



South Dakota Governor's Conference

January 17, 2019





TRAVEL FUELS THE ECONOMY



Travel Powers the Economy

#1 Services Export

- 76.9 million international visitors spent \$156 billion
- \$77 billion U.S. travel trade surplus
- \$251 billion U.S. travel exports
- 26% of U.S. service exports – 9% of all U.S. exports

2.6% of GDP

- \$2.4 trillion in economic output
- \$164.7 billion in tax revenue

15.6 Million Jobs Supported by Travel

- 8.8 million direct; 6.8 million indirect
- Top 10 employer in 49 states and DC
- 1.2 million jobs directly supported by international travelers



South Dakota – Travel Impact

13.9

million visitors

\$3.88

billion in total
visitor spending

\$291

million in
tax revenue

TAX

53,894

jobs supported



Brand USA



The Travel & Tourism Landscape in Washington, DC



Industry Defining Moments



Brand USA: Statement of Purpose

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



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

**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

How We Market the USA



**Global Consumer
Campaigns**



**Travel Media & Trade
Outreach**



**Cooperative
Marketing Programs**

Where We Market the USA

China

India

France

South
Korea

Brazil

Australia

Canada

Germany

Japan

Mexico

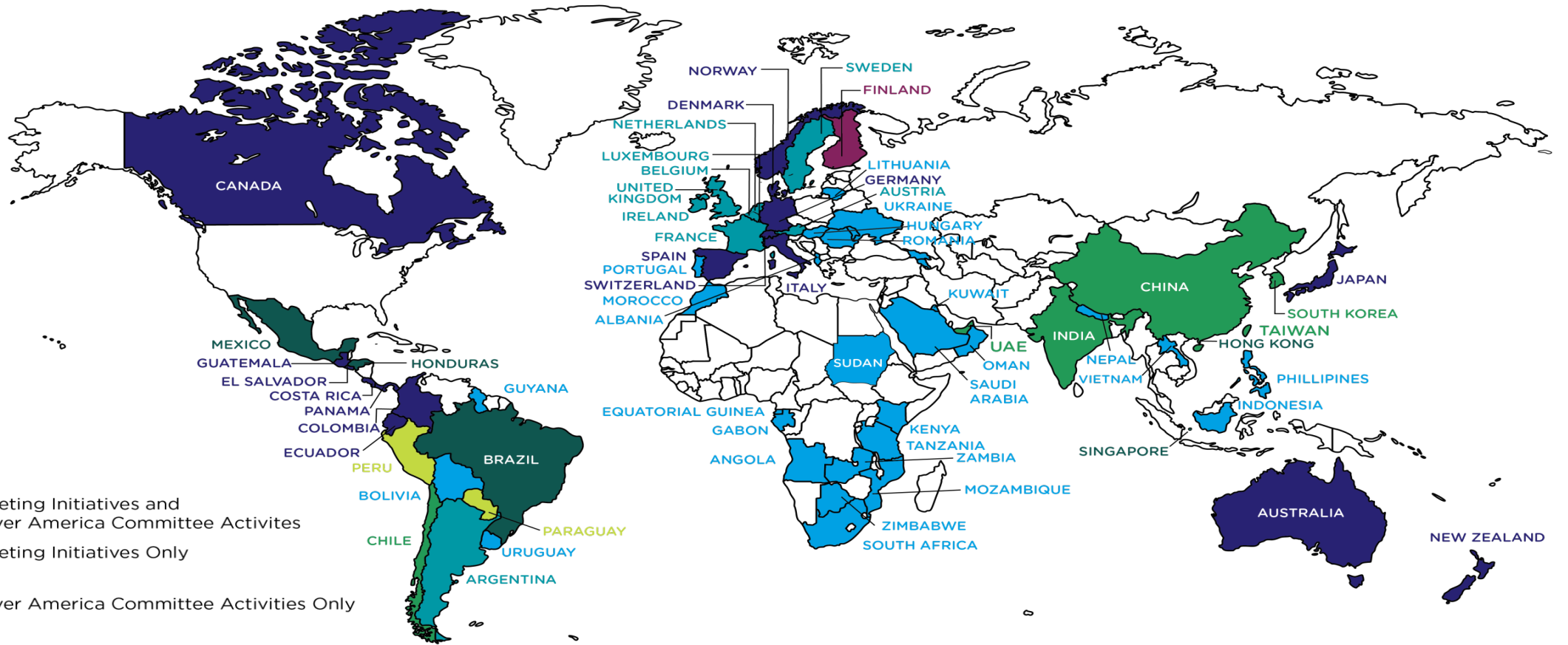
UK

Chile

Colombia

Sweden

Brand USA Around the World



KEY

- 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 Activities

Over the past five years, Brand USA's marketing initiatives have generated

5.4 million
incremental visitors

\$17.7 billion
in incremental spending

more than
51,000
incremental jobs
supported each year

federal, state, & local taxes

\$5 billion

\$38.4 billion in total economic impact

more than
800
partners since
our founding



94%

partner program
retention rate in FY2017

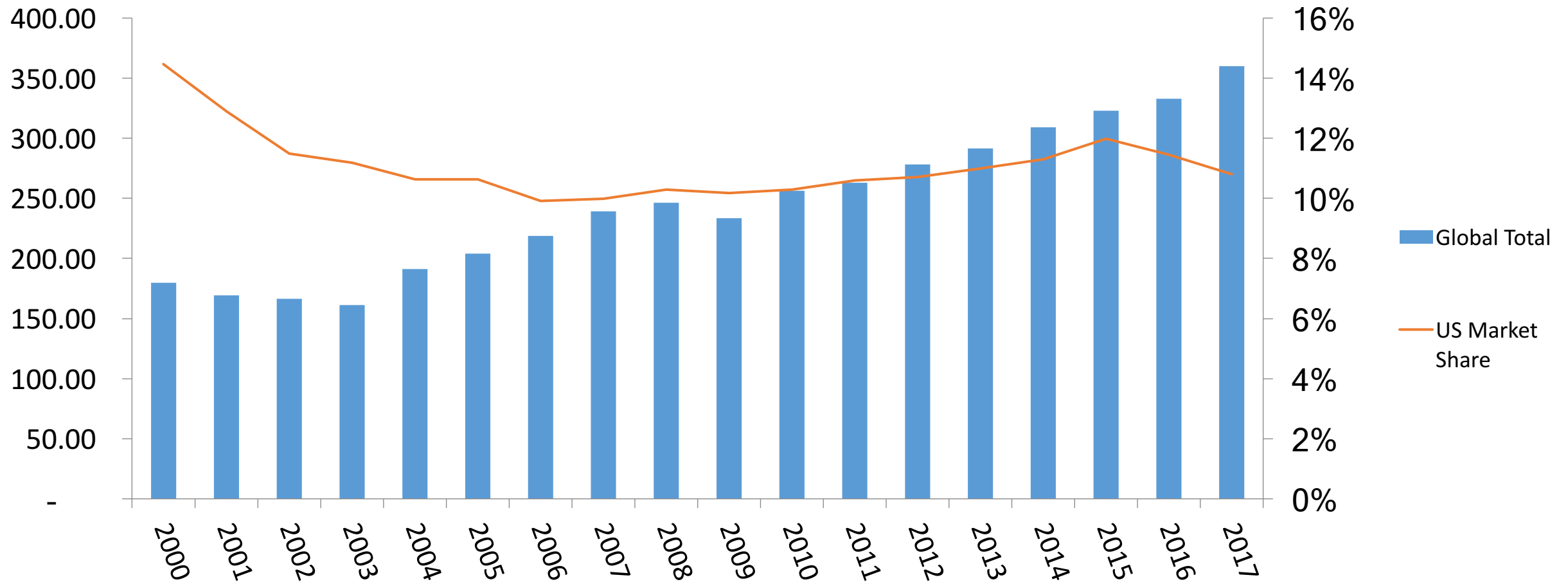


Challenges & Opportunities

USA
VisitTheUSA.com

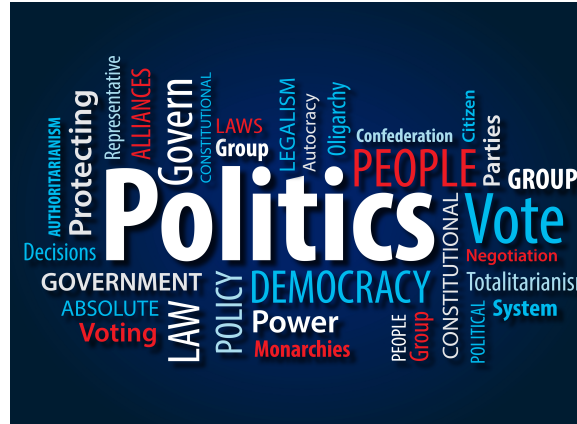
Brand USA

Global Long Haul Trips and US Market Share



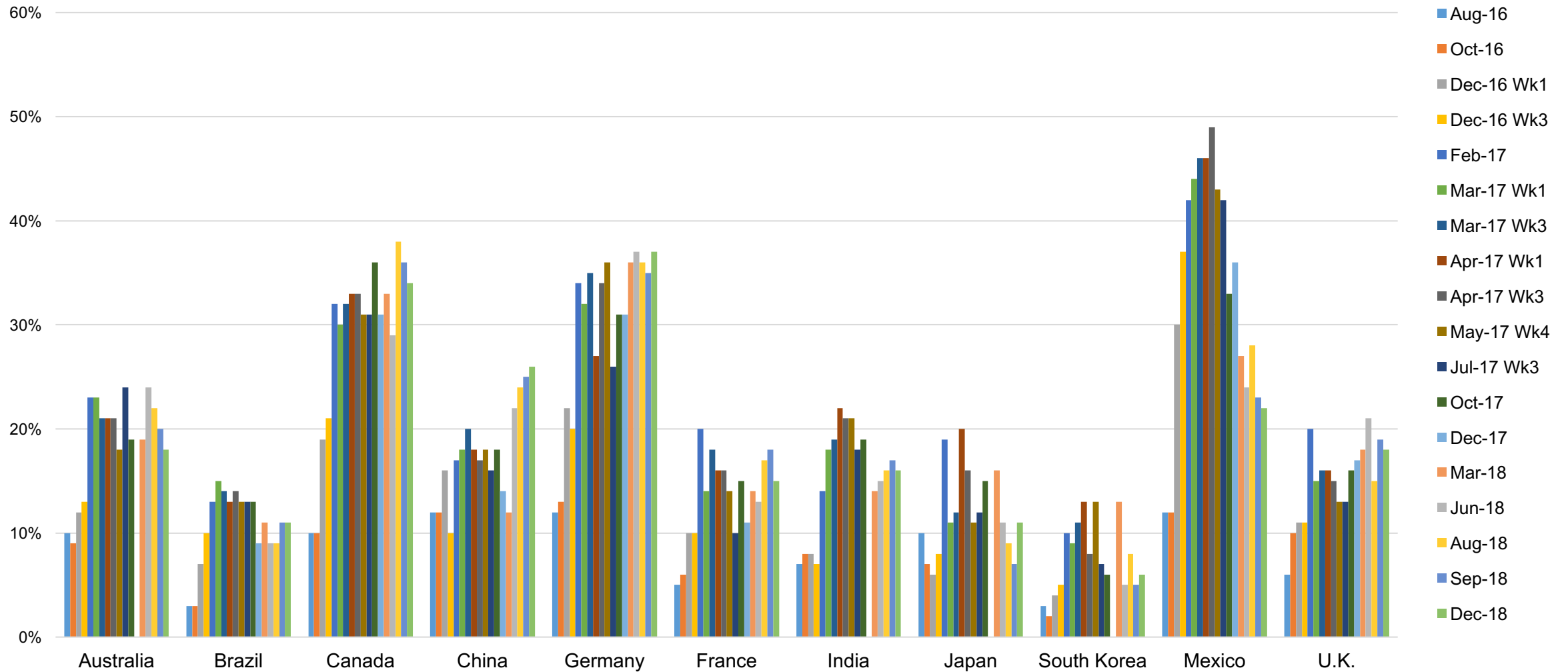
Note: Visitation in millions and US Overseas Market Share
Source: NTTO, Oxford Economics

Key Factors Driving Inbound Visitation



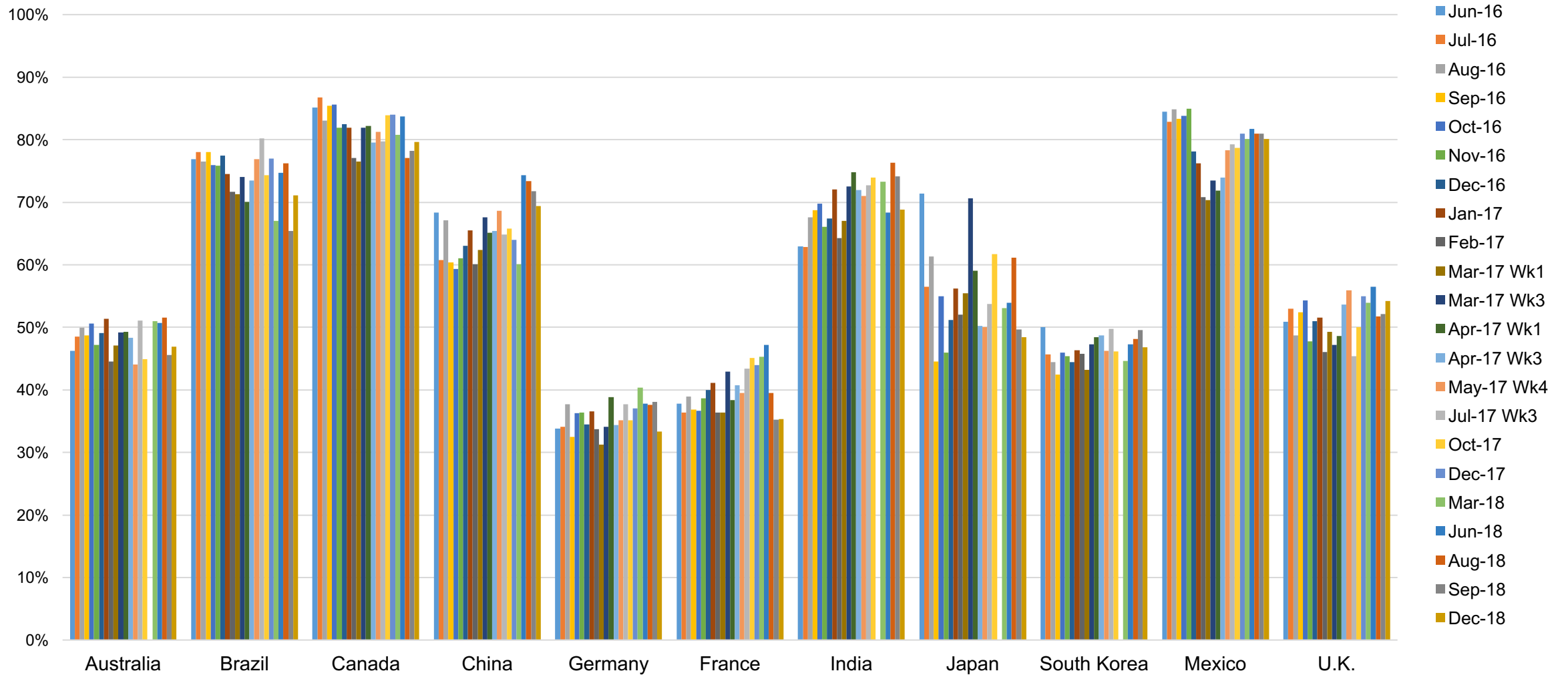
Political Climate as Reason for Not Visiting USA

(Among those not planning to visit)



Source: ORC, custom study

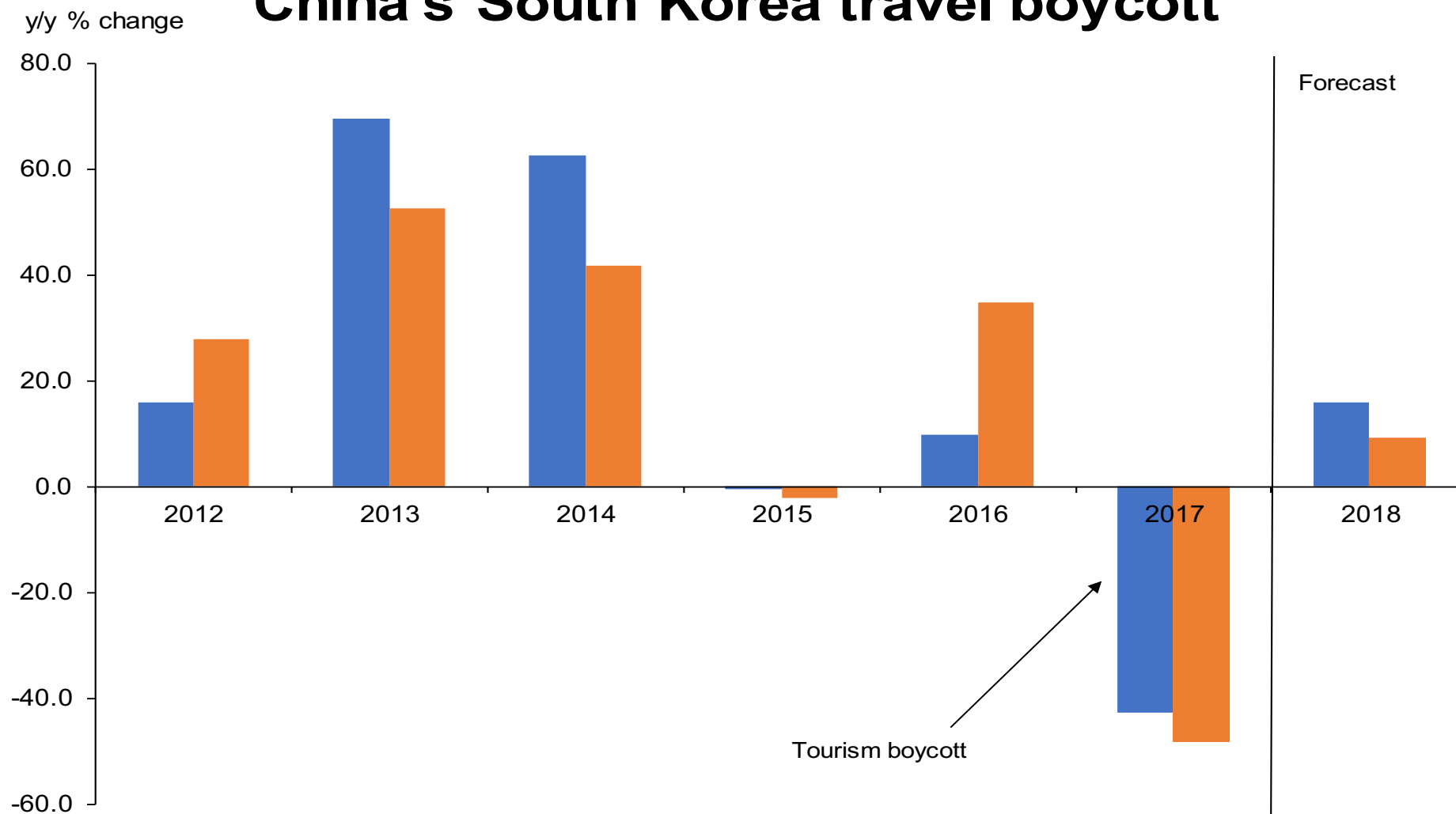
Likely to Visit the US in the Next Two Years





Impact of China's South Korea Travel Boycott

Spending and arrivals before and after China's South Korea travel boycott







THE WORLD FEELS WELCOME



BRAND USA IMPACT ON U.S. TOURISM

- ▶ 4.3 million visitors to the USA
- ▶ \$29 billion in total economic impact
- ▶ 51,000 incremental jobs a year
- ▶ Economy saw avg \$27 per \$1 spent

MORNINGS with MARIA
@MorningsMaria
FOX BUSINESS NETWORK
f t i p @FOXBUSINESS



Travel Transcends Politics



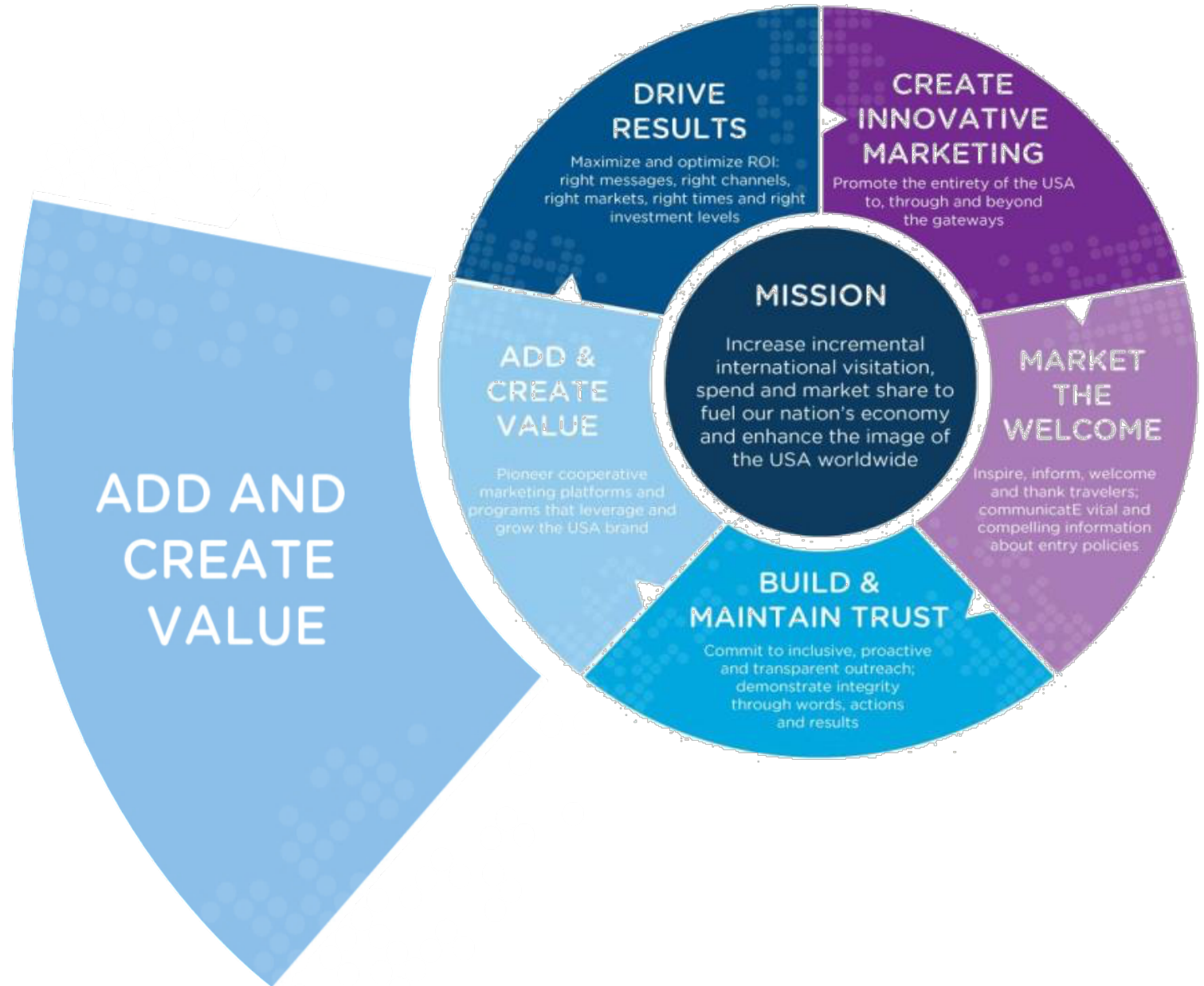
Value Proposition

USA

VisitTheUSA.com

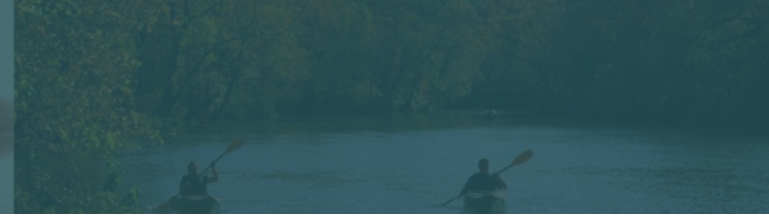
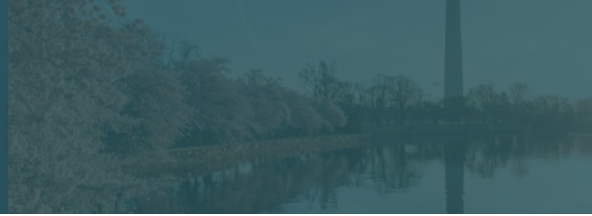
Brand USA

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





Brand USA's Role





Storytelling Using Creative & Innovative Marketing

Global Positioning Statement

Our content strategy will focus on curating individual voices that each express a particular point of view, to enable us to...

Give a voice to **real** travel **experiences** within the USA

Create urgency and provoke “**travel dreaming**” by highlighting first person perspectives of locals, expert influencers and travelers alike.

Open access and **lends authenticity** to our communications, as well as creating a sense that there are many United States

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

...and in so doing, achieve more organic, authentic, locally relevant, positive and cost effective engagements with consumers.

The Many Voices Platform

Many Voices

is a social media and content communications platform which aims to create more meaningful connections with potential travelers, stimulating curiosity and wanderlust by leveraging a collection of voices which define the story of the USA.

We are the USA. A collection of places, of experiences whose spirit is found in its diverse range of people. We aim to guide you, to show you that **behind every landscape, big city and open road there are many voices who can stimulate your wanderlust.**

Who are the Many Voices?



LOCALS

A place is defined by its people, by those who have explored its culture, roads and trails like no other. They've made their mark on their community and can **welcome you, inspiring you to visit like no other.**



VISITORS

They've fulfilled their wanderlust, they've checked their bucket list and created memories which can now be used as inspiration for the next iteration of travelers from their market. To travel is to know and **the past visitor now becomes the storyteller and the evangelist for travel to the USA**



CATEGORY EXPERTS

Whether you're an aspiring explorer, reading National Geographic, dreaming of your chance to conquer the Grand Canyon, or a foodie looking for inspiration from the pages of Saveur planning your next culinary journey to LA - travelers often look to category experts to inspire their travel decisions. We will use them to **guide our community**



CREATIVE CLASS

Not everyone looks at America in the same way. Interpretations can be found in music, art, and unique takes of photography and video. We want to amplify these creative voices to **show America as it hasn't been seen before.** This creative perspective can come from locals, visitors, or category experts.

Screen Strategy & Storytelling Platforms



Mobile



Laptop/Desktop



Smart TV



Digital OOH



Giant Screen

“From mobile to giant screen and everything in between”

A cowboy wearing a red shirt, blue jeans, and a white cowboy hat is riding a white pinto horse. He is herding a large herd of bison in a field of tall, dry grass. The scene is captured from a side profile, showing the cowboy's focus on the herd.

Giant Screen Films

USA

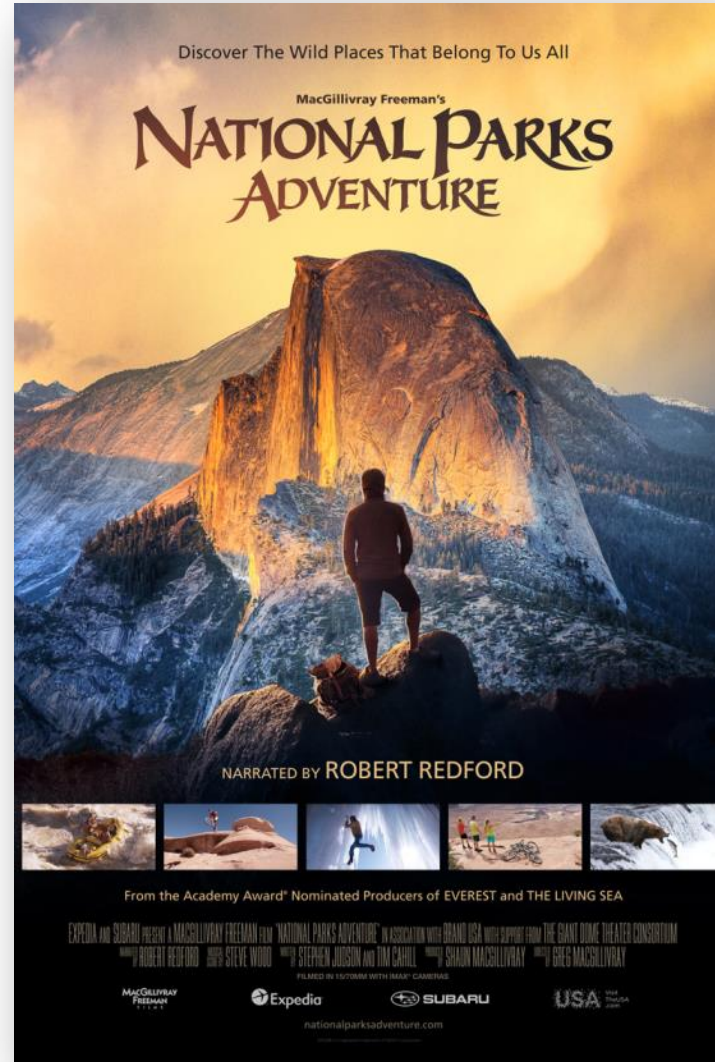
VisitTheUSA.com

Brand USA

Giant Screen Films

Aspirational

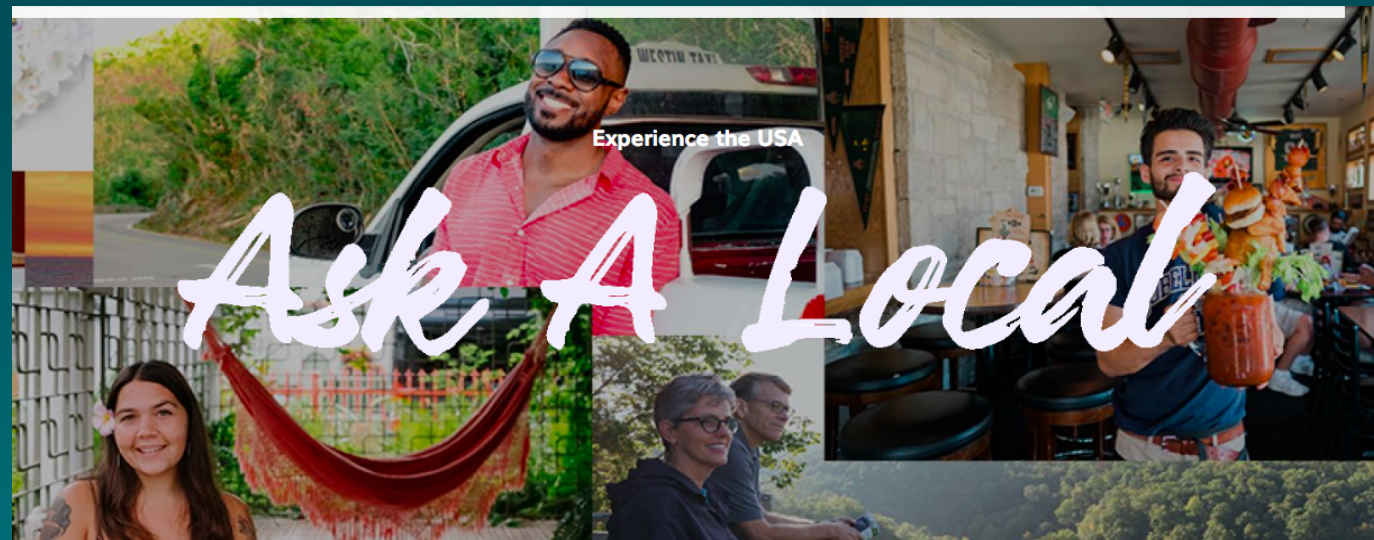
Captivating





Global Campaigns

Ask A Local



Explore all videos

From beaches to bike trails to breweries, the United States has something for everyone to explore. Hear from the locals themselves and discover the best attractions, places to eat, shopping and much more.

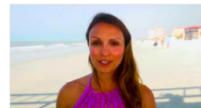
ASK A LOCAL

Brand USA's digital asset management system contains photography, video, and other resources for the promotion of travel to and within the USA. Resources are available to media, Brand USA partners, and agencies.

[Click here to learn how your destination can be featured.](#)

Search 'Ask a Local' videos...

LOCATION



I ASK A LOCAL
St. Petersburg and Clearwater,
Florida



I ASK A LOCAL
Wichita, Kansas



I ASK A LOCAL
Mall of America, Minnesota



I ASK A LOCAL
U.S. Virgin Islands



I ASK A LOCAL
Houston, Texas



I ASK A LOCAL
Black Hills, South Dakota



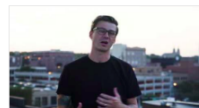
I ASK A LOCAL
Bend, Oregon



I ASK A LOCAL
Las Vegas, Nevada



I ASK A LOCAL
Miami and Key West, Florida



I ASK A LOCAL
Sioux Falls, South Dakota



I ASK A LOCAL
Portland, Oregon



I ASK A LOCAL
Oregon

WELCOME TO

Black Hills



WELCOME TO

Sioux Falls



Roku | Home

12:03 pm | Options *

Go USA

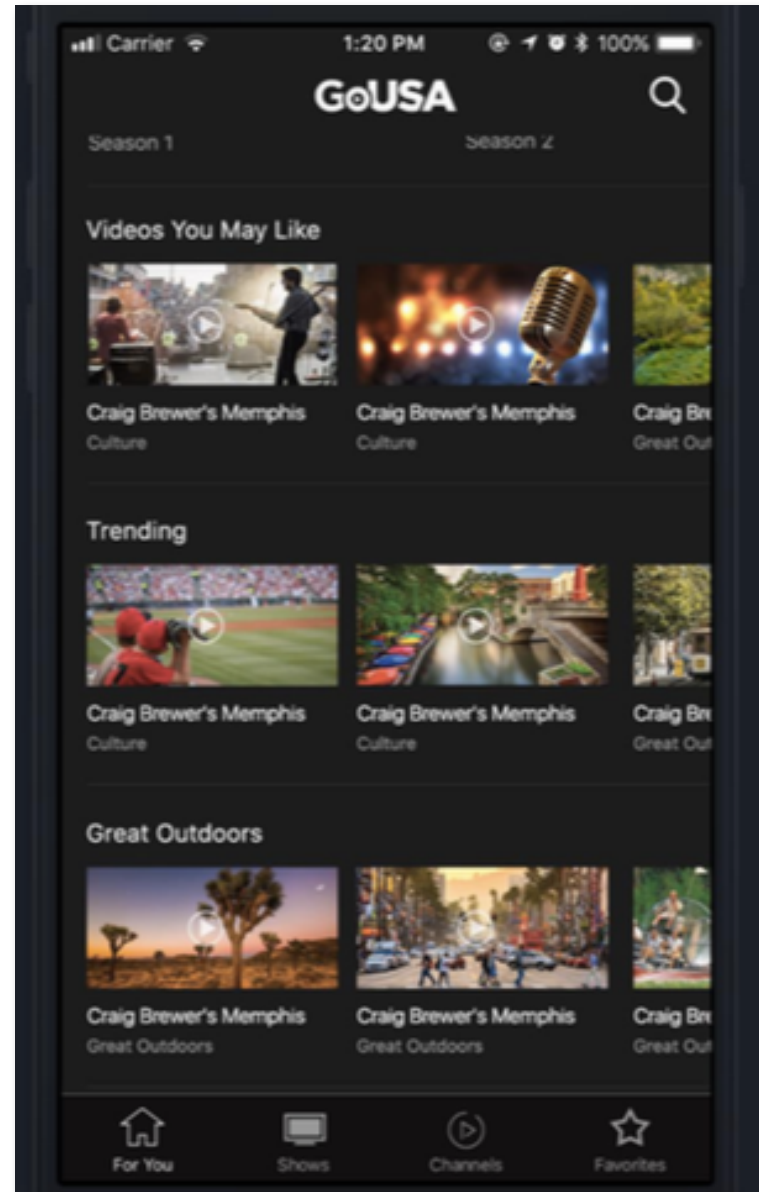
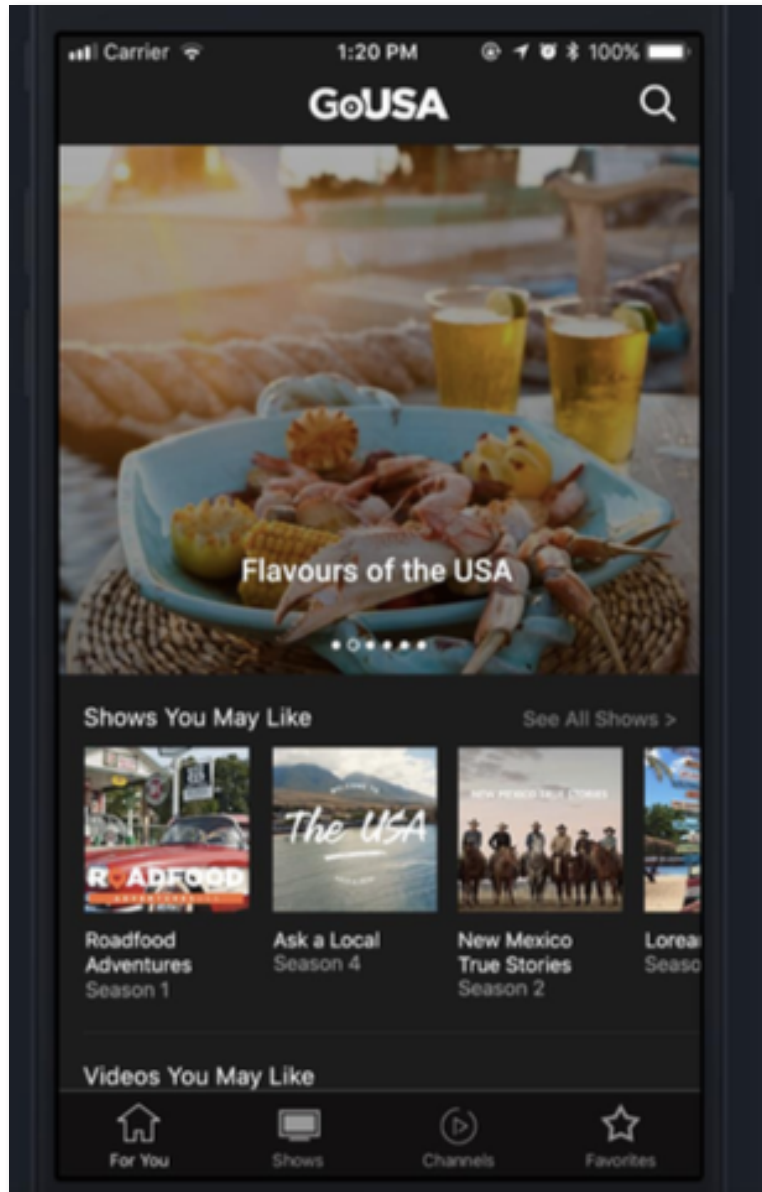
2 of 81 Channels



Go USA
Introducing GoUSA TV.
Watch It Now!

INSTALL CHANNEL

GoUSA TV Mobile App



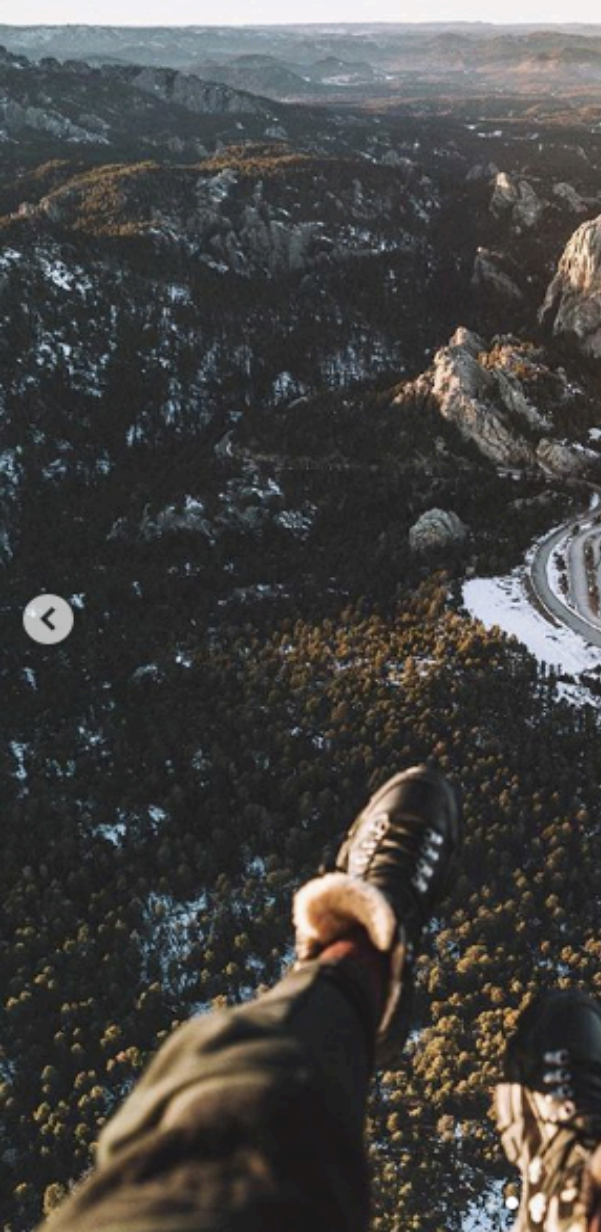
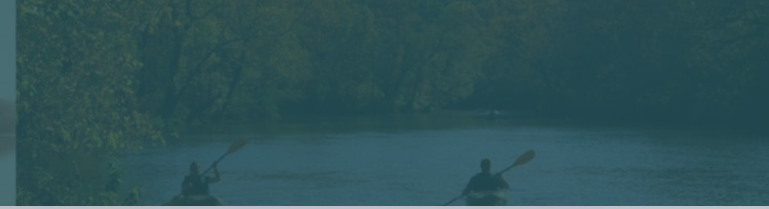
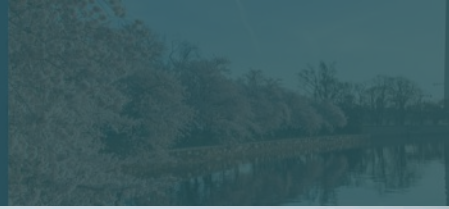


United Stories Campaign



UNITED STORIES

United Stories





 **doyoutravel**  • [Follow](#)
South Dakota


doyoutravel Made it to the Midwest! It's been an action packed crazy few days road tripping through South Dakota with [@VisitTheUsa](#) - This place has truly exceeded my expectations and inspired me to explore more of this part of the US! [#UnitedStories](#)
Shot by legend [@muenchmax](#)






 **gypsea_just**  • [Follow](#)
Custer State Park

gypsea_just Hello SOUTH DAKOTA 🇺🇸
I'm back & snuggly in a winter wonderland, thanks for bringing me to a new destination in the US [@visittheusa](#) [#UnitedStories](#)

 beautifuldestinations 7h 



We just spent the weekend starting from the center of the USA exploring South Dakota with [@visittheusa](#) launching [#unitedstories](#)





Like/Follow/Share

Travel Industry

TheBrandUSA.com



@BrandUSA



BrandUSATV



BrandUSA

Consumer

VisitTheUSA.com



@VisitTheUSA



VisitTheUSA



VisitTheUSA



VisitTheUSA



Available on Roku,
Apple TV, and
Amazon Fire

Thank You

