



# South Dakota Governor's Conference

January 17, 2019







# TRAVEL FUELS THE ECONOMY

**USA**  
VisitTheUSA.com

**Brand USA**



# 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



## 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

## 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



# 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

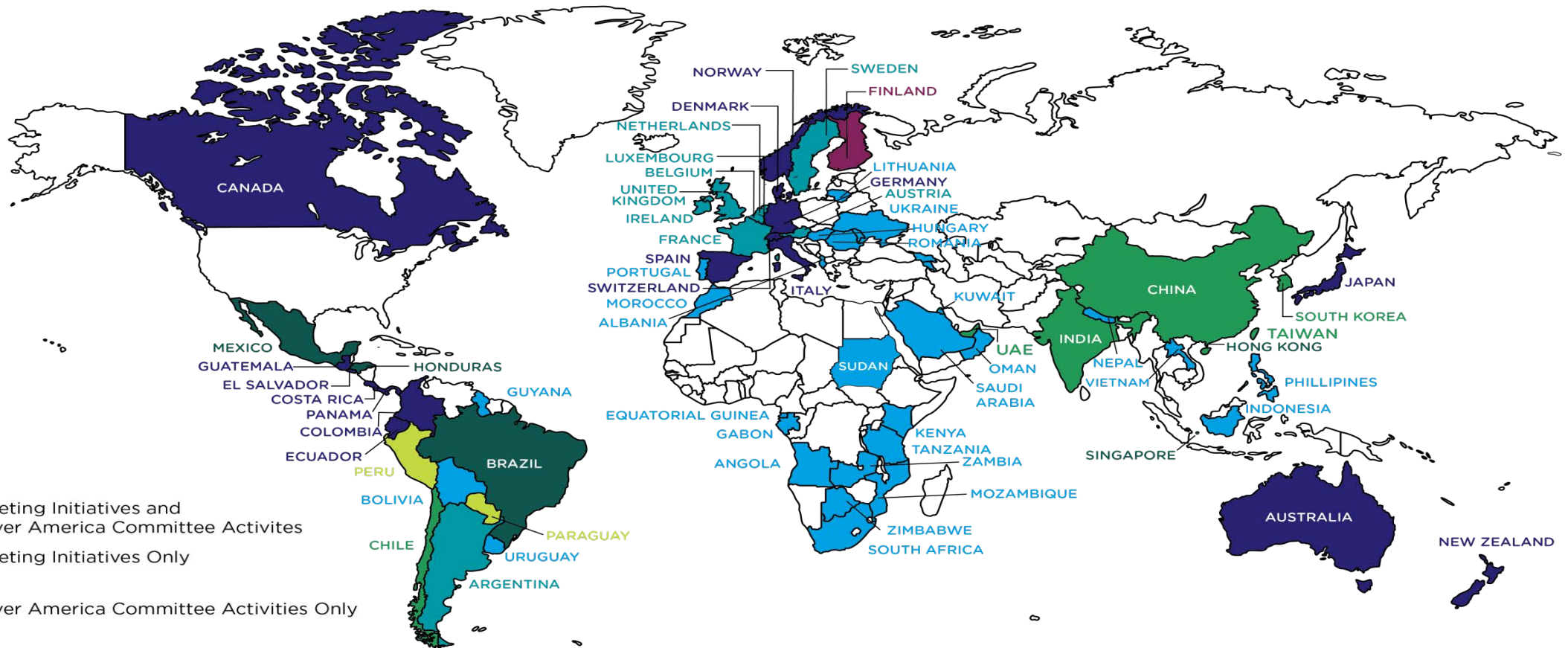
Chile

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

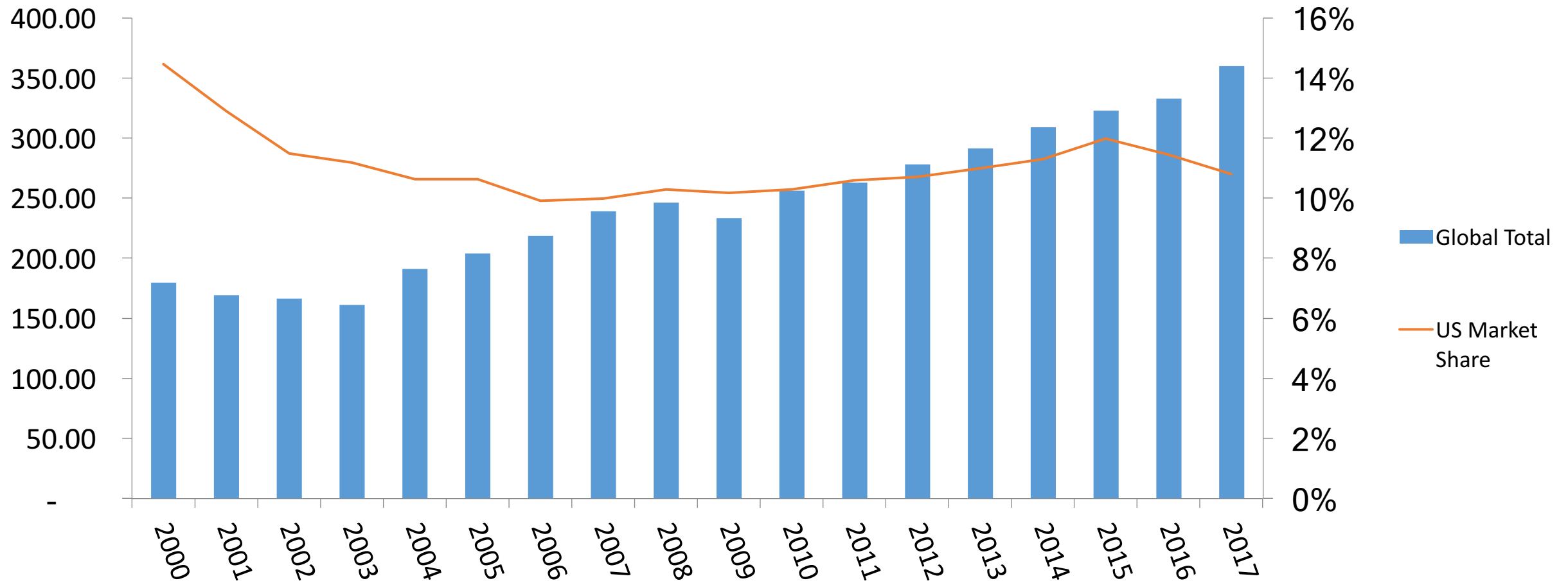




# Challenges & Opportunities



# Global Long Haul Trips and US Market Share



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

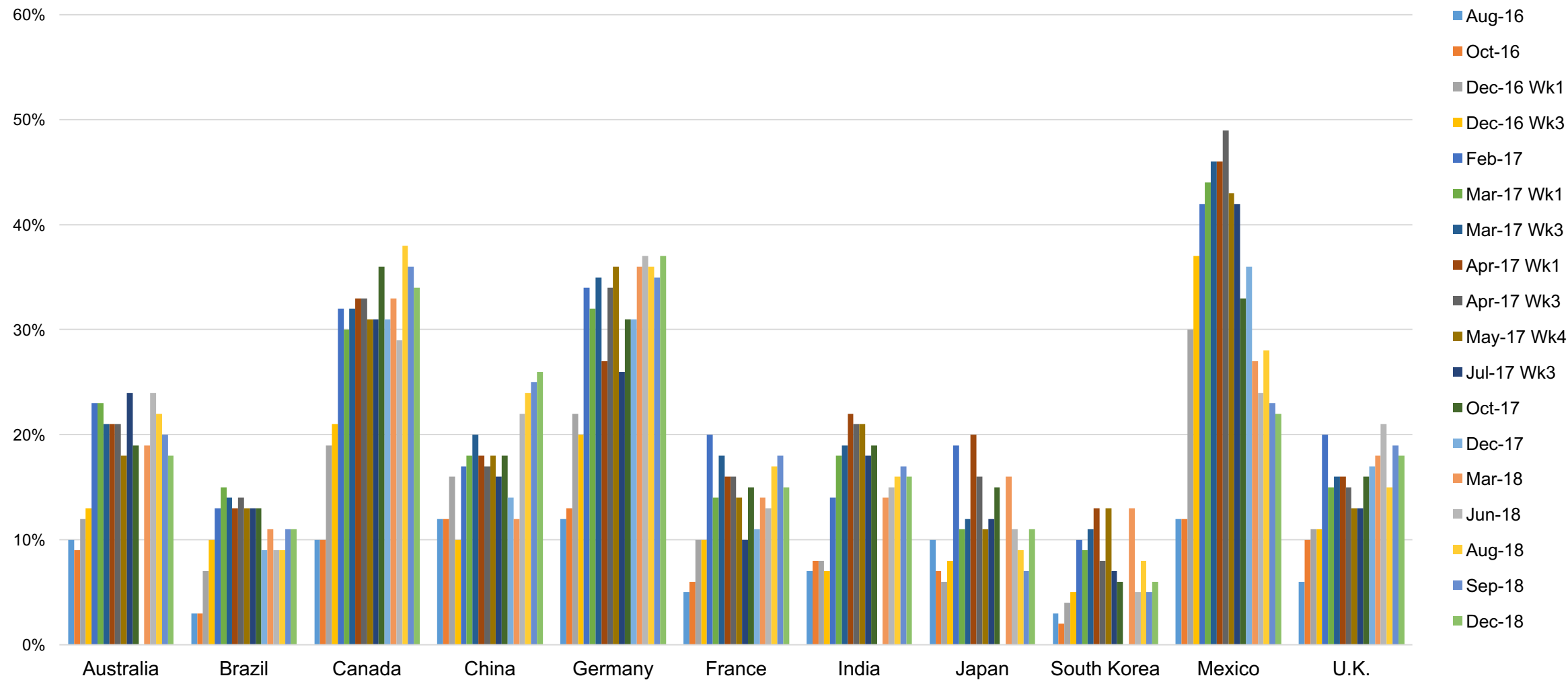
# Key Factors Driving Inbound Visitation



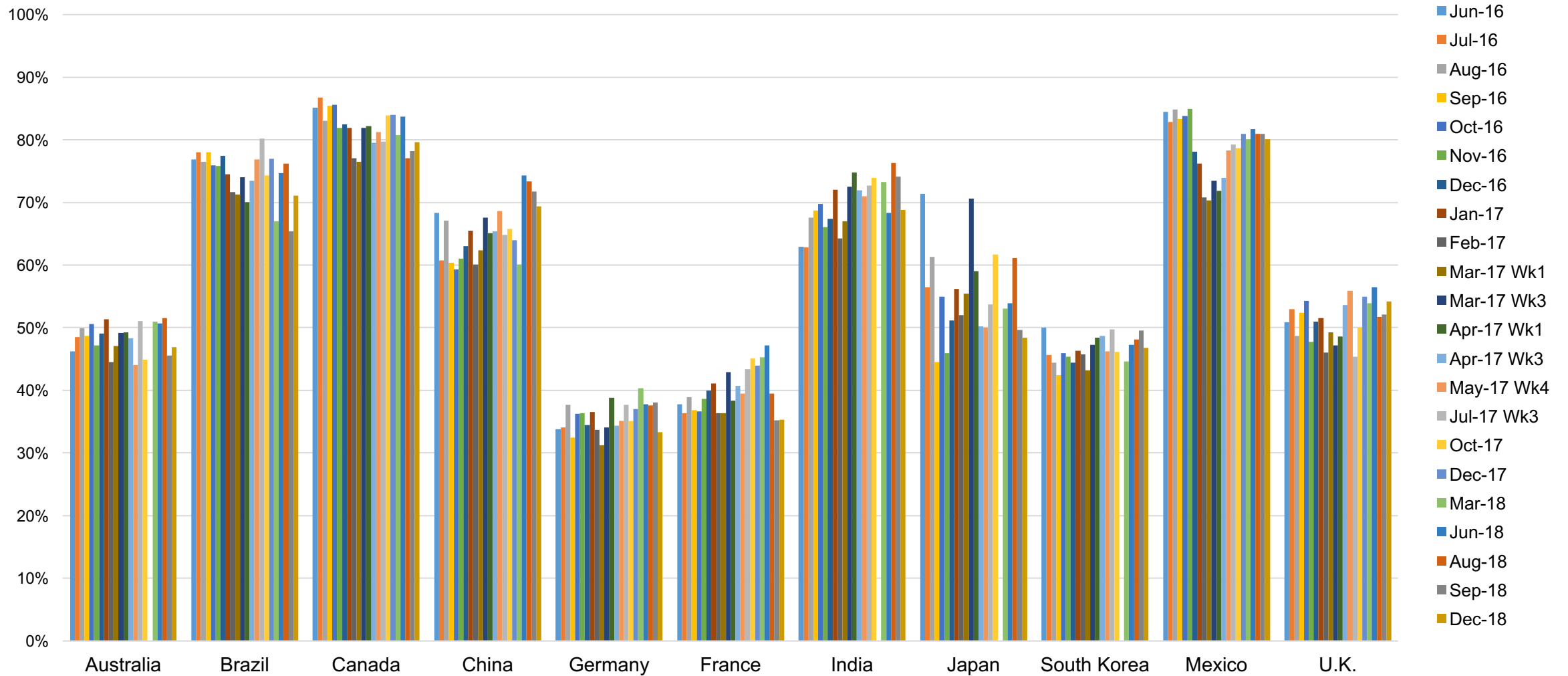


# Political Climate as Reason for Not Visiting USA

(Among those not planning to visit)



# Likely to Visit the US in the Next Two Years

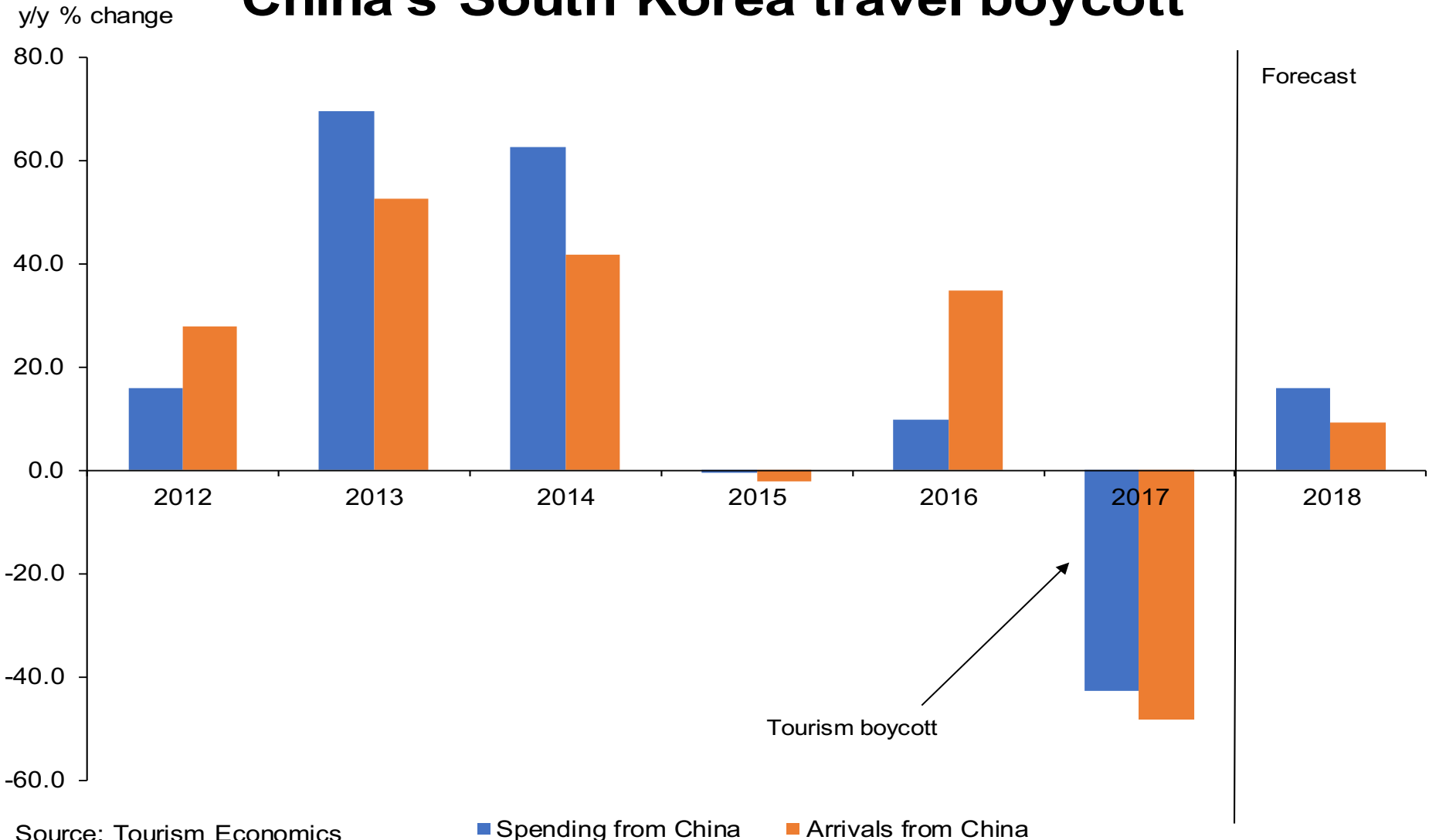






# Impact of China's South Korea Travel Boycott

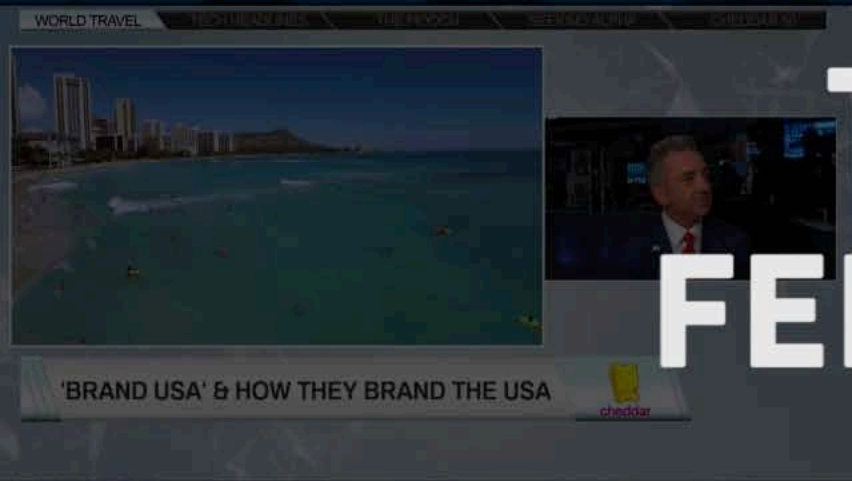
## Spending and arrivals before and after China's South Korea travel boycott











# 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

FOX MORNINGS with MARIA @MorningsMaria  
@FOXBUSINESS



**Travel Transcends Politics**

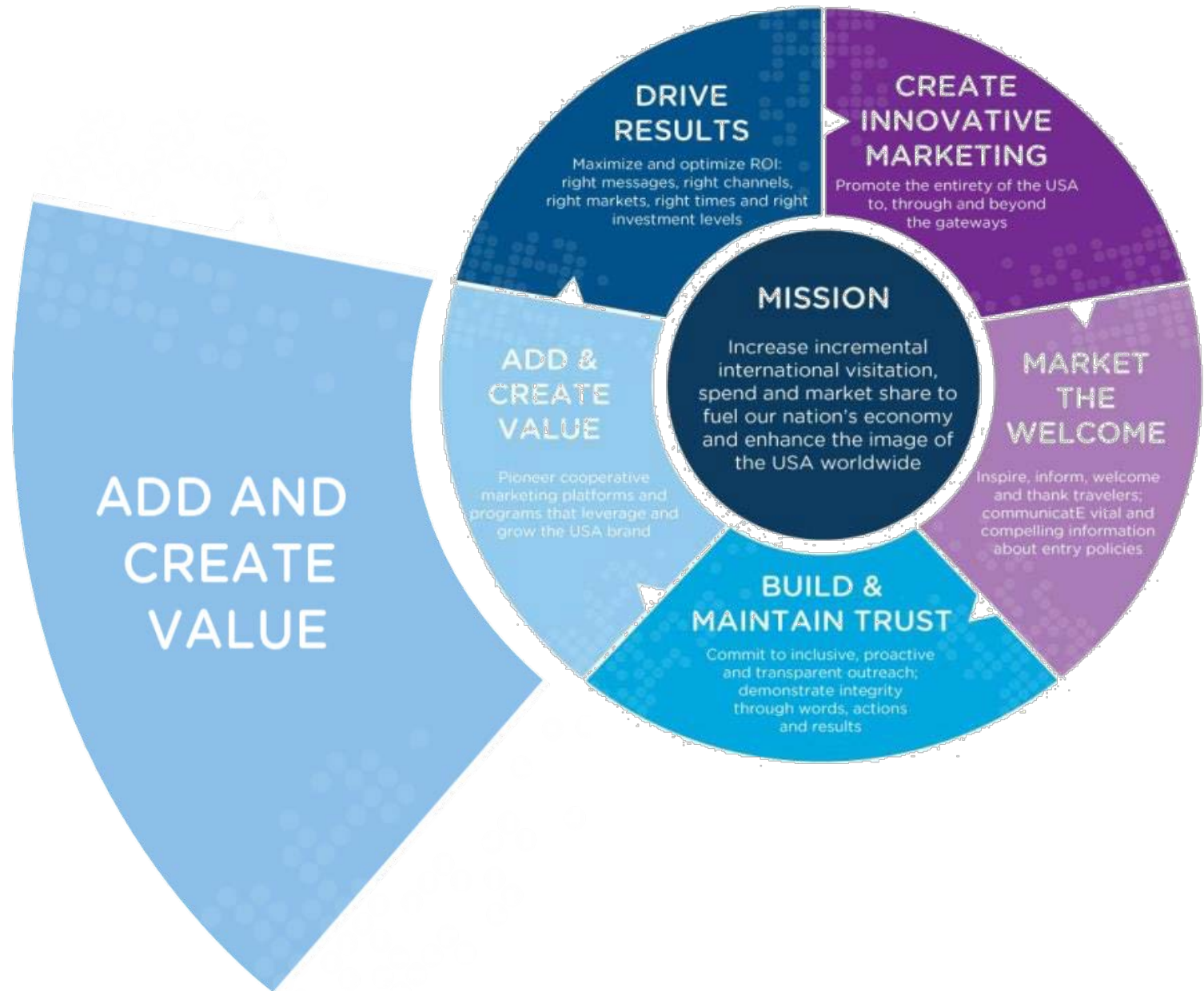




# Value Proposition



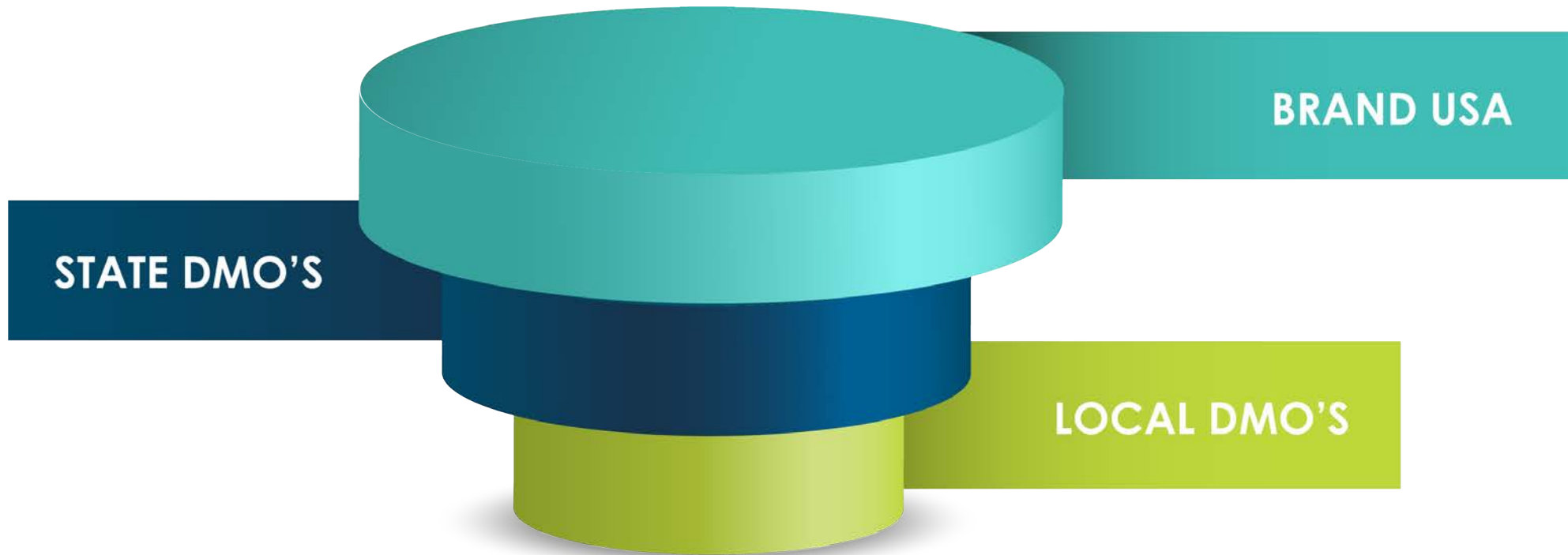
**Add and create value**  
by pioneering cooperative  
marketing platforms and  
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leverage the USA brand in  
ways our partners would be  
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on their own







# 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



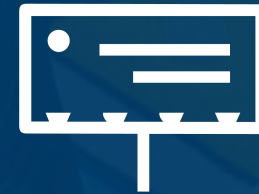
Mobile



Laptop/Desktop



Smart TV



Digital OOH



Giant Screen

***“From mobile to giant screen and everything in between”***





# Giant Screen Films

USA

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

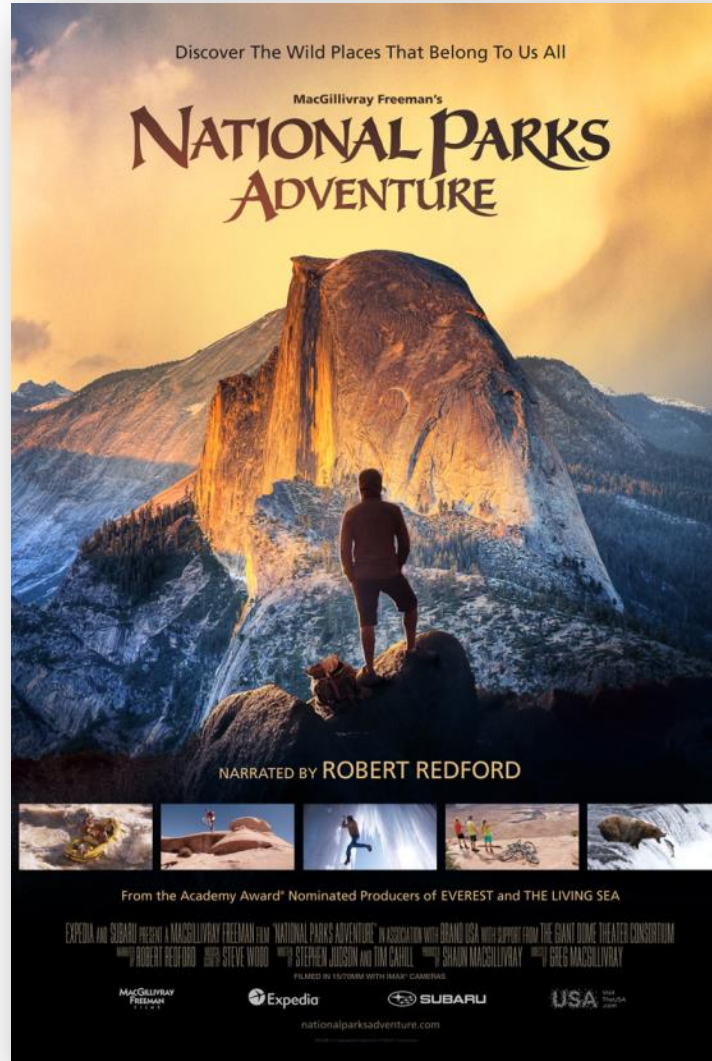
Brand USA



# Giant Screen Films

Aspirational

Captivating



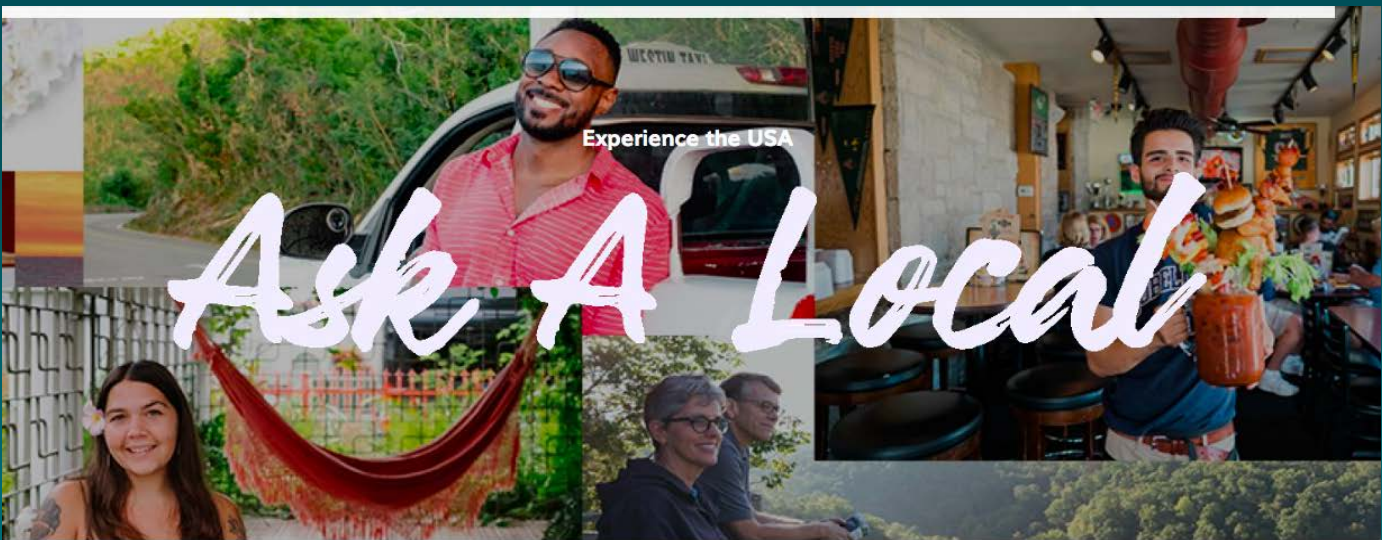




# Global Campaigns



# 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



ASK A LOCAL  
St. Petersburg and Clearwater,  
Florida



ASK A LOCAL  
Wichita, Kansas



ASK A LOCAL  
Mall of America, Minnesota



ASK A LOCAL  
U.S. Virgin Islands



ASK A LOCAL  
Houston, Texas



ASK A LOCAL  
Black Hills, South Dakota



ASK A LOCAL  
Bend, Oregon



ASK A LOCAL  
Las Vegas, Nevada



ASK A LOCAL  
Miami and Key West, Florida



ASK A LOCAL  
Sioux Falls, South Dakota



ASK A LOCAL  
Portland, Oregon



ASK A LOCAL  
Oregon



WELCOME TO

# Black Hills



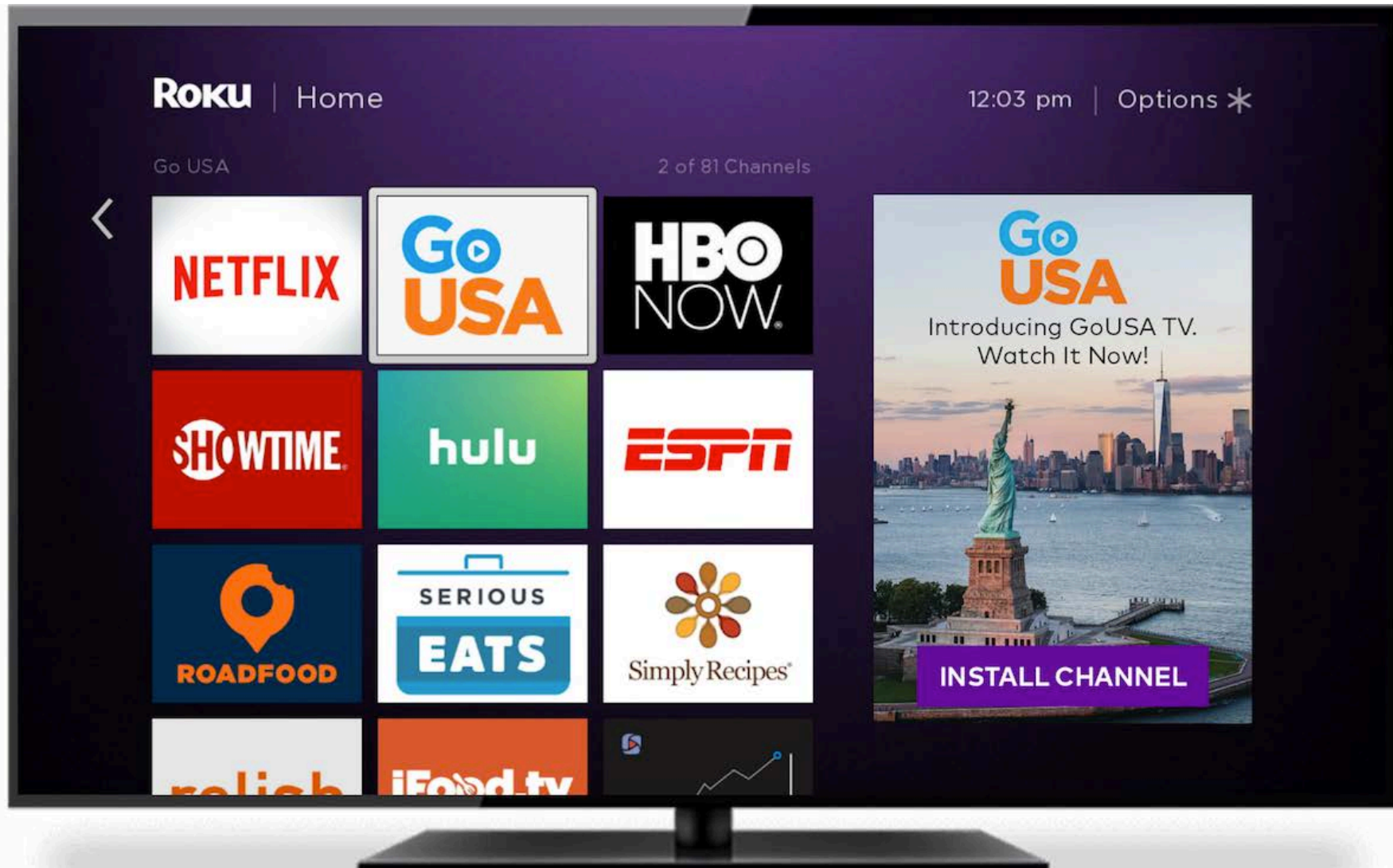


WELCOME TO

# Sioux Falls

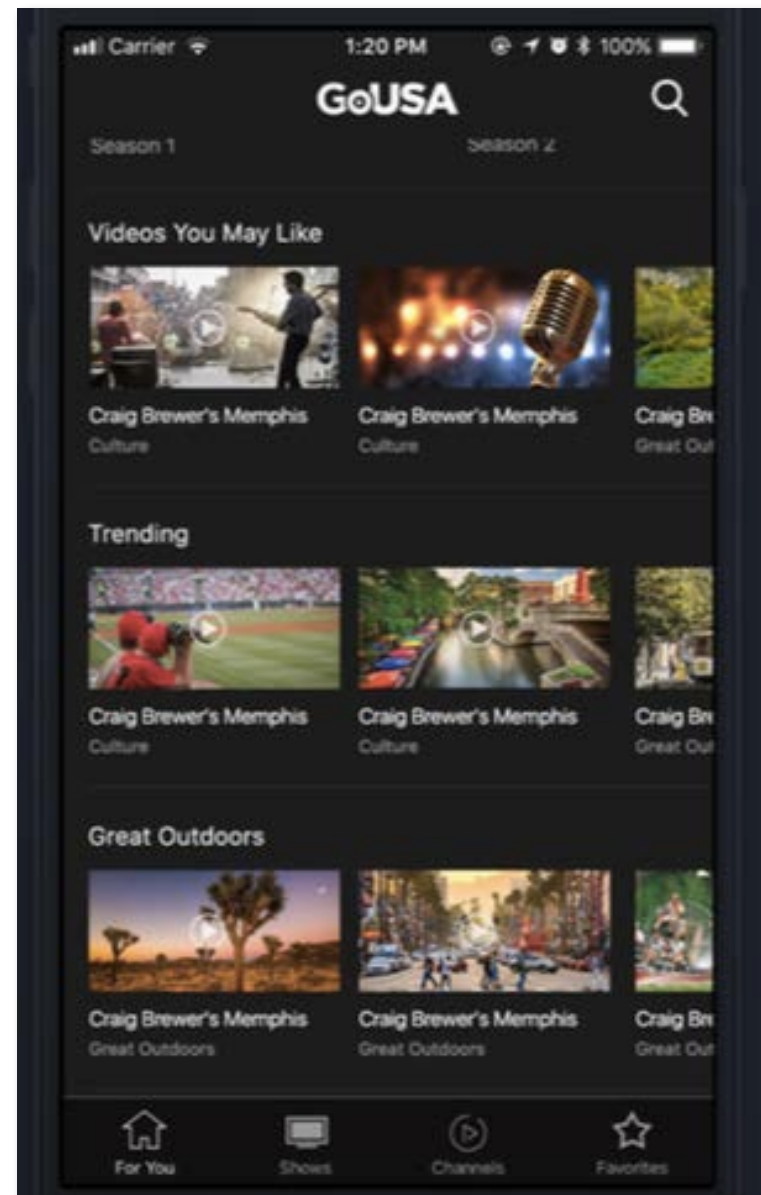
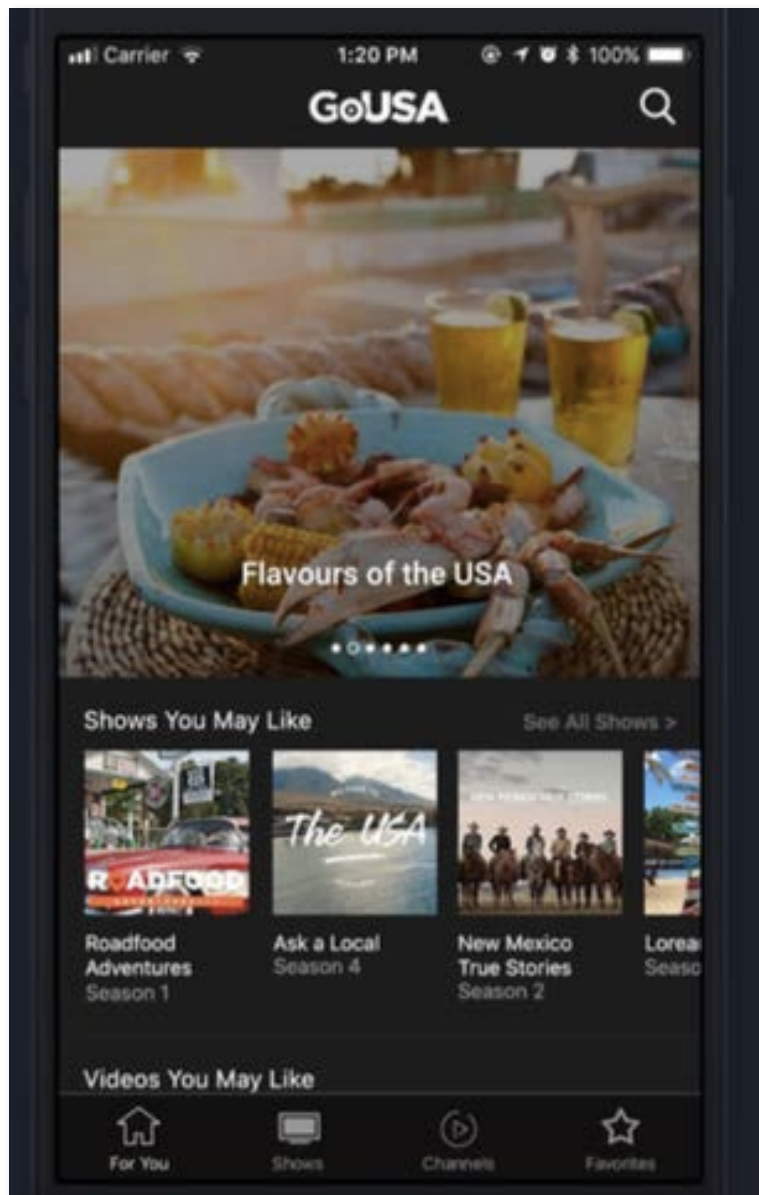








# GoUSA TV Mobile App







# 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



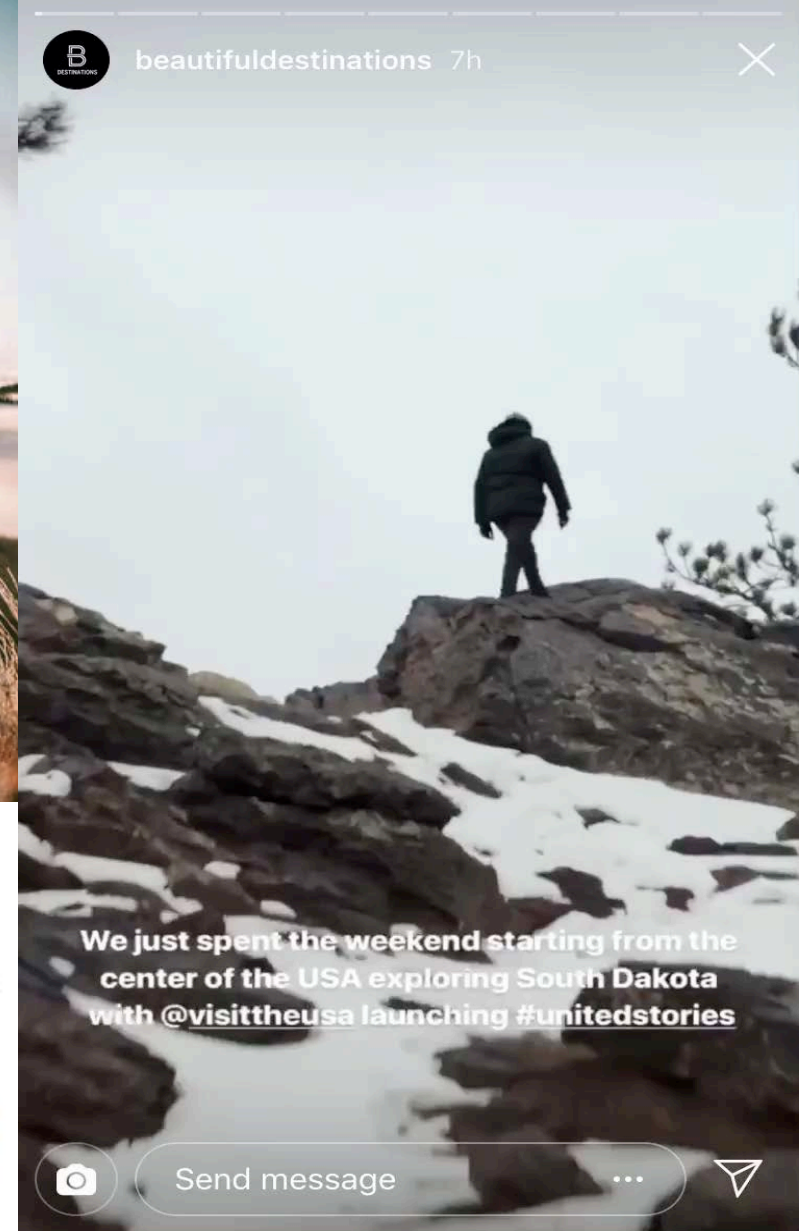
**gypsea\_just** • Follow

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



Send message











**Like/Follow/Share**

**Travel Industry**

**TheBrandUSA.com**



@BrandUSA



BrandUSATV



BrandUSA

**Consumer**

**VisitTheUSA.com**



@VisitTheUSA



VisitTheUSA



VisitTheUSA



VisitTheUSA

**GoUSA**tv

Available on Roku,  
Apple TV, and  
Amazon Fire

# Thank You

