

PRSA

PRSA 2019 TRAVEL AND TOURISM SECTION CONFERENCE

LET PR RING

LET PR RING: LIFE, LIBERTY AND THE PURSUIT OF TRAVEL

REACHING OVERSEAS

Moderator: Nick Wayland, TravMedia



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VIAJAMOS A FILADELFIA PARA DECIRTE CÓMO VIVIR LA TENDENCIA BLEISURE, BUSINESS + LEISURE, DURANTE TU PRÓXIMO VIAJE DE NEGOCIOS.

POR LAURA BURGOS

Eye of the Tiger como fondo en mi cabeza, yo corriendo -al menos intentándolo- por las escaleras del museo de arte y finalmente posando incómodamente para la popular foto estilo Rocky Balboa. Esta era la única escena que venía a mi mente al pensar sobre las cosas que podría hacer en Filadelfia, pero vaya que me sorprendí. Filadelfia no es pretenciosa. Es cool sin intentarlo.

Conoce lo que descubriré durante mi paso por la enigmática Philly, un destino que te conquistará si te das la oportunidad pues se trata de la ciudad perfecta si viajas por negocios, ya que al terminar todas tus reuniones podrás aprovechar al máximo su lado turístico.



14 | CHIC PASSPORT

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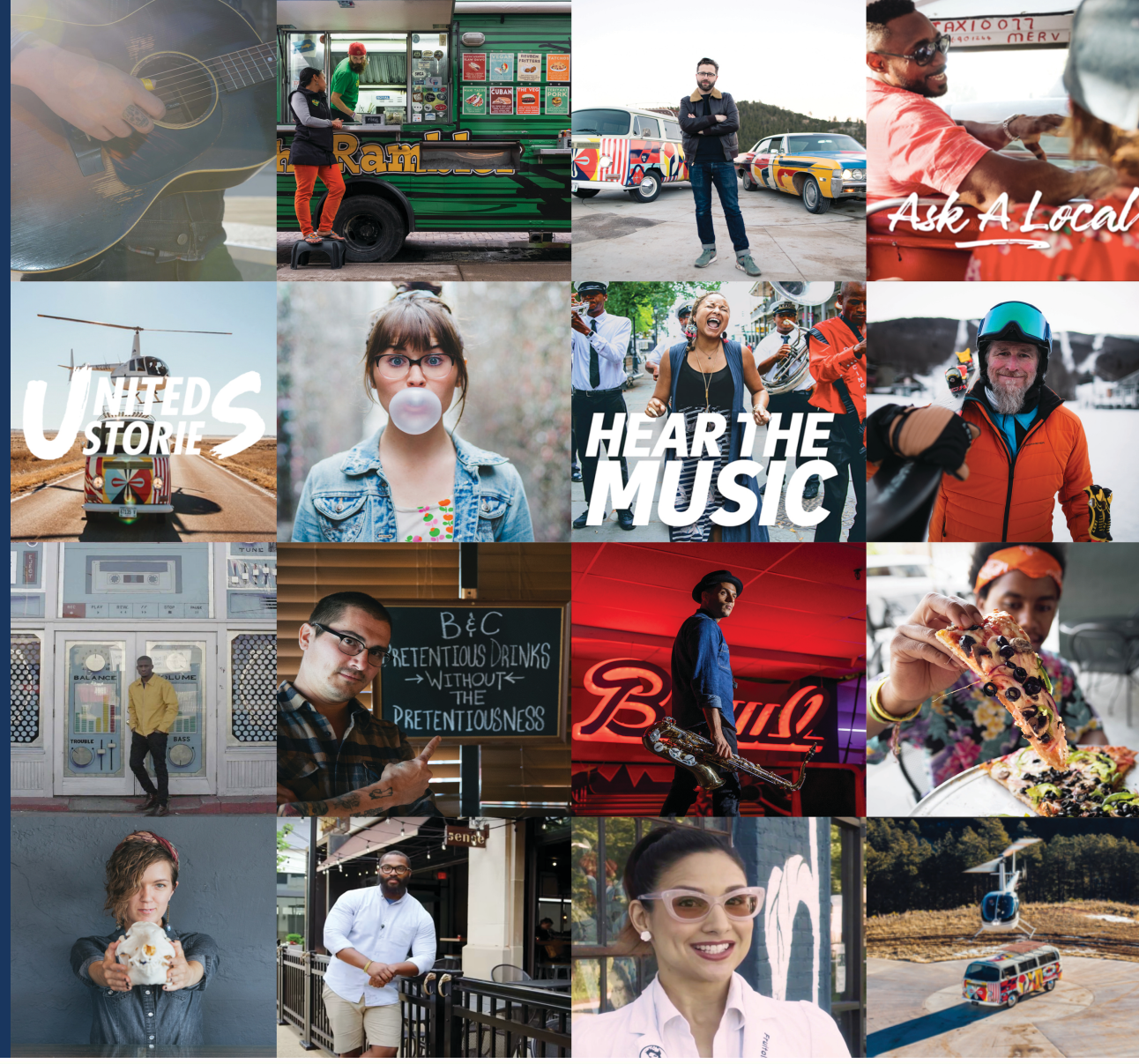
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Recent Story

Key Takeaways

1. What markets might be right for you
2. What the media landscape looks like in those markets
3. How best to influence overseas travelers right now



How Brand USA Reaches International Travelers



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But first...a little bit about Brand USA



Brand USA is 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 900 partners since 2011

Our Mission

Increase incremental international visitation, spend, and market share for the United States to fuel the U.S. economy and enhance the image of the USA with worldwide travelers.

Our Vision

We aspire to be 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 Lost Decade



37% The United States' share of international arrivals dropped 37%
(from 17% in 2000 to 12.4% in 2010)



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

The cost to 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

Source: U.S. Travel Association

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Travel Powers the Economy and Enhances the Image of the USA

Source: NTTO unless otherwise noted

■ #1 Services Export

- 76.9 million international visitors spent \$251.4 billion
- \$77.4 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

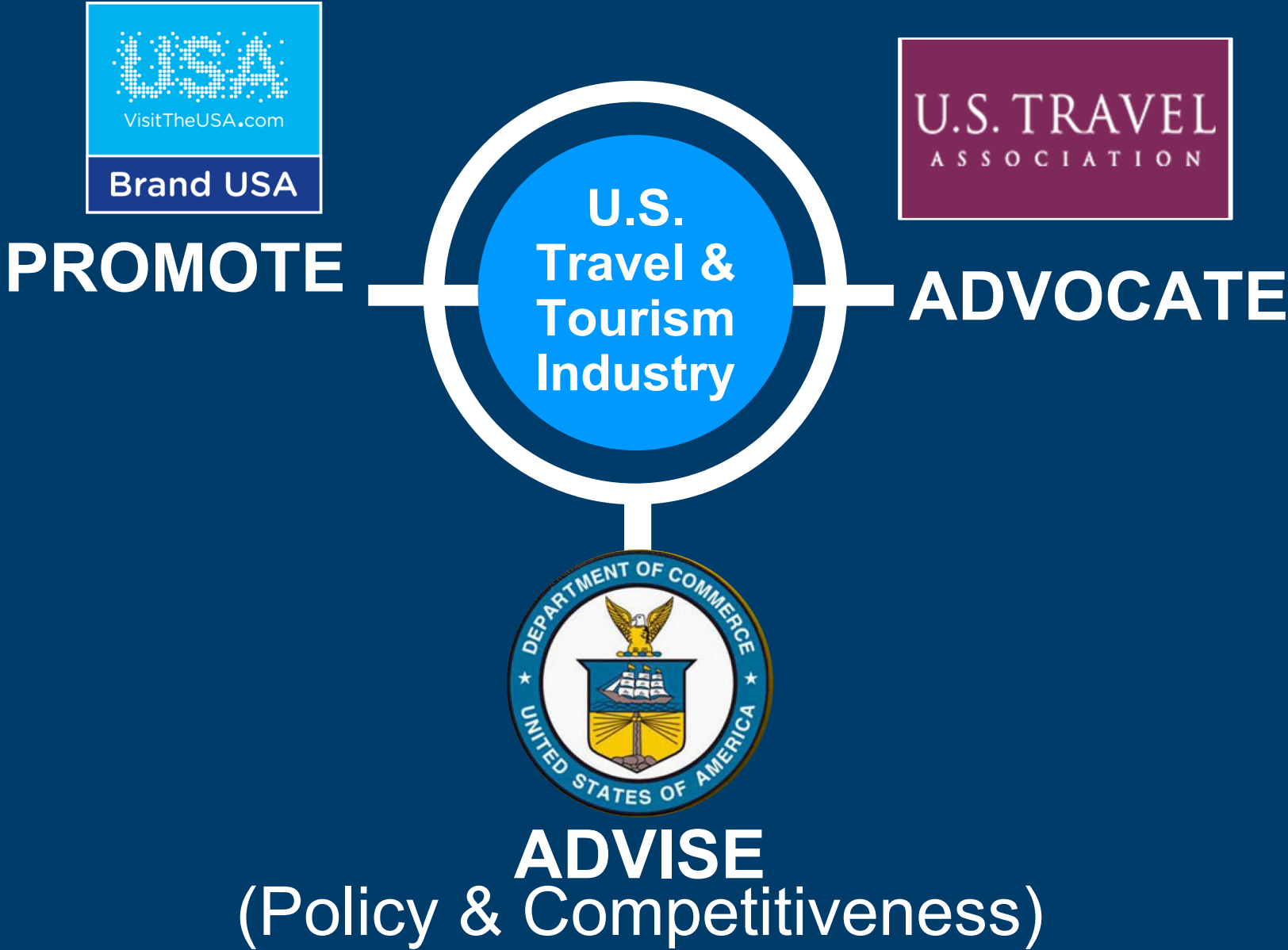
*Source: Pew Research Center



■ Market Share

- The USA welcomes 5.8% share of the world's travelers and leads the world in global tourism receipts, commanding 15.8% of world traveler spending

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



Defining Moments...So Far

March 2010

Travel Promotion Act becomes law

January 2012

Executive Order:

- Visa Efficiencies
- National Travel and Tourism Strategy

May 2014

Presidential Memorandum on Travel & Tourism: Entry efficiencies

December 2014

Brand USA Reauthorized for Federal Funding through 2020

The Next and Most Important Stage in Our Evolution:
The Reauthorization of Brand USA by September 30, 2020

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

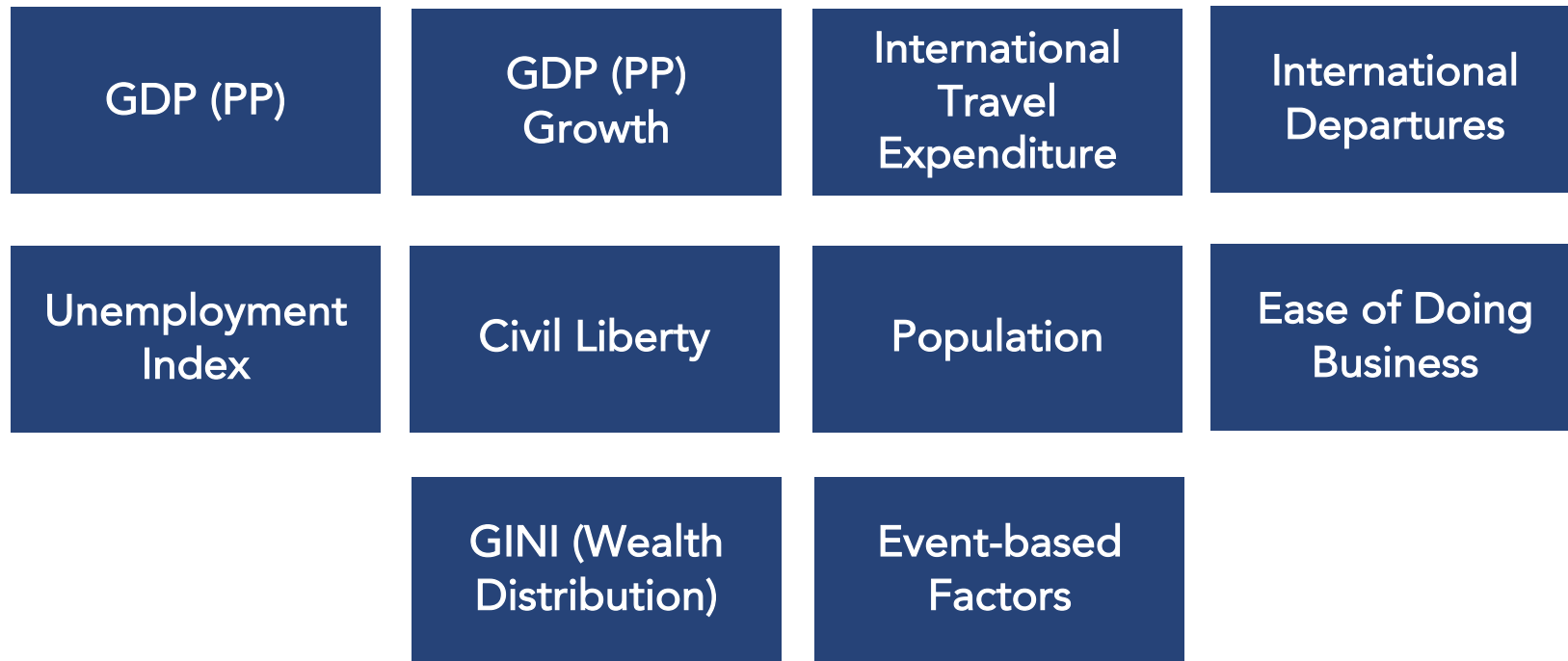


\$47.7 billion
total economic
impact



Targeting the Right Markets

To help us determine our target markets, we consider the following 10 factors:



Brand USA Target Markets 2019

China

Tier 1 Fully Customized:

Build inspiration to make the USA top of the consideration set and part of the water cooler conversation. Leverage search, inspiration & consideration media, social Ads, macro influencers. Needs contingency plan.

Brazil, India,
France, Korea

Tier 2 Cultural Relevance:

Shift destination consideration by enhancing cultural relevance; leverage search, consideration media, social ads, macro influencers.

Australia, Canada,
Germany, Japan, Mexico, United
Kingdom

Tier 3 Localized Global Approach:

Maintain USA as part of consideration set through global campaigns, partner programs, and Brand USA Originals; leverage search, activation media, influencers.

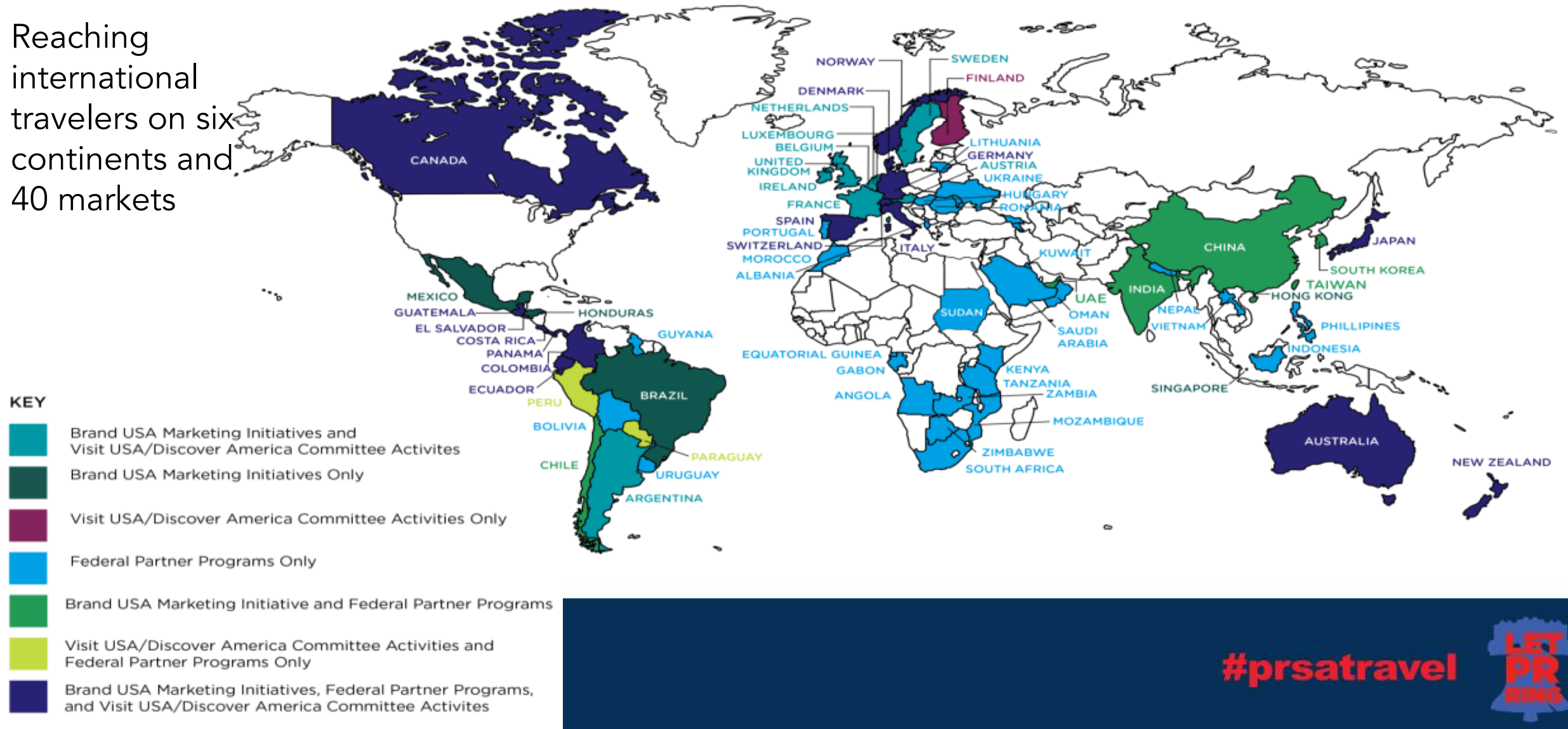
Chile, Colombia, Sweden

Tier 4 Hand Raisers:

Drive consumers actively seeking USA travel content to the website; leverage base level SEM.

Brand USA's Marketing Reach Has Expanded Significantly Since Our Founding in 2010

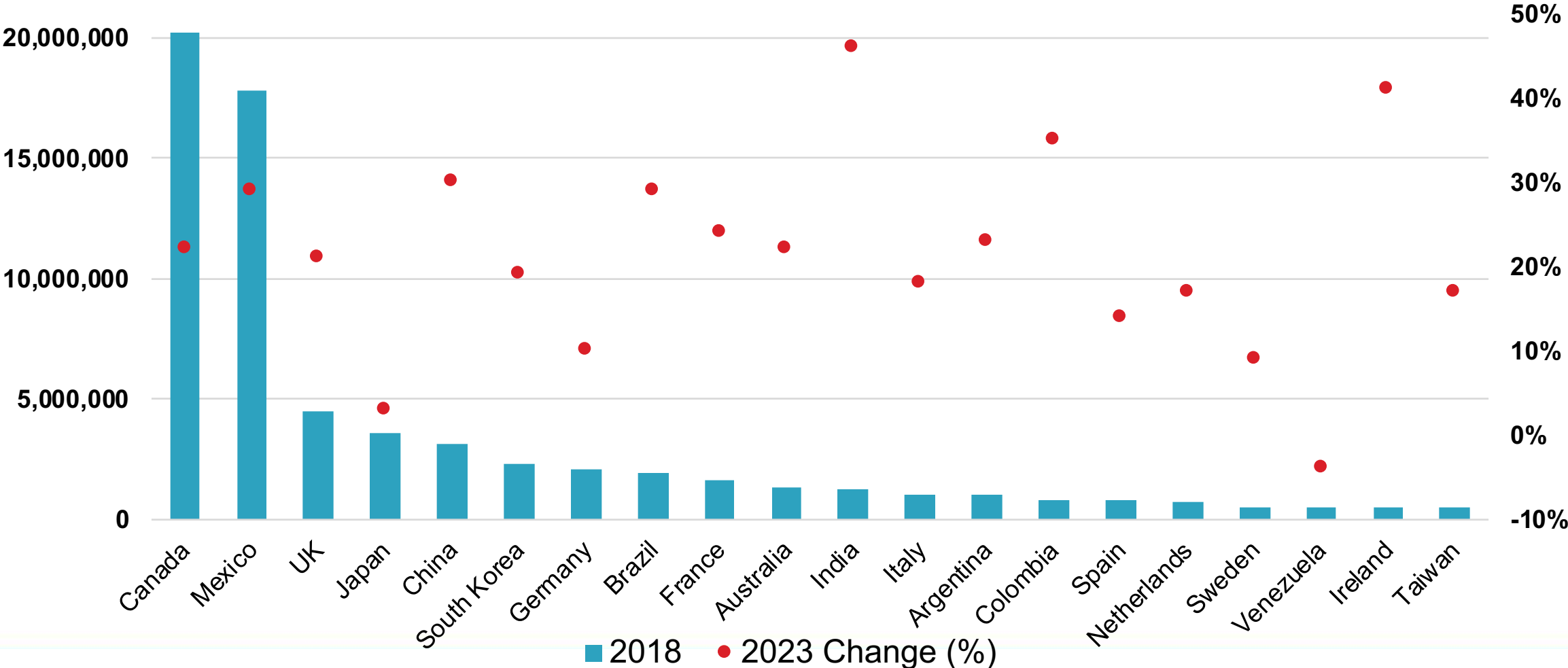
Reaching international travelers on six continents and 40 markets



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2018 U.S. Arrivals and 2023/2018 Change (%)



These 20 markets comprised 66 million (86%) of all arrivals to the USA in 2017 and will account for 15 million more visitors to the USA from 2018 to 2023 (23% growth)

Source: US Department of Commerce-NTTO

Influencing Overseas Travelers

Align your strategies to the appropriate stage of the travel lifecycle in each market.



Selecting the Best Media Channels

Tailor channel selection to the market in order to drive the highest level of awareness, engagement, and activation

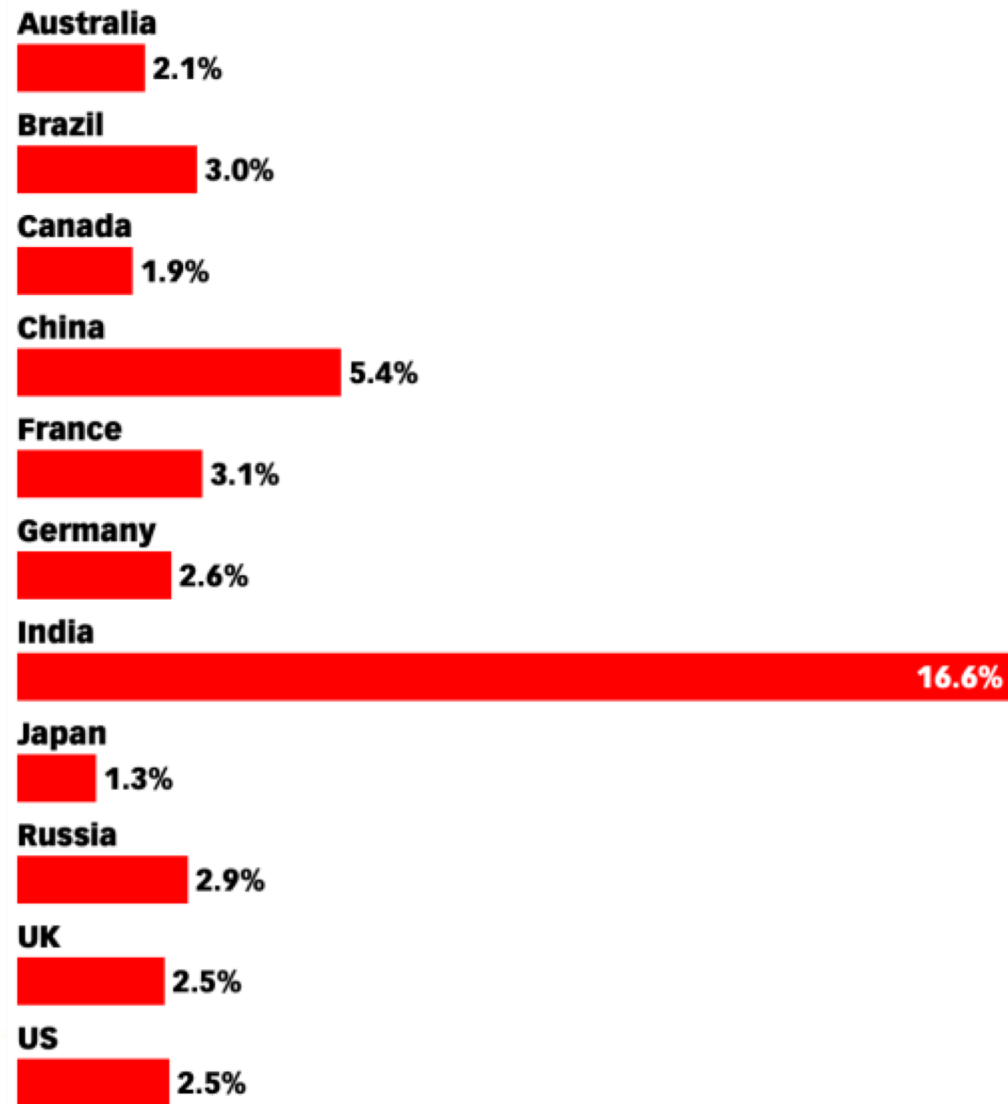
Integration of marketing and public relations efforts is critical



Digital video viewing-- already one of the top digital activities worldwide - continues to grow, driven by expanding mobile usage and improving broadband connections.

Digital Video Viewer Growth Worldwide, by Country

2019, % change



Source: eMarketer, March 2019

Targeting Travelers in India



- **1.37 billion people (2nd largest population in the world)**
- **65% of India's population is under 35-years old**
- 35% of population is urban
- Approx. 250K Indians make more than \$1M a year (ranks third highest country in number of billionaires)
- 18% of traveling population prefer international destinations
- DMOs have tapped into local interests around Bollywood, cricket, and cooking



- **500 million Internet users (2nd highest number of users in the world)**
- Expected 730 million internet users by 2020; 3X growth in smart phone users



- **22 official languages**
- **12% speak English (highest English speaking population outside of the USA)**
- Gujarati and Punjabi-speaking audiences are most likely to prioritize travel to USA
- Hindi-speaking audience is keen to explore
- Pan-India campaigns in English; targeted local campaigns in key regions in regional language

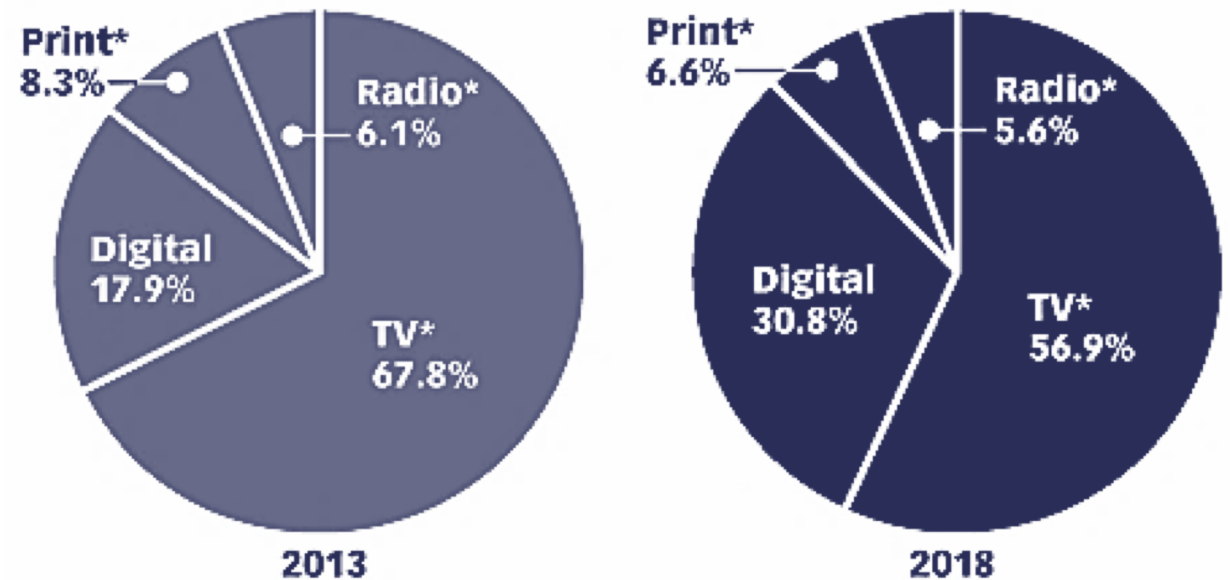


- **Expected to be the third-largest Aviation market by 2020**
- 20 cities will have 2 airports by 2030; 1,000 new aircrafts are being ordered in the next 7-8 years

Media Consumption in India

- Traditional media: TV and print consumes 70% of time
- TV is #1 and Digital #2
- Print, Radio, OOH, and cinema – best local
- On-line video and streaming television - very important

Share of Average Time Spent per Day with Major Media by Adults in India, 2013 & 2018
% of total



Source: eMarketer, June 2018

The Challenges

1. The competition for global travelers is more intense than ever
2. The channels to reach them are growing exponentially

How Do You Break through the Noise?

Storytelling



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).



Brand USA Mega Media Venture

The Message: What are People Talking about Right Now?

- Unexpected Experiences and Places
- Personalization
- Politics and Place
- Price
- Accessibility
- Sustainability
- Privacy



Brand USA Mega Media Venture

Brand USA Core Storytelling Campaigns

Ask A Local



United Stories



Hear The Music





UNITED STORIES





UNITED STORIES

Screen Strategy & Storytelling Platforms



Mobile



Laptop/Desktop



Smart TV



Digital OOH



Giant Screen

From mobile to giant screen and everything in between

Our strategy is to reach the world's travelers
on the channels that best meet their needs

On the Go



Lean In



Lean Back





Behavior vs. Sentiment



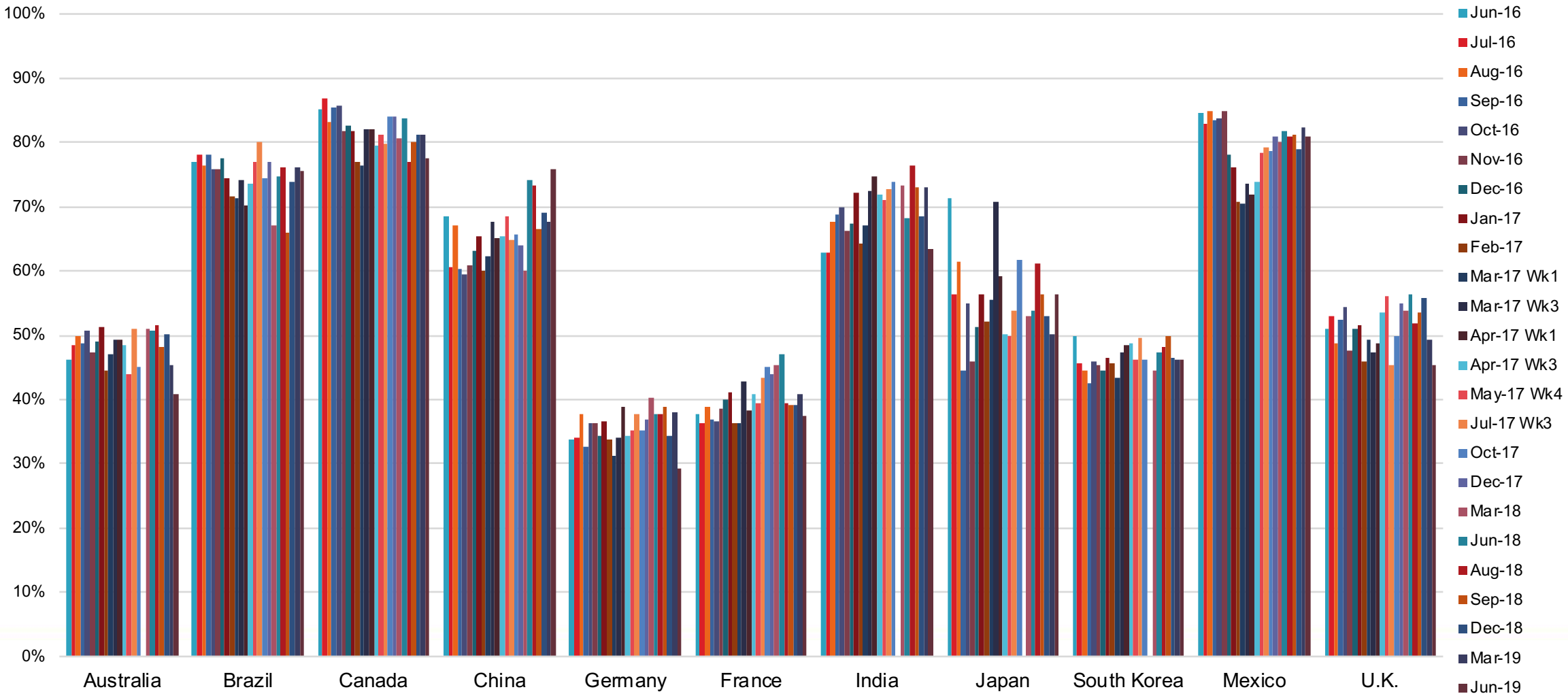
Commercial Opportunity



Messaging/Channel Strategy

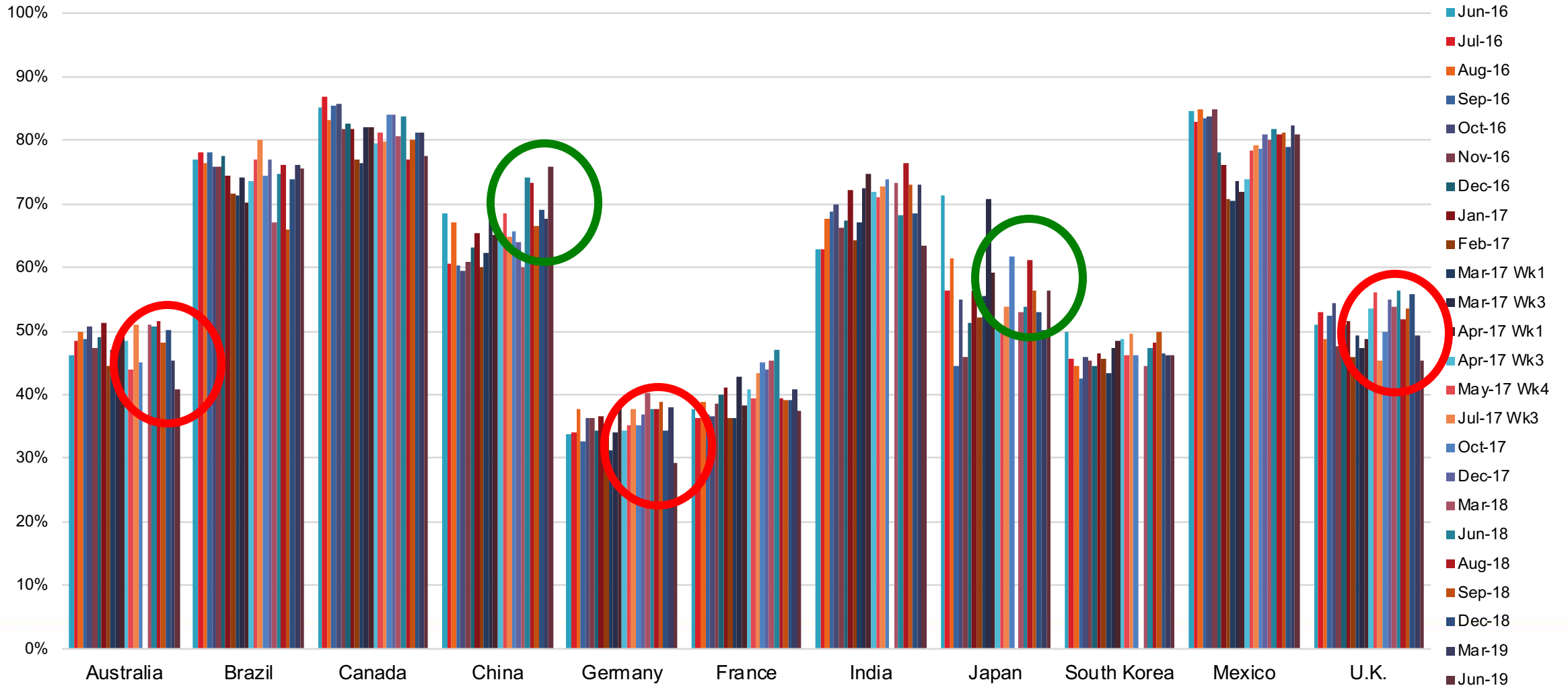


Likely to Visit the US in the Next Two Years



Source: ORC, custom study

Likely to Visit the US in the Next Two Years



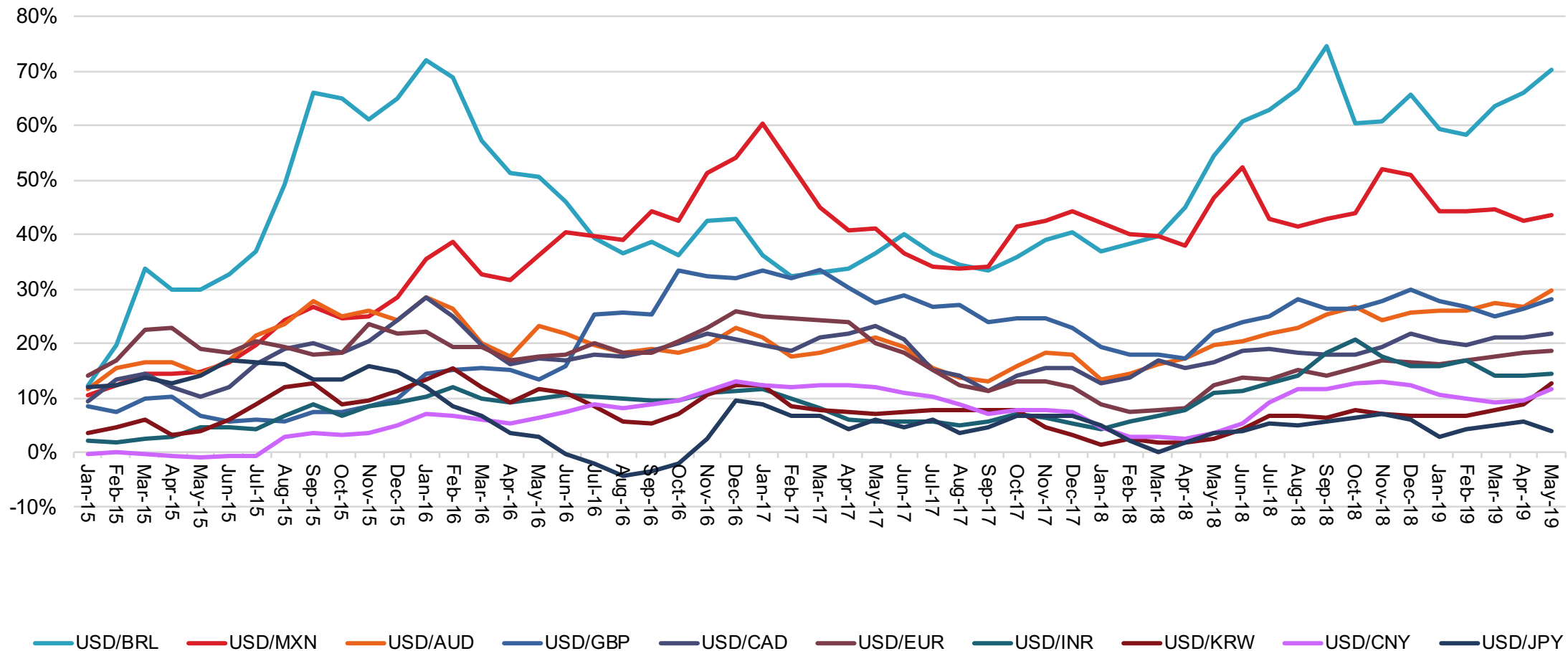
The Biggest Challenge
(right now)

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(right now)

The Strength of the U.S. Dollar



Currency Exchange Rates (2014 Index)



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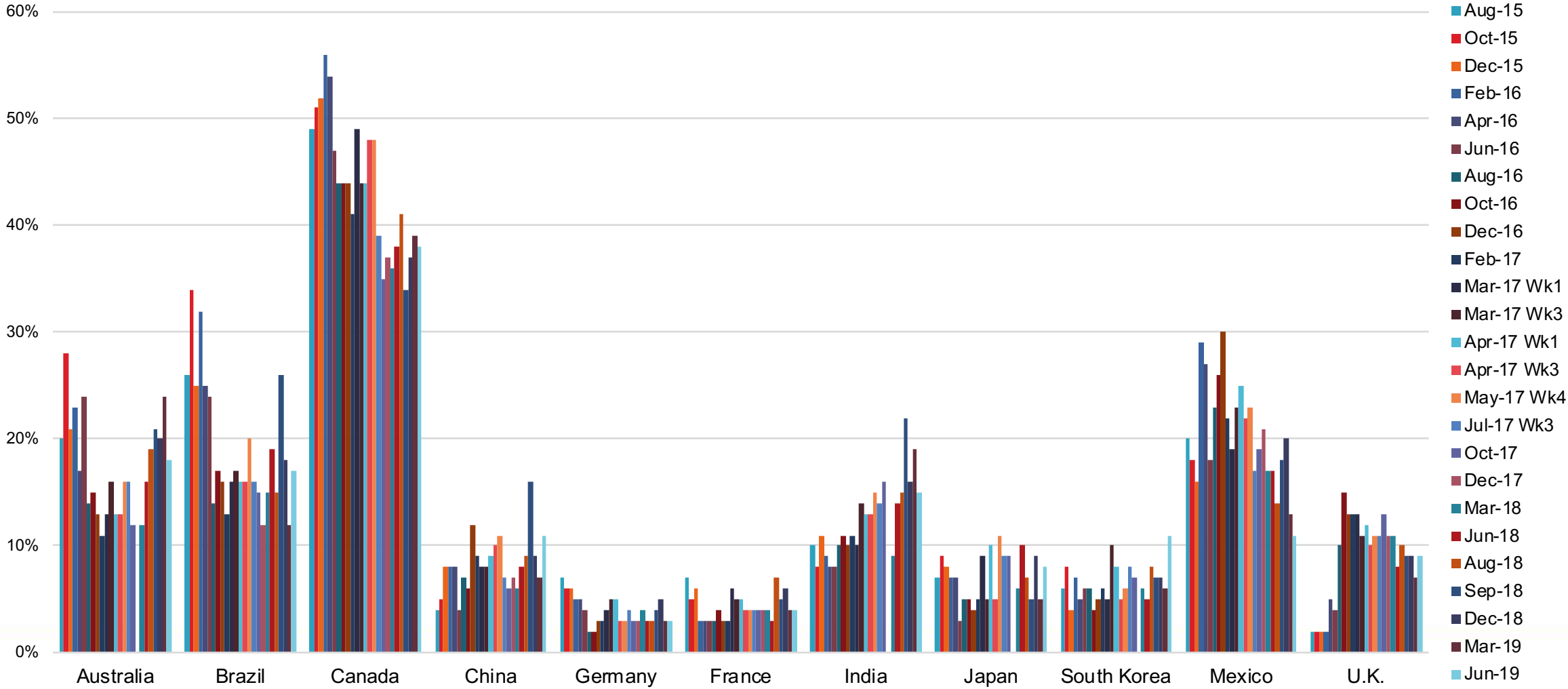
Source: Oanda

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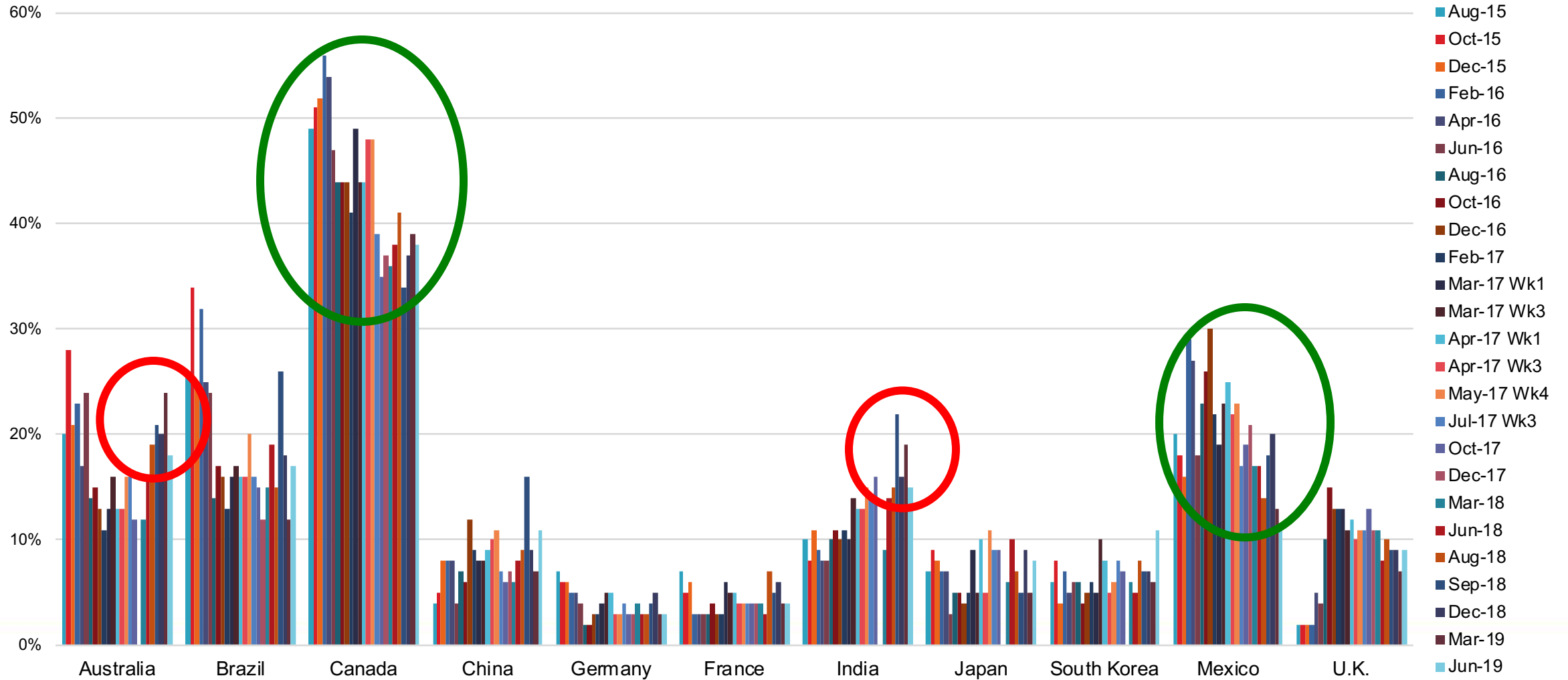


Currency Exchange as Reason for Not Visiting USA (among those not planning to visit)



Source: ORC, custom study

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



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

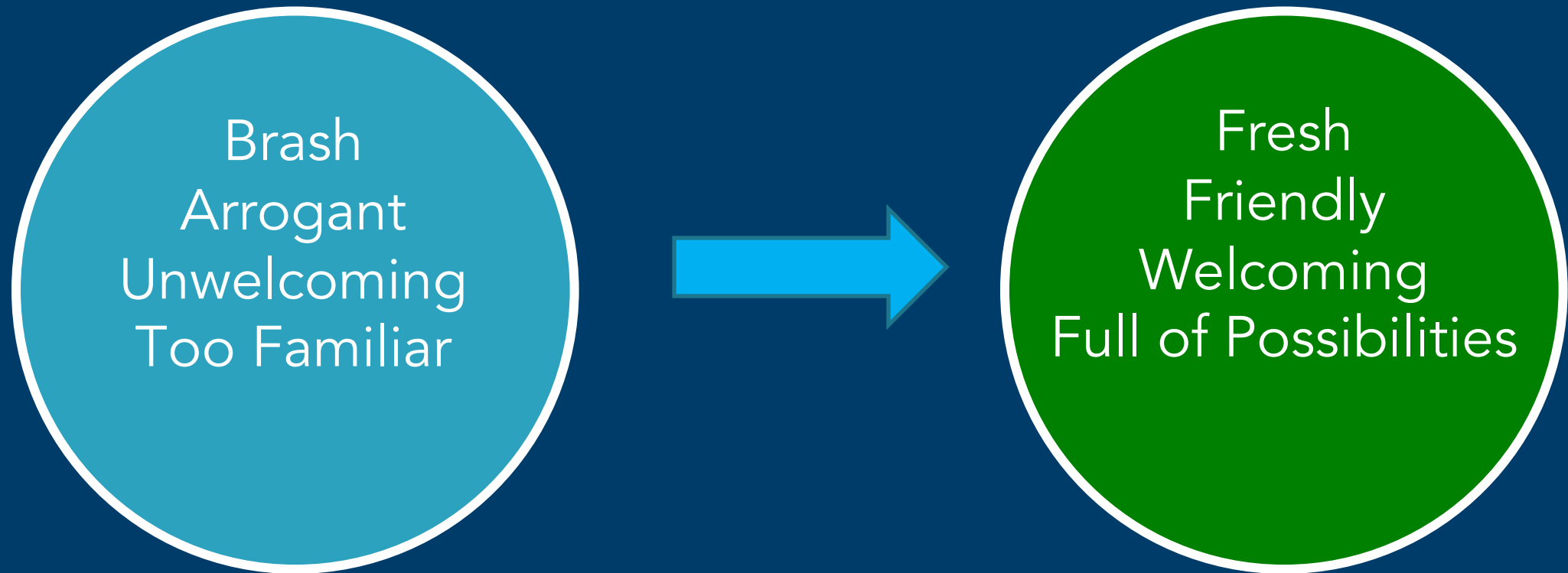
The proximity of the USA's diverse and authentic travel experiences (to, through, and beyond the gateways) provides travelers more value in a single visit than any other destination in the world.

The Evergreen Challenge:

The Evergreen Challenge:

The Power of Perception vs Reality

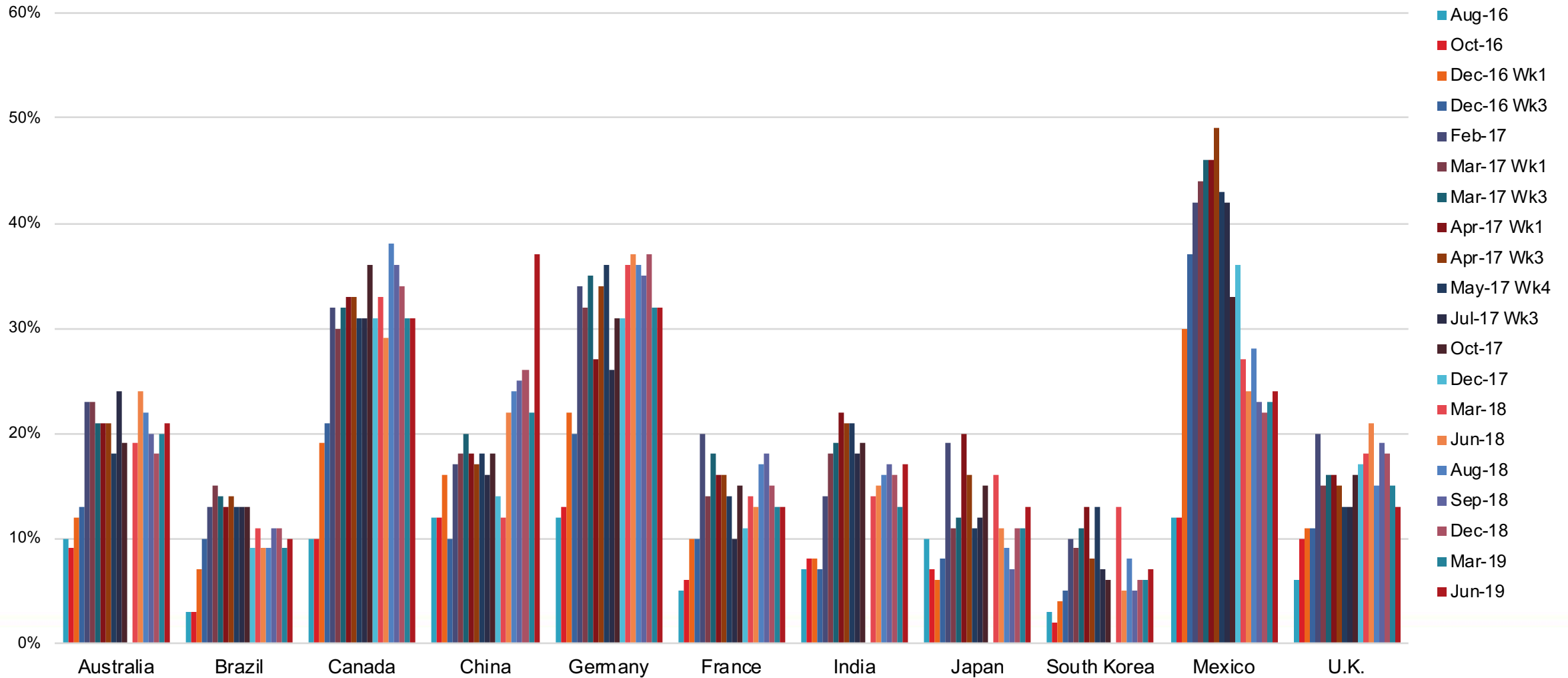
We are in a constant state of motion.... Shifting Perception to Reality



In order to reignite interest in America, we would need to show that:

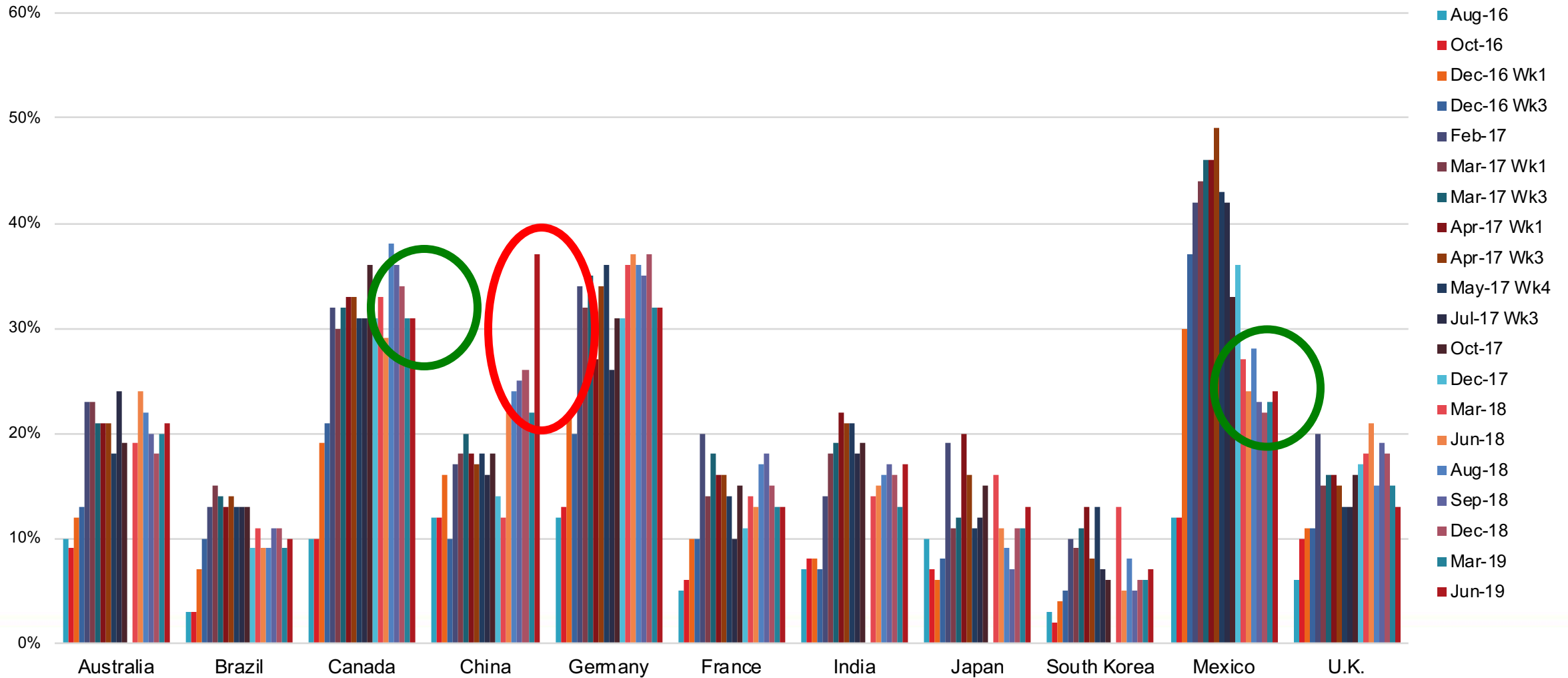
- There's more to America than meets the eye
- We really are welcoming to all
- There are fresh and unexpected discoveries awaiting

Political Climate 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

The public will believe a simple lie
over a complex truth.

-Alexis de Tocqueville-

We needed to get to the simple truth
in order to cut through the noise.

And the simple truth is...

Travel Transcends Politics



**WITH A TRANSITION
TO A NEW ADMINISTRATION**

NIK

THE 7 CO
CHOSEN



Thank You!

Like/Follow/Share

Consumer

VisitTheUSA.com



[VisitTheUSA](http://VisitTheUSA.com)

GoUSA.tv

Travel Industry

TheBrandUSA.com



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