screen, multi-platform world, with one in three consumers saying they've never had cable television, or no longer do.
- While people are watching less linear television, time with digital video is on the rise.
- By 2025, half of viewers under 32 will not subscribe to a pay TV service.
- Currently 80% of television sales are internet-enabled, interactive televisions that support the increasing amount of consumers who consider themselves "cord-cutters."
- Viewers retain 95% of a message when they watch it in a video compared to 10 percent when reading it in text.
- Available on Roku, Amazon Fire, Apple TV, iOS, and Android devices

Brand USA Core Storytelling Campaigns

Hear The Music



United Stories



Ask A Local





UNITED STORIES







Thank you!



Consumer

VisitTheUSA



VisitTheUSA.com

Travel industry

TheBrandUSA.com

 @BrandUSA

 BrandUSATV

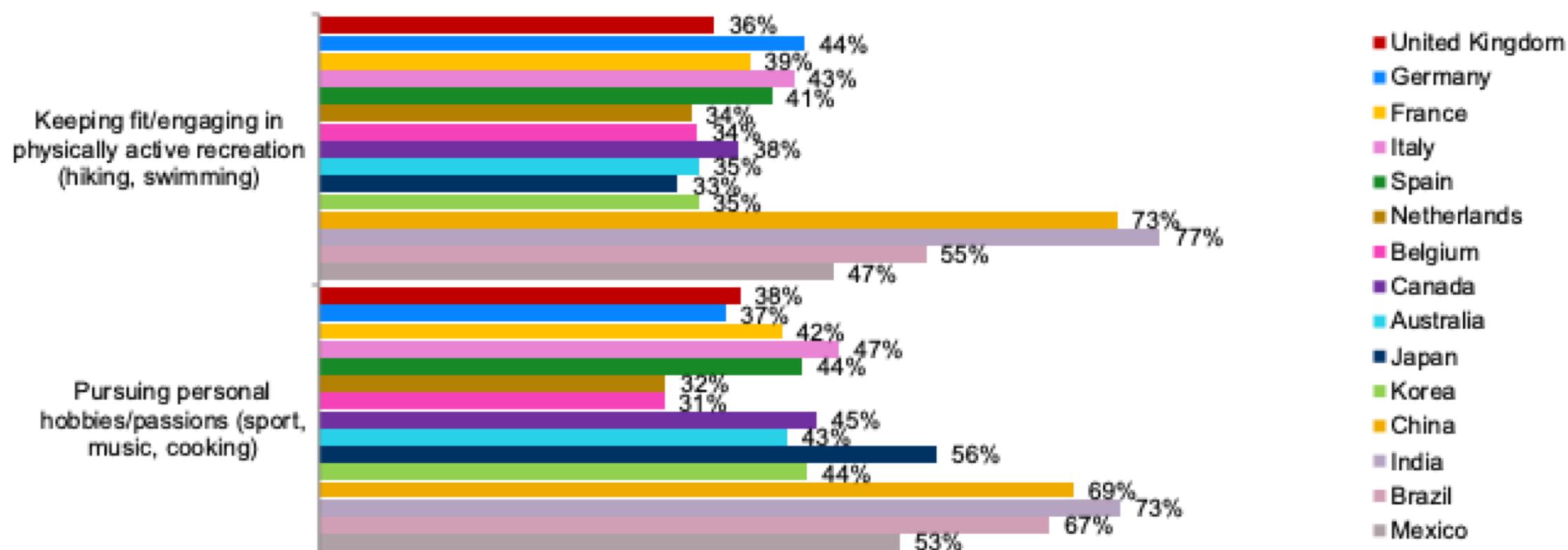
 BrandUSA

 Brand USA

GoUSA



Personal Considerations: Very Important + Extremely Important (Cont.)



Question: Please indicate how important each of the following personal considerations generally is to you when deciding where to go on an international holiday.

Please assign a number from 1-5, with 1 being not at all important/not applicable, 3 being moderately important and 5 being extremely important.

Base: Intercontinental travelers - U.K. (N=1035), Germany (N=1030), France (N=1008), Italy (N=1035), Spain (N=1017), Netherlands (N=1017), Belgium (N=1007), Canada (N=2011), Australia (N=1007), Japan (N=1078), Korea (N=990), China (N=1050), India (N=1012), Brazil (N=1014), Mexico (N=2032)