

USA

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Brand USA

American Indian Tourism Conference

September 13, 2017





Brand USA mission:

Increase INCREMENTAL international visitation, spend and market share to fuel our nation's economy and enhance the image of the USA worldwide.



TRAVEL FUELS THE ECONOMY

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Travel Powers the Economy and Enhances the Image of the USA

#1 Services Export

- 76 million international visitors spent \$245 billion
- \$84 billion trade surplus
- 33% of U.S. service exports - 11% of all U.S. exports

2.7% of GDP

- \$1.6 trillion in economic output
- \$141.5 billion in tax revenue

7.6 Million Jobs Supported by Travel

- 5.3 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
- 61% more likely to support U.S. policies



Leadership Roles in the U.S. Travel Industry to Increase International Travel to the USA



PROMOTE **TRAVEL & TOURISM INDUSTRY** **ADVOCATE**

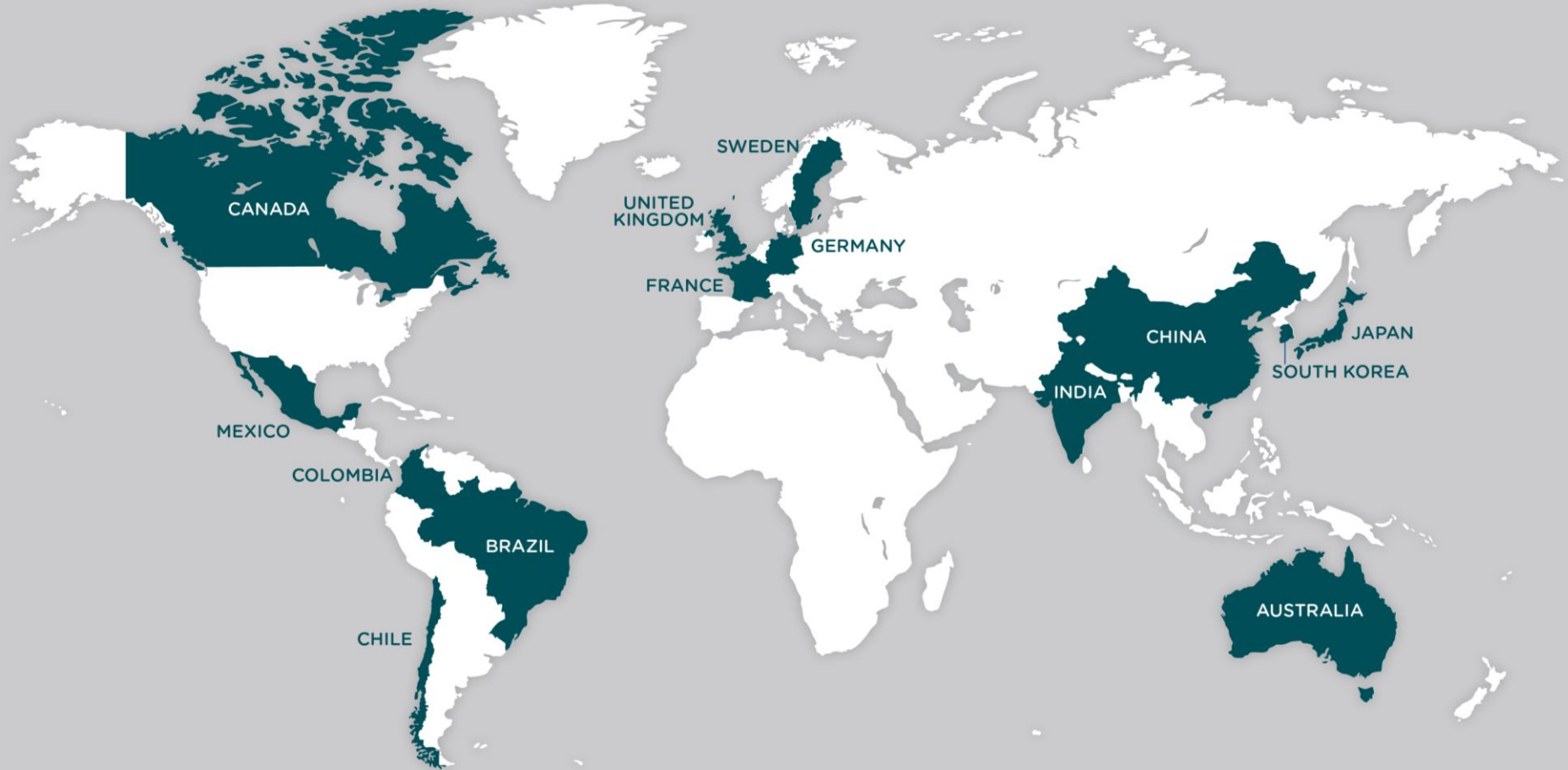
National Travel & Tourism Office



POLICY & COMPETITIVENESS

The USA Campaign

Consumer marketing campaigns in 14 markets that generate more than 80% of inbound travel to the USA



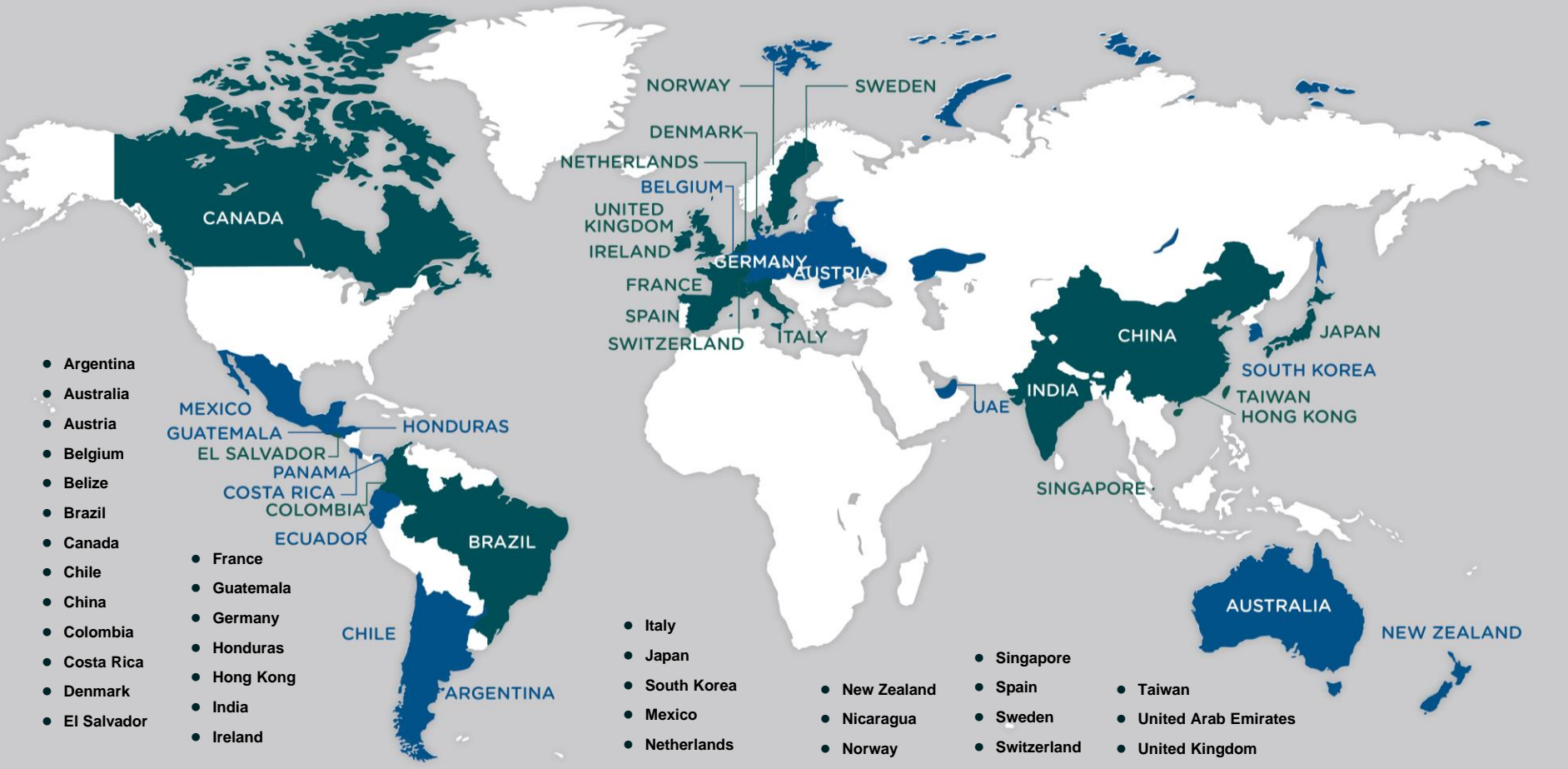
International Offices: Travel Media & Trade Relationships in 20 Markets

- Canada
- Mexico & Central America
- Brazil
- UK & Ireland
- Germany, Austria & Switzerland
- India
- Australia & New Zealand
- China (4 offices)
- Hong Kong, Taiwan & Singapore
- Japan
- South Korea



Marketing Initiatives in over 40 markets

Reaching more than 90% of inbound travel to the USA



- Argentina
- Australia
- Austria
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- El Salvador

- France
- Guatemala
- Germany
- Honduras
- Hong Kong
- India
- Ireland

- Italy
- Japan
- Mexico
- Netherlands

- New Zealand
- Nicaragua
- Norway

- Singapore
- Spain
- Sweden
- Switzerland

- Taiwan
- United Arab Emirates
- United Kingdom

Marketing Initiatives in over 40 markets

Reaching more than 90% of inbound travel to the USA

4.3 million
incremental visitors

\$13.6 billion
in incremental spending

an average of

50,900

incremental jobs
supported each year

Federal, state,
& local taxes
nearly **\$4** billion

\$29.5 billion
in total economic impact

In partnership with

more than
700
partners since our founding

98% partner program
retention rate
in FY2016

Brand USA Global Campaigns

USA

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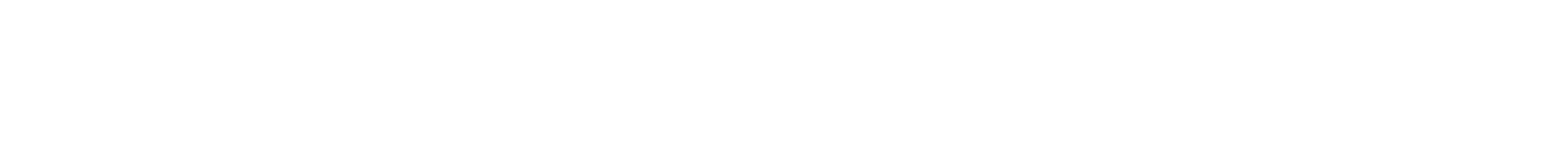
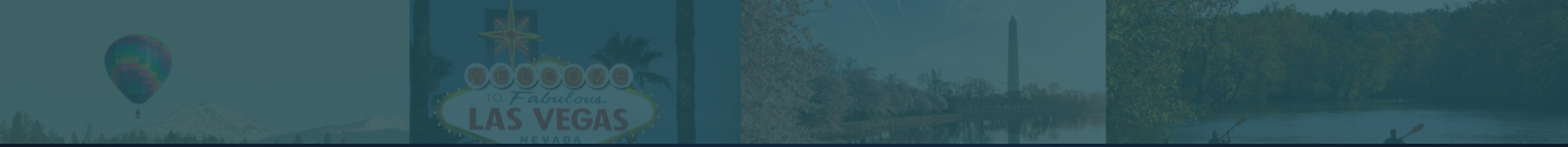
Brand USA



The diversity of the USA is exciting and uniquely ours to own in a way that is magnetic and inviting, and uniquely “yours” to discover genuine and authentic opportunities that truly speak to who you are. The collection of these experiences become our own unique story that we, in turn, share with friends and family. There’s an American story for everyone just waiting to be created.

Plan Your USA Trip Now.








GO CURIOUS
PLAN YOUR USA TRIP NOW

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GO LOCAL

PLAN YOUR **USA** **TRIP NOW**

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NATIONAL PARKS ADVENTURE

USA

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A movie poster for 'National Parks Adventure' featuring a silhouette of a person standing on a rocky outcrop overlooking a vast, mountainous landscape with a waterfall. The title 'NATIONAL PARKS ADVENTURE' is prominently displayed in a stylized font, with 'NATIONAL PARKS' in a larger, more ornate script and 'ADVENTURE' in a smaller, simpler font below it. The background is a dramatic, high-angle view of a mountain range under a warm, golden sky.

MacGillivray Freeman's
NATIONAL PARKS
ADVENTURE

NARRATED BY **ROBERT REDFORD**

MacGILLIVRAY
FREEMAN
FILMS

Expedia

SUBARU

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On the eve of the 100th anniversary of America's National Parks, we set out to tell the extraordinary story of their history and diversity, and to show how much these majestic landscapes improve our lives by offering each of us a place to play as well as sanctuary from the modern world. We aimed to inspire global audiences to get off the beaten path and find their own thrilling off-trail adventures awaiting them deep inside the American wilderness.

It is evident from the phenomenal reception the film and our broader Great Outdoors campaign has received from all over the world that *National Parks Adventure* will inspire many people for years to come to make one of America's national parks their next travel destination.

Making An Impact Around The World

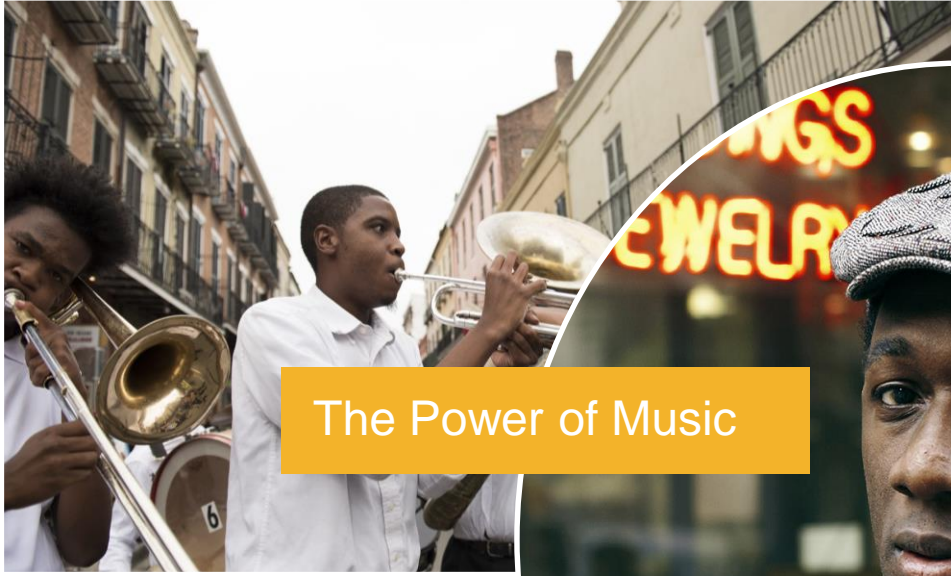
- **Over 4 million people** have watched the film 119 theatres worldwide or online on Youku (China).
- *National Parks Adventure* was the **highest-grossing documentary film in the world in 2016**.
- The film's release is the industry's **fastest giant-screen roll-out** in 5 years, with 48 exhibitions in 6 countries in February, and 119 Theatres in 16 countries within the first 12 months.
- The film trailer has been seen by over 60 million people around the world.
- The film's PR campaign garnered **more than 4,000 pieces of earned media**, with **7 billion** media impressions.
- Local marketing efforts by exhibitors and film partners resulted in more than **1 billion additional global impressions** worldwide.
- Winner of the **2016 GSCA Awards** for Best Film, Best Cinematography, Best Sound Design, Best Original Score and Best Marketing Campaign, the Travel Weekly Award **2016 Gold Magellan Award** for best Advertising/Marketing Campaign.
- Winner of 3 **Gold Awards** at the **2016 HSMAI Adrian Awards** for Best Global Campaign, Advertising Innovation and PR Special Events and an Advertising Platinum Award.
- 2017 winner of the **Brand Film Festival Award** for Best Film by a Brand.



AMERICA'S TREASURES

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The Power of Music



*"Just look around the whole wide world
So many beautiful things to see
Take my hand and come along
spread some love with me"*

Aloe Blacc







BRAND USA'S ROLE IN TRAVEL POLICY COMMUNICATIONS

Brand USA's Legal Responsibilities

- **Promote the entirety of the United States of America:**
 - 50 States
 - 5 Territories
 - District of Columbia
 - Not only to, but through and beyond the gateways
- **Communicate Accurate and Timely U.S. Visa and Entry Policy**

Changes in Travel Policy



Any change in policy creates a communications need:

- Monitoring and researching
- Adjusting our marketing and messaging as necessary
- Communicating travel policy and correcting misperceptions about the policy

Our Messaging

- The reasons people want to visit the USA remain the same today as they have always been: **Our destinations, our experiences, and our people.**
- What makes the United States of America the aspirational destination it is around the world hasn't changed - In fact, **it is as amazing as ever.**
- **Nothing legally has changed** about how anyone in the world secures a visa to the USA.
- Nothing legally changed about how anyone from around the world enters the USA except the new **policy regarding electronics** that affects 8 countries and 10 gateways in the Mideast.



ONE BIG WELCOME

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Experience – VisitTheUSA.com



Experience
Alaska Native Heritage Center



Experience
Native American Culture and History in Montana



Experience
5 Places to Experience Native American Culture



Experience
[An Insider's Guide to Native New Mexico](#)



Experience
5 Places to Buy Native American Crafts and Jewelry



Experience
Where to See the Great Outdoors on Native American Land



Experience
Cherokee: Authentic Native American Culture



Experience
Seminole Tribe of Florida: A Native Culture Comes Alive



Experience
Central Montana: Cowboys, Ranches and Native American Traditions



Experience
Discover Indigenous Culture at the United Tribes International Powwow

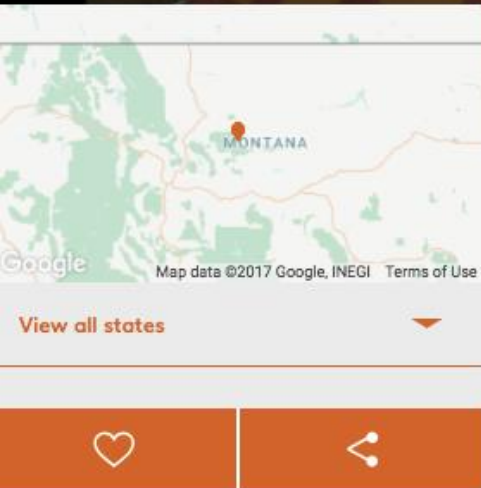
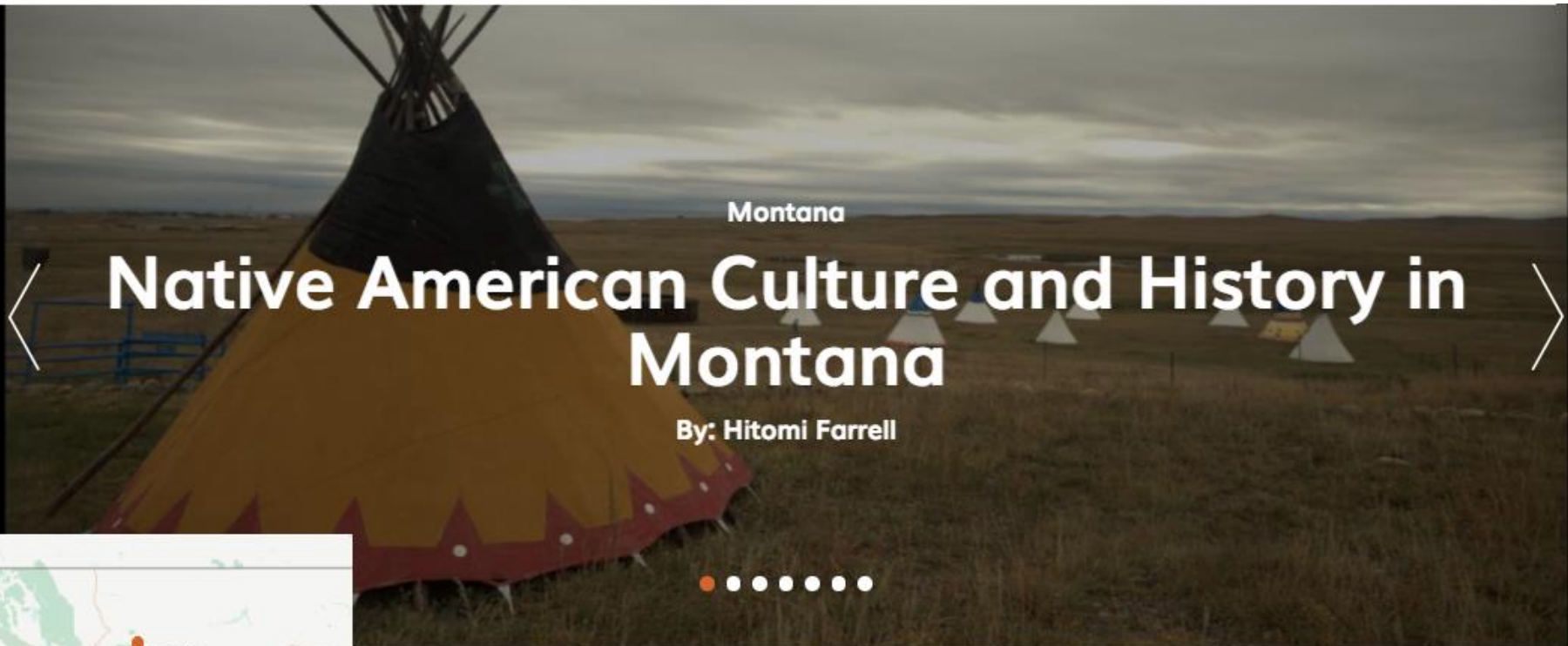


Experience
5 Family-Friendly Outdoor Activities in San Diego



Experience
Puerto Rico's Historic Treasures Enchant Visitors

Informative Landing Pages



Montana

Native American Culture and History in Montana

By: Hitomi Farrell



Beyond Montana's amazing landscape and national parks, there are 12 Native American tribes in the state, and they represent 6.3 percent of the population.

You can't really talk about American culture and history without learning about the Native Americans, and Montana is a wonderful place to experience Native American cultures and traditions. I visited several Native American museums and reservations during my time in Montana.

Inspiration Guide



Native American travel experiences featured in annual travel guide since 2013. Guide available in multiple languages, distributed to our 14 fully-deployed markets and beyond.

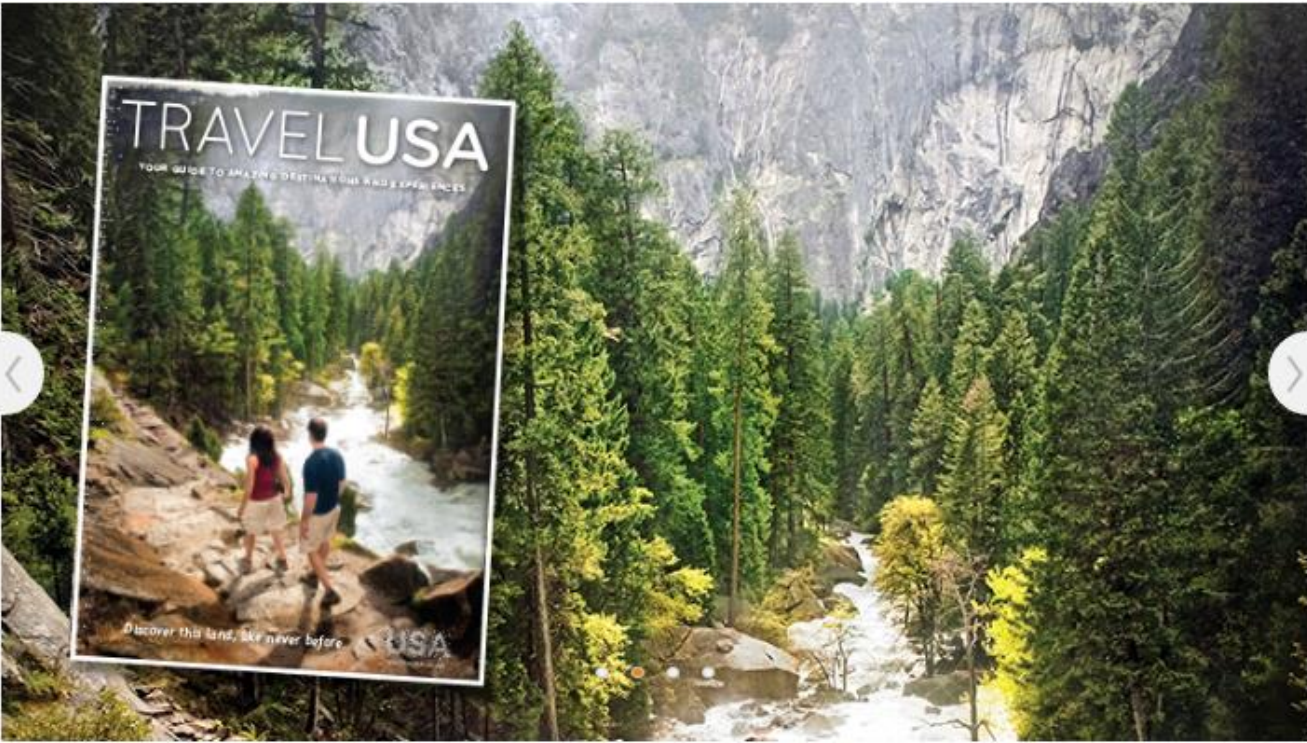


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Inspiration Guide

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Trade Shows and Missions



Familiarization Trips/Visiting Journalist Programs





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