The POWER of TRAVEL PROMOTION

What Destination Marketing Means to Communities Nationwide

UPDATED JANUARY 2017











U.S. TRAVEL ASSOCIATION

CONTENTS

2 Executive Summary

4 The Power of Promotion

CASE STUDY
5 Under Armour: "Turning an Uber-Masculine Sportswear Brand into a Symbol of Female Athletic Aspiration"

6 Travel Industry Drives Growth and Jobs

7 Travel Leads the U.S. Economic Recovery

7 Travel Jobs: A Gateway to Opportunity

8 Travel-Generated Taxes Fund Essential Services

10 Travel Promotion Strengthens Economic Vitality and Spurs Economic Development

CASE STUDY
11 "New Mexico True" Delivers 72:1 Return in Visitor Spending

CASE STUDY
13 Lake Erie Shores & Islands: "Lake Erie Love" Drives Economic Revival

15 Travel Generates Broader Investment and Economic Benefits

CASE STUDY
16 Music City Transforms Nashville into a Must-See Destination

CASE STUDY
18 "This is Cleveland"

CASE STUDY
20 Exploring Asheville, Inside and Out

21 Building U.S. Market Share in the Booming International Travel Market

23 Leveraging Brand USA Helps Local Destinations Reach International Travelers

CASE STUDY
24 Travel South USA: Partnering to Boost International Visitors

CASE STUDY
26 The Economic Risks of Cutting Travel Promotion

CASE STUDY
28 VISIT PHILADELPHIA Responds

CASE STUDY
30 San Diego: Weathering the Storm

32 Key Takeaways

33 Endnotes

Foreword from U.S. Travel President and CEO

Dear Travel Colleague:

As we enter 2017 with many fresh faces in the U.S. Congress, and in state houses and local council chambers, it's a critical moment to renew focus on the value of travel promotion. Our industry plays a key role in communicating the value of travel, informing lawmakers and stakeholders of the benefits derived from a healthy flow of visitor traffic.

In today's highly competitive global marketplace, where people have more choices than ever, companies, brands and even politicians embrace the importance of promotion. Investing in marketing and advertising increases awareness, while, conversely, decreasing investment in promotion inhibits a brand's ability to compete—often with detrimental results.

This is certainly true within the travel sector. Destinations that cultivate a brand through effective travel promotion attract more visitors, whose spending helps create jobs and grow the local economy. Further, destination marketing can help improve both local and visitor perception of an area—resulting in increased business development, upgraded infrastructure and even population growth. Travel-generated tax revenue can be used to fund essential community services, including police and firefighters, and public schools.

However, some lawmakers and officials may have a misguided understanding of the value of travel promotion. U.S. Travel's "Power of Travel Promotion" report can be used to educate local leaders on why this investment is so important. Updated in August 2016, the report comprises several case studies from destinations across the

United States that have experienced the benefits of investing in travel promotion, as well as a few examples of the negative consequences resulting from a reduction in funding.

Additional online resources can be found at **ustravel.org/travelpromotion**. If you have any questions, or need additional support, please do not hesitate to contact U.S. Travel's research team: **Research@ustravel.org**.

Sincerely,

Roger J. Dow
President and CEO
U.S. Travel Association

This report highlights several key facts, including:

- Travel provides essential support to state and local governments. **Travel generated $148 billion in total tax revenue in 2015.[6] Without this impact, each U.S. household would pay $1,200 more in taxes every year.[7]**
- Investing in travel promotion generates a virtuous cycle of economic benefits. Travelers visiting a destination spend money at local attractions, hotels, retail, restaurants and transportation. **Promotion also improves the quality of life for residents, offering a positive "halo effect" on perceptions of a destination for residents and visitors alike.[8]**
- Investing in destination marketing drives broad economic growth. In fact, destinations with a higher concentration of visitor-related industries tend to grow faster than other regions.[9] And **growth in travel and tourism employment in a destination tends to be followed by a 1.5-percent rise in broader employment.[10]**

THE **POWER** OF **PROMOTION**

World-class companies invest heavily to build brands and win customer loyalty. Brand-building investments in advertising, marketing and promotion can distinguish products, inspire consumers and separate successful brands from the market's also-rans.

The amount presidential and congressional candidates have spent campaigning and promoting themselves as of the beginning of May 2016.[16] Not even halfway through the election year, presidential candidates have spent nearly $655 million promoting themselves, with House and Senate candidates spending an additional $519 million.[17]

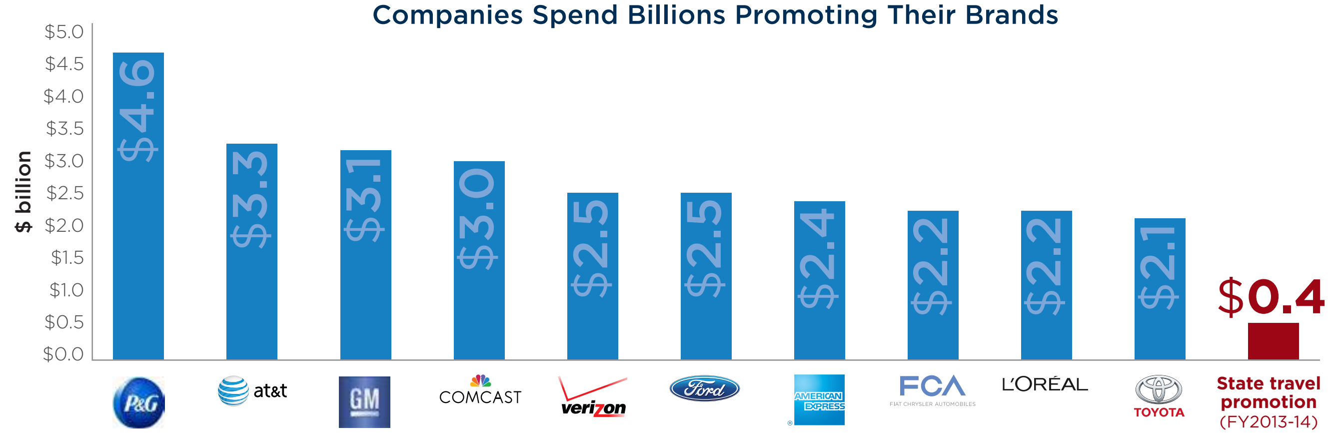
What is true for consumer products is equally true for travel destinations. In today's highly competitive global marketplace, consumers have more choices than ever when it comes to mobile phones, cars, shampoo, soda—and travel options.

Like any product, travel destinations are brands that require investment to remain relevant, attractive and competitive. Destination marketing has proven effective at inspiring interest in a destination, growing tourism and supporting local businesses. A strong track record proves most states have more to gain by continually tapping into the power of promotion.

In 2014, the top 50 corporate advertisers spent a staggering $80.6 billion marketing and promoting their brands.[11] By comparison, the 50 state tourism offices spent about **one-half of one percent** as much—just $437 million in fiscal year (FY) 2013-14 to market their destination brands.[12] Even the 50th ranked advertiser, Mars, Inc., spent $827 million advertising their brands,[13] nearly twice as much as all 50 state tourism offices combined.

Last year, the median state marketing budget for travel and tourism was $7.1 million[14]—enough to buy 45 seconds worth of advertising during the Super Bowl.[15]

Companies Spend Billions Promoting Their Brands



SOURCE: Advertising Age and U.S. Travel Association, 2015.

Travel destinations are also brands requiring investment to stay relevant, competitive and attractive. Destination marketing has proven to be particularly effective at inspiring and generating interest in a destination. Investing in tourism promotion is essential to develop an image and brand that resonates with potential visitors and residents. Destinations must be memorable, authentic and live up to expectations to maintain relevancy and inspire potential travelers.

Under Armour: "Turning an Uber-Masculine Sportswear Brand into a Symbol of Female Athletic Aspiration"

Marketing and advertising helped define the Under Armour brand, but its initial appeal was severely lacking in one key market: female athletes. In 2013, women's products contributed only 17 percent to the company's total revenue.[18]

Revenues lagged because athletic women did not relate to Under Armour's primary target: the core athlete—and more specifically football players. The brand was not viewed as empowering or stylish. Instead women described Under Armour as "meat-headed," "aggressive" and "definitely not for me."[19] Under Armour was in danger of being all but shut out of the women's category entirely.

After the failure of Under Armour's 'shrink it and pink it' attempt to appeal to women, the company invested $15 million to develop an authentic message that spoke directly to women.[20] This investment resulted in the "I Will What I Want" campaign—part of a strategy to shed Under Amour's "male-only" image and appeal to a growing demographic.

This hugely successful campaign resulted in a **367-percent increase in purchase intent** and a **28-percent increase in sales**.[21] Under Armour recently completed its 18th consecutive quarter with more than 20-percent sales growth.[22] In 2014, the Under Armour women's line brought in close to 30 percent of total revenue, nearly double the share of revenue in 2013.[23]

Photos Courtesy of Under Armour.

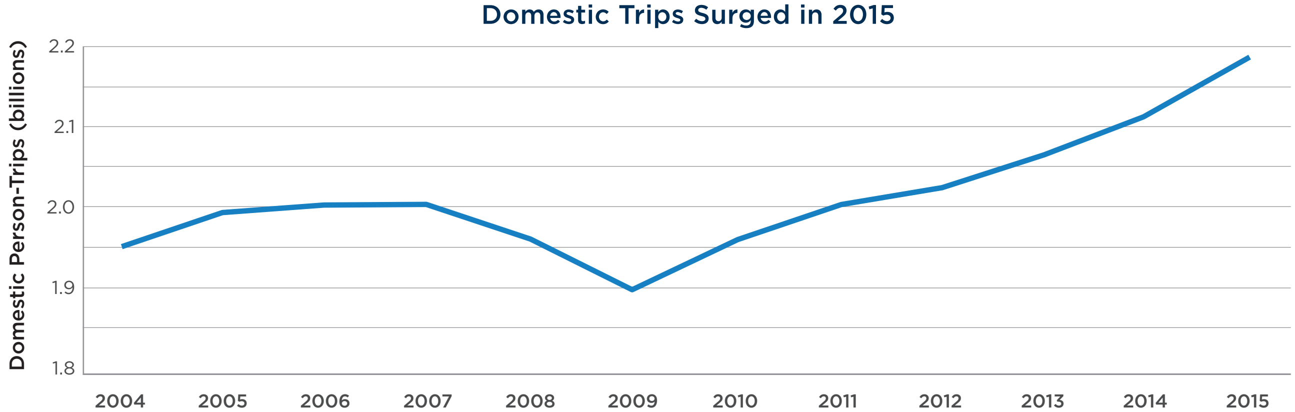
TRAVEL INDUSTRY DRIVES
GROWTH AND JOBS

By investing in effective travel promotion, states and cities attract new visitors, generate significant local economic activity, create well-paying jobs and generate crucial tax revenue to support essential services. Without effective promotion, states and cities forfeit these benefits to other destinations.

Travel is a primary driver of economic growth and job creation in the United States. In 2015, domestic travelers took nearly 2.2 billion trips—an increase of 3.3 percent from 2014—the fastest rise in more than a decade.[24] The U.S. also welcomed an impressive 77.5 million international visitors in 2015.[25] Together, these travelers generated **$2.1 trillion** in output for the U.S. economy.[26]

Nationwide, 15.1 million Americans—**one in nine** private-sector jobs—depend on travel for their livelihood. Travel is a top-10 employer in 49 states and the District of Columbia.[27] And unlike jobs in manufacturing or information technology, travel jobs cannot be easily outsourced or moved overseas.

Domestic Trips Surged in 2015



SOURCE: U.S. Travel Association, 2016.




TRAVEL LEADS THE U.S. ECONOMIC RECOVERY

Since the Great Recession, the travel industry created 972,000 jobs through the middle of 2016 and expanded employment **18 percent faster** than the rest of the economy.[28] Travel industry wages and salaries also rose 10 percent faster than the overall private sector over the last five years.[29]

From 2010 to 2014, the travel industry created jobs at a faster rate than the rest of the economy in 48 states and the District of Columbia.[30] Since the recovery took hold in early 2010, the travel industry has created more jobs than the entire manufacturing sector.[31]

Jobs Created Between Early 2010 Through Mid-2016

	Travel Industry	Manufacturing Industry
Jobs Added	972,000	843,000
Rate of Jobs Created	13.5%	7.4%

SOURCE: U.S. Travel Association and Bureau of Labor Statistics, 2016.

TRAVEL JOBS: A GATEWAY TO OPPORTUNITY

Travel jobs serve as a gateway to opportunity and a middle-class life for millions of Americans. In addition to teaching essential job skills and offering rewarding career paths, the travel industry also provides many employees with the flexibility they need to fulfill their higher education goals.

Earning Middle-Class Wages

More than half of all travel industry employees—a total of 4.3 million—earn middle-class wages or higher.[32]

A Launching Pad to a Successful Career

Two out of five workers who first took a job in the travel industry are earning more than $100,000 per year.[33]

Promoting Higher Education

Of the 5.9 million Americans working part-time while pursuing higher education, two million work in the travel industry.[34] Among workers who began their careers in the travel industry, 33 percent earned at least a bachelor's degree, compared to just 28 percent in health care, 19 percent in construction and 18 percent in manufacturing.[35]

SOURCE: Bureau of Labor Statistics, Current Population Survey, 2016.

TRAVEL-GENERATED TAXES
FUND ESSENTIAL SERVICES

Travel generated **$148 billion** in total tax revenue, including **$67 billion** in state and local tax revenues in 2015. Without these travel-generated revenues, each U.S. household would pay **$1,200 more** in taxes every year.[36]

From the students' perspective, travel generated enough state and local tax revenue to cover the cost of educating 5.6 million of the 50 million students (11%) enrolled in elementary and secondary public schools across the country, including more than a quarter of students in states relying heavily on visitors such as Hawaii, the District of Columbia, Nevada and Florida.[38] Nationwide, travel generated enough tax revenue to cover **at least 10 percent** of the cost of educating our children in more than half (27) of the 50 states and the District of Columbia.[39]

In 2015, the travel industry **generated $67 billion** in state and local tax revenue—enough to pay the salaries of:

All 935,000 state and local police and firefighters across the U.S., or

All 923,000 secondary school teachers, or

1.1 million (93%) elementary school teachers.[37]








Travel-Generated Taxes Fund Essential Services

Share of Tax Revenue Covering Education Cost (2013)

#1	HAWAII	67.2%
#2	DISTRICT OF COLUMBIA	59.1%
#3	NEVADA	55.1%
#4	NORTH DAKOTA	26.8%
#5	FLORIDA	25.7%
#6	TENNESSEE	17.3%
#7	NEW MEXICO	16.7%
#8	ARIZONA	16.1%
#9	NORTH CAROLINA	15.0%
#10	UTAH	14.3%
#11	SOUTH CAROLINA	14.2%
#12	CALIFORNIA	13.8%
#13	MINNESOTA	13.5%
#14	SOUTH DAKOTA	12.9%
#15	IDAHO	12.8%
#16	MISSISSIPPI	12.6%
#17	COLORADO	12.0%
#18	OKLAHOMA	11.8%
#19	GEORGIA	11.5%
#20	NEW YORK	10.9%
#21	VIRGINIA	10.5%
#22	ARKANSAS	10.0%
#23	VERMONT	9.8%
#24	LOUISIANA	9.8%
#25	MONTANA	9.7%
#26	ILLINOIS	9.6%
#27	MARYLAND	9.5%

SOURCE: U.S. Travel Association, 2016.

TRAVEL PROMOTION STRENGTHENS **ECONOMIC VITALITY** AND SPURS **ECONOMIC DEVELOPMENT**

Investing in travel promotion creates a virtuous cycle of economic benefits. Travel promotion generates awareness and delivers additional visitors. Travelers visiting a destination spend money at local attractions, hotels, retail, restaurants and transportation. Travel spending supports local jobs and generates additional tax revenue for state and local governments to invest in enhanced public services for residents and visitors alike.

Investments in destination marketing have shown to consistently generate dividends by attracting business and leisure visitors. Promotion also improves the quality of life for residents and has a positive impact on perceptions of a destination for residents, potential employees, students and businesses.

Research by Longwoods International suggests that destination marketing creates a "halo effect," contributing to a positive overall impression of a destination. Consumers who recalled a destination marketing campaign were not only more likely to visit, but also more likely to have a positive impression of a location as a good place to live, retire, start a business or attend college.[40]

"New Mexico True" Delivers 72:1 Return in Visitor Spending

In 2012, the New Mexico Tourism Department discovered the state had a perception problem. Research indicated potential visitors had a limited understanding of New Mexico's travel offerings and an inaccurate perception of the state as an arid, barren desert.

NEW MEXICO True
newmexico.org

To reverse these misperceptions, the department launched "New Mexico True," a $1.2-million marketing campaign to showcase the real New Mexico experience. The campaign featured images of couples and families exploring Chaco Culture National Historical Park, driving on open roads through historic towns, trekking with llamas through the beautiful Sangre de Cristo Mountains and hiking around Kasha-Katuwe Tent Rocks National Monument.

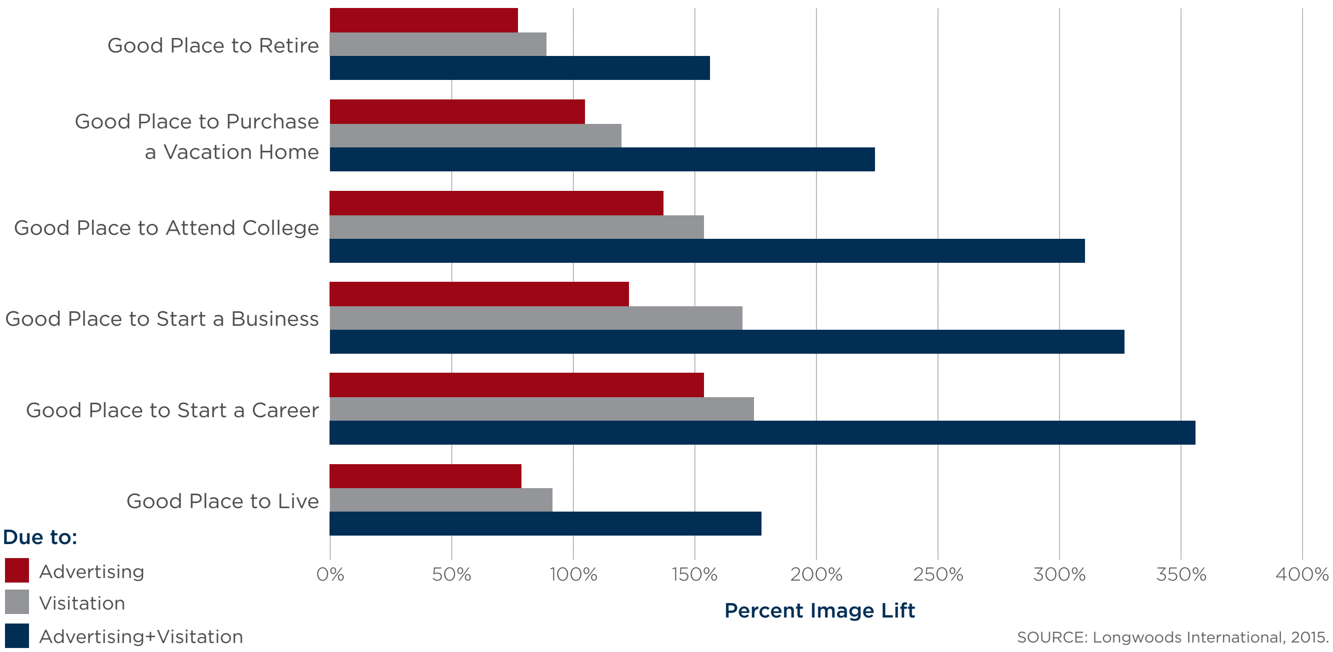
The impact was immediate. The spring/summer 2012 campaign generated 264,000 additional trips and $3.6 million in state and local taxes.[41] One study found that every $1 invested in the ad campaign generated $30 in visitor spending and $3 in tax revenues.[42]

Additional investments yielded even higher returns. Between 2013 and 2015, the New Mexico Tourism Department expanded the campaign to five key out-of-state markets. The updated $2.5 million advertising investment generated 895,000 incremental trips, **$176 million** in incremental visitor spending and **$18 million** in state and local taxes.[43] Every dollar invested in this new campaign generated $72 in visitor spending and $7 in tax revenue, all benefitting New Mexico residents.[44]

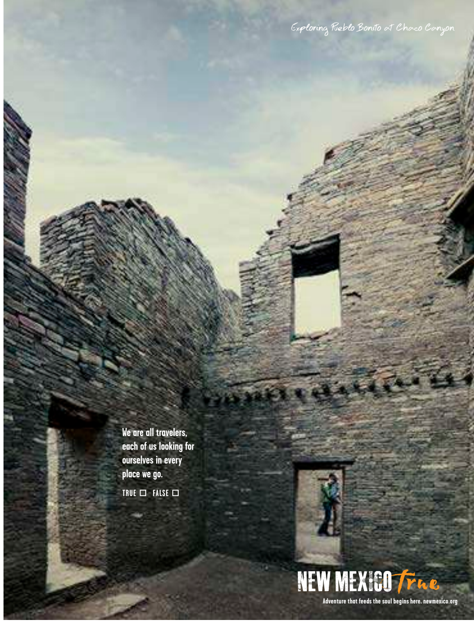
The campaign also boosted perceptions of New Mexico as a good place to start a career, build a business, attend college or purchase a vacation home. In fact, after visiting New Mexico, positive perceptions of the state increased even more. The "New Mexico True" campaign showed people across the country that the Land of Enchantment is much more than just a vacation destination.

Photos Courtesy of New Mexico Tourism Department.

"New Mexico True" Impact on Economic Development Image



SOURCE: Longwoods International, 2015.



> Tourism is such a crucial part of our efforts to diversify the economy in communities large and small throughout the state. As we continue to shatter tourism records, it shows that our "New Mexico True" campaign is not only working, it's a very strong success.
>
> We've known that increases in tourism mean more jobs in the leisure and hospitality sector, and we've known that "New Mexico True" does a great job showing what our state has to offer visitors. What we didn't know until now is how beneficial "New Mexico True" advertising, and the tourism industry as a whole, are to the larger picture of economic development."
>
> **–New Mexico Governor Susana Martinez** (July 23, 2015)

Following record-breaking tourism growth and a 45-percent increase in marketable overnight trips since 2010, the travel industry is now a leader in job growth in the state.[45] In 2014 alone, the travel industry created **2,200 additional jobs**, up 8 percent from 2010.[46] Visitor spending increased 4.5 percent, surpassing the all-time high of $6 billion.[47]

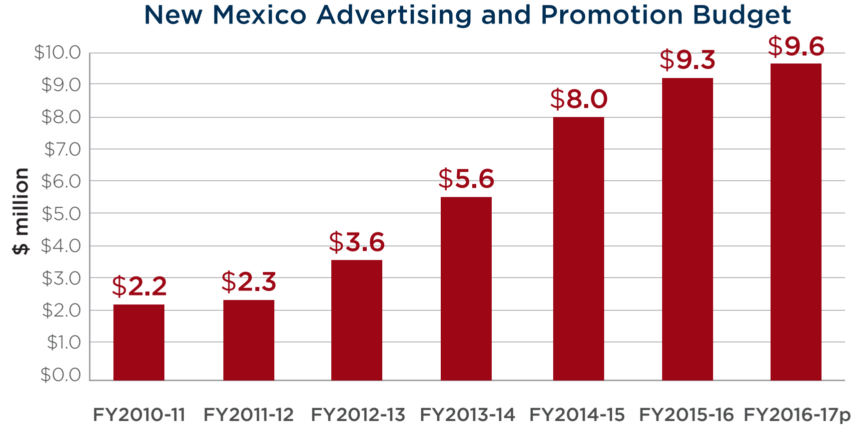
Top public officials have praised "New Mexico True's" success. Governor Susana Martinez credits the campaign for helping New Mexico "shatter tourism records" and boosting "the larger picture of economic development." As a result of the campaign's tremendous return on investment (ROI), legislators and tourism officials have preliminarily dedicated $9.6 million to the advertising budget in FY 2017—more than four times greater than the FY 2010-11 budget.[48]

Since the start of the campaign in FY 2010 through FY 2014-15, New Mexico has seen a 264-percent increase for advertising and promotion funding[49]—significantly higher than the 48-percent increase of U.S. states' overall budgets.[50] New Mexico justified the initial expense of campaign development with increased ROI, jobs and positive economic impact.

The "New Mexico True" campaign successfully positions New Mexico as a great place to visit, work and live.

Today local products use the "New Mexico True" brand to highlight businesses that are "uniquely New Mexican." The success of this effort demonstrates how smart investment in tourism marketing not only can boost travel and tourism, but also improve the image of an entire state.

New Mexico Advertising and Promotion Budget



SOURCE: U.S. Travel Association and New Mexico Tourism Department.

Photos Courtesy of New Mexico Tourism Department.

Lake Erie Shores & Islands:
"Lake Erie Love" Drives Economic Revival

Ohio's Lake Erie Shores & Islands region offers plentiful beaches, beautiful parks and abundant natural areas. It is also home to the Cedar Point amusement park, known as the "roller coaster capital of the world." Yet for years, few tourists knew the area beyond Cedar Point and the Lake Erie islands.

In 2014, the Erie County and Ottawa County Visitor's Bureau tourism partnership launched "Lake Erie Love," a tourism campaign aimed at increasing awareness of the area's vacation offerings and marketing the region as a year-round destination. By combining resources, the two bureaus were able to leverage marketing efforts and create additional opportunities to co-promote through advertising and trade shows.

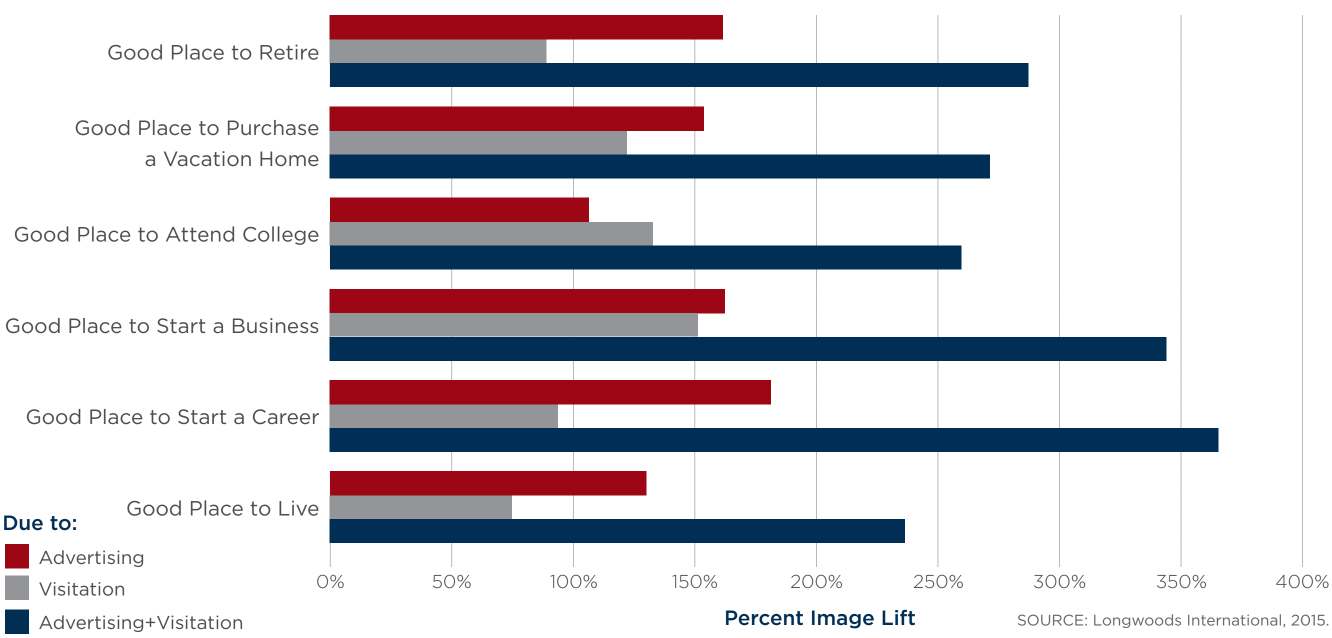
The initial $1 million investment targeted visitors within a day's drive. The result: Nearly two million additional trips to Lake Erie Shores & Islands in 2014.[51] Today, the area welcomes more than **nine million visitors** each year, making the region one of the most popular tourist destinations in the Midwest.[52]

Photos Courtesy of Lake Erie Shores & Islands.

The "Lake Erie Love" campaign helps generate **$151 million** in visitor spending and **$4 million** in local taxes.[53] Local sales taxes have increased 38 percent in the last decade, and lodging taxes increased five percent in 2015 alone. For every $1 invested in advertising, "Lake Erie Love" has returned $4 in local tax revenue.[54]

As travel and advertising grew, so did the destination's reputation as a good place to start a career or business, attend college or purchase a vacation home—demonstrating the success of travel promotion as an effective economic development tool.

"Lake Erie Love" Impact on Economic Development Image



SOURCE: Longwoods International, 2015.

"Lake Erie Love" illustrates the virtuous cycle of promotion spending in action. Because of increased travel and tax revenue, the City of Sandusky, the Villages of Put-in-Bay and Marblehead and other communities in the region are reinvesting to improve the quality of life for visitors and residents alike.

The Cedar Point Amusement Park dedicated millions to refurbish the 100-year-old Hotel Breakers to draw more families. New hotels, restaurants, breweries and retail spaces represent just some of the recent growth. New event spaces and a multi-purpose sports park have also been developed to accommodate the increased demand from destination events such as weddings, reunions, meetings and youth and collegiate sporting events. Visitors create demand for services and unique attractions, ultimately resulting in reinvestment in city revitalization efforts that benefit residents and visitors alike.

"Lake Erie Love" shows that effective travel promotion does not just boost tourism, but can truly transform a region, bringing economic benefits like greater investment, higher tax revenues, new business openings and a better quality of life in its wake.

Travel has the potential to not only create loyal visitors, but also to attract future businesses, residents and students—all contributing substantially to the local economy.

Photos Courtesy of Lake Erie Shores & Islands.

TRAVEL GENERATES **BROADER INVESTMENT** AND **ECONOMIC BENEFITS**

Investing in destination marketing does more than attract visitors and fill hotel rooms. Destination marketing drives broader economic growth and offers benefits to local communities and residents. Destination marketing helps make a destination more competitive, reinforces an image and generates awareness.

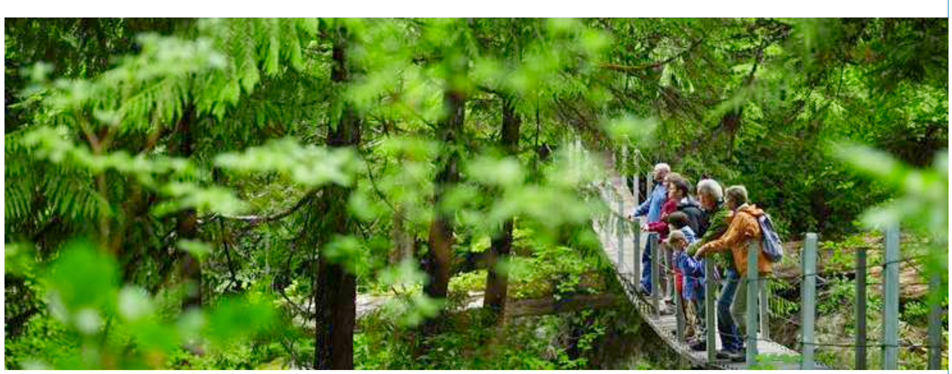
As the case studies in this report make clear, destination promotion can drive broader economic development by:[55]

1. **Raising a destination's profile.**
2. **Increasing tourism and kicking off a virtuous cycle of economic development.**
3. **Generating local tax revenue.**
4. **Enabling public investment to improve the quality of life for residents, businesses and visitors.**

Oxford Economics has demonstrated that destinations with a higher concentration of visitor-related industries tend to grow faster than other regions.[56] A 10 percent increase in travel and tourism employment in a destination tends to be followed by a 1.5-percent rise in broader employment in the near-term.[57]

Moreover, increased visitors result in increased demand for amenities, attractions and offerings that also improve the livability of a destination for locals and their overall quality of life. Upgraded parks, sports stadiums, new dining and nightlife options as well as culture and art attractions are just a few examples of increased offerings that enhance a destination for locals as a result of more travel demand. The taxes generated as a result of tourism are able to support local community improvements and develop additional attractions to continue to stimulate additional visitor demand and economic development.

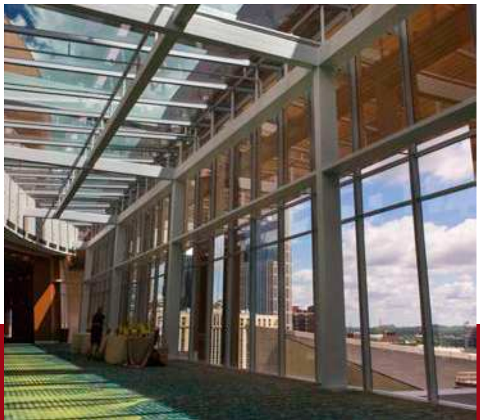
Tourism promotion not only raises a destination's profile, it also builds awareness among potential new residents.[58] A strong brand creates a sense of excitement that appeals to Millennials and other job-seekers, with the power to revive communities and jumpstart growth. In fact, research shows that **nearly one-third** of new residents first visited their communities as tourists.[59]



Music City Transforms Nashville into a Must-See Destination

Nashville's status as the world's 'Music City' is so deeply embedded in our national consciousness it feels as if the city was born with that identity. By making a city-wide commitment to building the Music City brand just over 10 years ago, Nashville has been able to yield measurable tourism results.

By building a strong, authentic and identifiable brand, Nashville now serves as a magnet for music lovers worldwide, drawing a record 13.1 million visitors in 2014 and attracting **$5.4 billion** in visitor spending, directly supporting nearly **58,000 workers**.[60] Nashville has successfully attracted young professionals, employers and decision-makers first as visitors.[61]



Even during the Great Recession, Nashville continued to invest in travel and tourism. In 2013, Nashville celebrated the grand opening of the $585-million, 1.2-million-square-foot Music City Center, just as the economy was recovering.[62] Before the new convention center even opened its doors, event organizers had booked an unprecedented 123 events, representing more than one million room nights.[63] In the first quarter of operation alone, Music City Center's 100 events led to more than 18,000 hotel room nights and generated $26.4 million in economic impact.[64]

As in other regions, a successful tourism center served as a catalyst for broader economic development. Music City Center helped draw more than **$1 billion in new development** to Nashville's burgeoning SoBro (South of Broadway) neighborhood.[65] The ongoing renaissance in downtown Nashville has helped generate a 126-percent increase in hotel tax collections over five years, reaching $57 million in 2015.[66]

Music City shows no signs of slowing down. As a matter of fact, the city has experienced **67 months** of consecutive year-over-year growth in the number of hotel rooms sold. Since January 2016, 49 restaurants have opened, and 58 more are planned for this year.[67] Both residents and tourists benefit from the culinary explosion, from additional dining options to increased employment opportunities. Nashville has also received numerous accolades from *The Daily Meal, Bon Appetit, Condé Nast Traveler* and *USA TODAY*, among others.

Increased demand to visit Nashville from leisure, meeting and business travelers has brought additional air routes and new airlines to the city. Today, Nashville is the fifth fastest-growing airport in North America, serving more than 390 flights daily to 50 nonstop markets.[68]

According to Nashville Public Radio, Nashville is also becoming a hot spot for Millennials, who are flocking to the city before they've even lined up jobs. Recognized as a creative, fun, affordable place to live, Nashville's population climbed 5.9 percent between 2000 and 2010.[69] Since then, the U.S. Census Bureau estimates the population has grown another 6.7 percent to over 644,000.[70]

A truly focused and consistent marketing, branding and promotion campaign can define a city, attract millions of new visitors, spur broad-based economic revitalization that improves the quality of life for visitors and residents alike and draw new, permanent residents—all of which makes Music City a stellar example of the power of promotion.

Photos Courtesy of Nashville Convention & Visitors Corporation.

A truly focused and consistent marketing, branding and promotion campaign can define a city, attract millions of new visitors, spur broad-based economic revitalization that improves the quality of life for visitors and residents alike, and draw new, permanent residents—all of which makes Music City a stellar example of the power of promotion.

"This is Cleveland"

In 2009, Cleveland city and business leaders began reinvesting in the city's visitor infrastructure, and by 2011, roughly $2 billion from public and private funding had already been allotted to construct new hotels and museums and renovate the convention center.

During the same time period, Destination Cleveland was tasked with attracting more leisure and business travelers, improving the visitor experience and engaging the convention and visitors bureau's members to help promote the city.

At the outset, Destination Cleveland conducted a survey to get an understanding of current perceptions of the city. Research concluded that "Cleveland has a communication gap, not a product gap." Findings indicated that potential visitors had a visceral reaction to Cleveland that clouded their receptivity to all the city's offerings. In addition, the organization discovered that the city's familiar tagline "Cleveland Rocks" did not motivate people outside of the region to visit. The research also indicated that recommendations to visit from friends and family who live in the city are the third most important source of information for a potential visitor—particularly troubling because in 2012, only 34 percent of Clevelanders said they would recommend Cleveland as a place to visit.[71]

After 18 months of brand research and creative development, Destination Cleveland began engaging city and county government leaders, mayors and managers of Cuyahoga County, non-governmental organizations, local media leadership and residents in order to familiarize them with the branding initiative and better equip them to serve as ambassadors.

In January 2014, Destination Cleveland recruited major local attractions as partners to kick off the #ThisisCLE campaign, a local movement that encouraged residents to share their favorite things to do in Cleveland with potential visitors. The hashtag began trending and residents felt empowered to become brand advocates.

In March 2014, the city launched the "This is Cleveland" brand.[72] The brand focuses on Cleveland's world class art, culture and rock and roll and delivers its message through the emotion of a city that has never been flashy, trendy or perfect. This approach has allowed the brand

> "We've created a new destination brand because it's time to change the narrative about Cleveland at home and outside the city. Right now, Cleveland is enjoying a renaissance along with the benefits of billions of dollars in new development and improvements. Now is the time to drive more travel and tourism to Cleveland."
>
> **–David Gilbert, president and CEO, Destination Cleveland**

Photos Courtesy of Destination Cleveland.

> **At its core, I think of a brand as a collection of stories describing a person, place or thing. Those stories create a narrative that comes from word-of-mouth accounts of experiences with that person, place or thing. For us, promoting resident ambassadors' stories and advertising the destination to visitors are key to changing the Cleveland narrative through our branding."**
>
> **–Colette Jones, vice president of marketing, Destination Cleveland**

to be irreverent and fun, not take itself too seriously and to invite residents and visitors to do the same.

That same year, visitor volume reached a five-year high of 16.9 million visitors, up 4.5 percent from 2013.[73] Today, the local travel industry employs nearly **66,000 people**, or about 8.1 percent of salaried workers in Cuyahoga County.[74] A new record of 17.6 million visitors generated **$8.1 billion** in total economic output and **$1 billion** in tax revenues for the county in 2015.[75] In part to the social media campaign and the corresponding #ThisisCLE mobile tour, the percentage of residents willing to recommend the city as a place to visit rose from **34 percent to 54 percent**.[76]

There continues to be significant local engagement with #ThisisCLE. Not only is the hashtag still used as part of a local traveling mobile tour, it is cited in all travel promotion so that visitors can join in the conversation and discover why Cleveland is a fun and unique place to visit.

Artists, partners, developers and retailers are not only sharing content via the brand campaign, they have also adopted the new Cleveland logo as their own, using the logo on everything from merchandise to public artwork. The logo has even earned a spot in artwork slated for the underpass of one of the city's new highways.

As leisure travelers continued to express their interest in Cleveland, the business community followed. Thanks in large part to the city's new convention center, which opened in 2013, Destination Cleveland generated a 22 percent increase in convention leads over 2013, the highest since 2009.[77] The number of definite room nights has also grown by 70 percent since 2013.[78] Most notably, the city was selected to host the coveted 2016 Republican National Convention. U.S. Travel estimates that the convention alone generated a total of **$300 million** in economic output and supported **1,800 jobs** in the city.[79] The convention provided Cleveland a national platform to showcase the city as a unique and great place to live, work, play and visit. Promoting Cleveland as a travel destination also builds awareness and relationships in business sectors that are crucial to attracting investment.

Simply put, Cleveland's efforts to improve its public image and attract new visitors would not have been possible without investment in branding and tourism marketing.

Exploring Asheville, Inside and Out

Destination promotion efforts can create a positive image not just for potential tourists, but for potential businesses as well. Asheville, North Carolina is a world-class leisure destination. But Ben Teague of the Economic Development Coalition of Asheville-Buncombe County says that "past visits and good experiences open doors" to business prospects.

Asheville's image as an active, progressive, artsy, outdoorsy destination helped attract two of the country's largest craft breweries—Sierra Nevada and New Belgium. Asheville successfully marketed its quality of life, culture, environmental consciousness and business assets to attract other businesses as well. In addition to world-class craft breweries, Asheville also landed more than one billion in local investments to the community.

Beyond beer, both the destination marketing organization and economic development organization courted C-suite executives to bring the Outdoor Industry Association annual conference to the city in 2010. The exposure from this event, as well as the outdoor culture and qualified employment base, led Legacy Paddlesports to relocate to Asheville in 2012, **investing $4.5 million** in a new facility and hiring nearly 100 workers.[80]

Photos Courtesy of Asheville Convention and Visitors Bureau.

BUILDING U.S. MARKET SHARE IN THE **BOOMING INTERNATIONAL TRAVEL MARKET**

In 2015, **77.5 million** international travelers visited the United States.[81] Compared to approximately $650 spent by domestic travelers,[82] the average overseas visitor spends over **$4,000** on U.S. goods and services.[83] Not only do overseas visitors spend more, they also stay longer—averaging 18 nights per visit in 2014.[84]

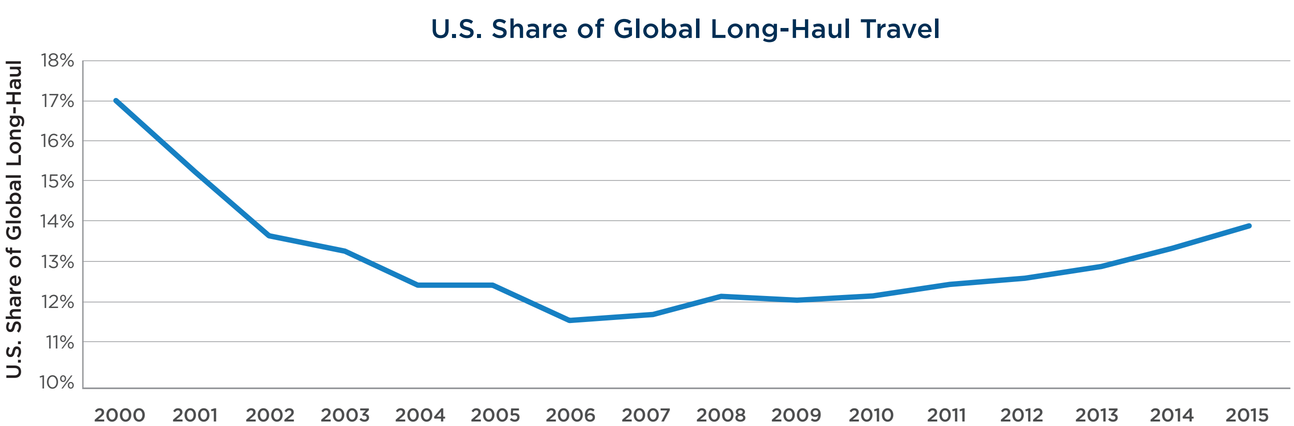
The lucrative international travel market already supports more than **one million** U.S. jobs.[85] Overall, international travel is America's second largest export industry and accounts for 11 percent of total U.S. exports of goods and services.[86]

These are very strong results. But there is still vast, untapped potential in the international travel market.

In 2015, more than 1.2 billion people traveled internationally and spent $1.5 trillion.[87] The U.S. share of this lucrative market stands at about 14 percent, down from 17 percent in 2000.[88]

Through a private-public partnership, Brand USA invests marketing dollars to promote the U.S. abroad and compete with other countries and destinations vying for lucrative international visitors. Brand USA has a significant impact on the U.S. economy by enhancing the image of the U.S. and inspiring travelers from abroad to visit destinations across the country.

Since 2010, programs such as Brand USA have promoted inbound travel to the U.S. and generated a steady increase of overseas arrivals. In 2015, total travel exports totaled **$246 billion**[89] in the U.S. and international visitors generated more than **$20 billion** in tax revenues.[90] Brand USA continues to play a pivotal role in increasing global awareness of U.S. destinations, attracting visitors to the U.S. and regaining the nation's share of international visitors.

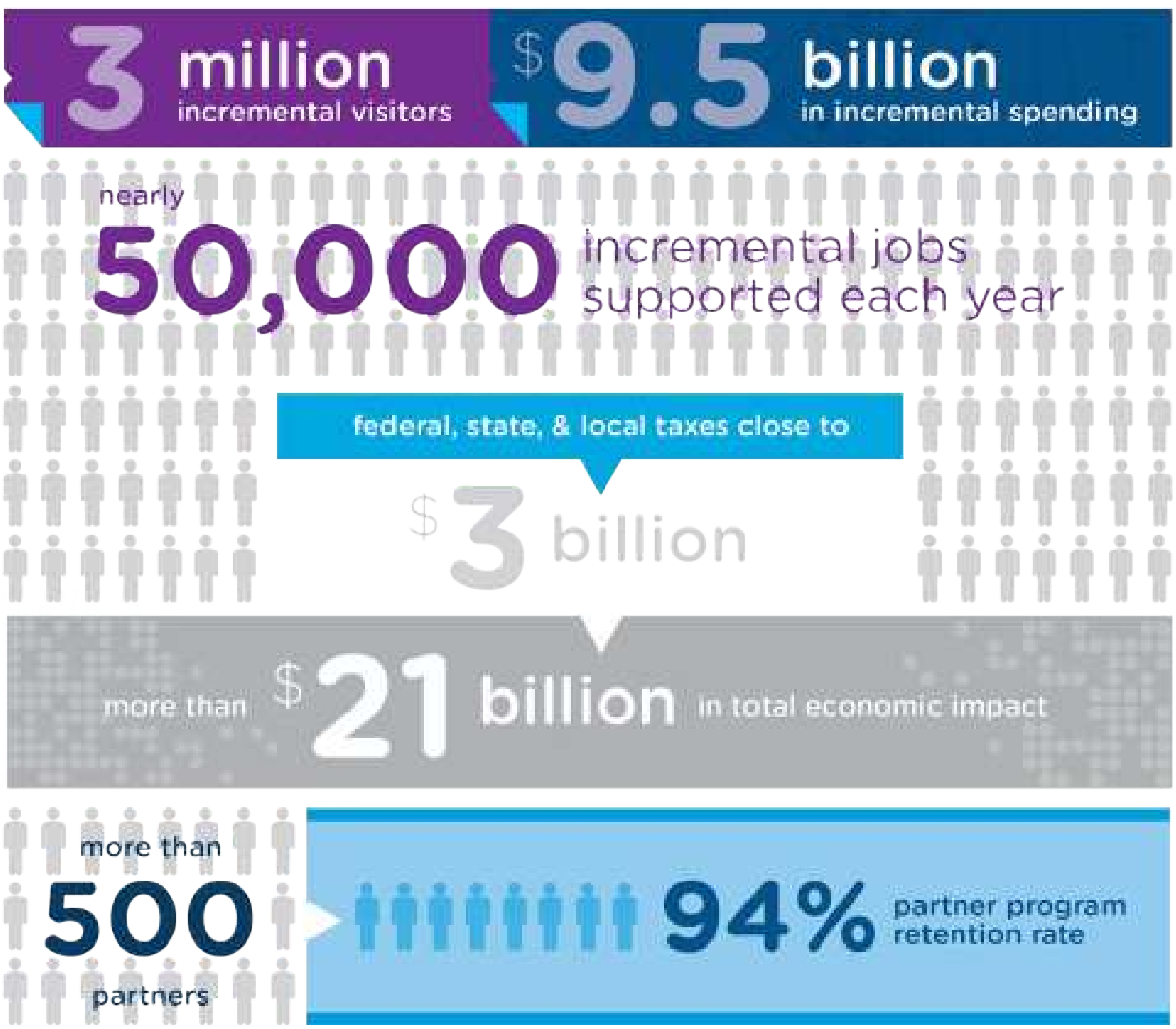


SOURCE: World Tourism Organization, National Travel and Tourism Office, 2016.

Visit TheUSA .com

Building on the success of Brand USA, increasing the share of international travel is critical to our nation's economy. Over the next five years, global travel is expected to surge by **300 million**, reaching 1.5 billion international visitors by 2020.[91] Countries around the world are competing fiercely to win visitors and benefit from this economic bonanza.

OVER THE PAST THREE YEARS, BRAND USA'S MARKETING EFFORTS HAVE GENERATED:

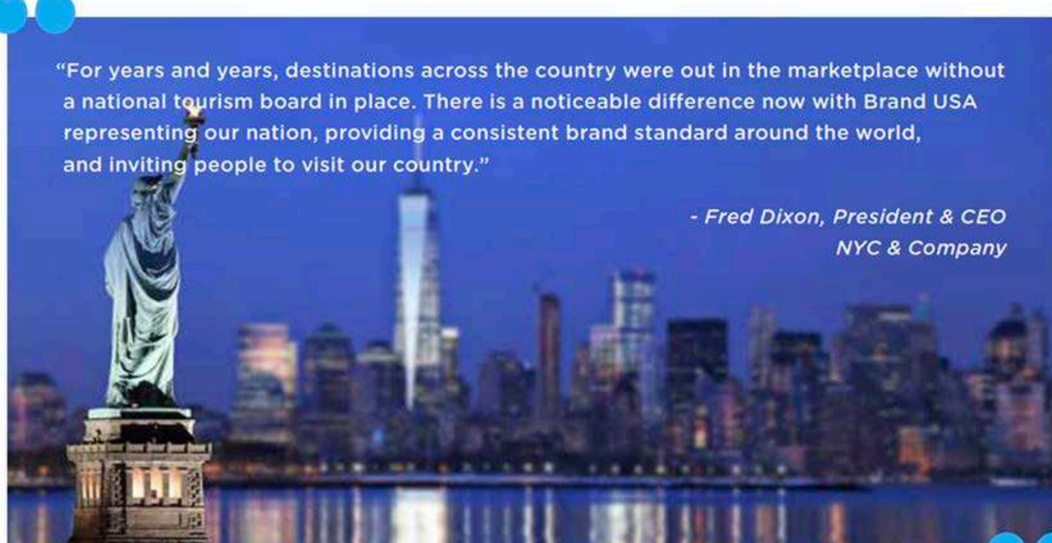


SOURCE: Brand USA, 2015.

LEVERAGING BRAND USA HELPS LOCAL DESTINATIONS **REACH INTERNATIONAL TRAVELERS**

Some U.S. regions, cities and destinations may believe they lack the resources to compete for international travelers—which makes Brand USA such a vital resource.

Brand USA has proven relationships, platforms and scalability to target inbound markets and inspire international visitors. By partnering with Brand USA, destinations across the U.S., regardless of size, can engage in cooperative marketing programs that create visibility and engagement among potential travelers.



Photos Courtesy of Brand USA.

Travel South USA: Partnering to Boost International Visitors

Travel South USA, the official destination marketing organization for 12 states in the southern U.S., has demonstrated that regional efforts and partnering with Brand USA can drive international travel in regional and local markets. As Liz Bittner, CEO of Travel South USA, put it, "The results we have been able to drive by working together have increased international visitation, visitor spending and tax revenue for the entire region of the South and speaks to the value and potential of 'going global.'"

Between 2013 and 2014, overseas visitors to the Travel South USA region[92] grew by more than 20 percent compared to 9 percent for the U.S. as a whole.[93] More importantly, the additional 432,000 visitors to the region stayed an average of 16 nights and spent **$465 million**, raising total overseas visitor spending to **$2.7 billion** in 2014 alone.[94]

Individual destinations have seen strong results. Jacquie Wansley, group marketing manager at World of Coca-Cola in Atlanta, GA, reports international visits to the attraction are up 29 percent over the past three years, while visits from China have **increased three-fold**.

"As a company known around the globe, we have seen a steady increase in visitation in recent years. However, we've experienced a boost over the past three years with a 29-percent increase in the number of guests visiting us from outside the United States. We look forward to continued partnership opportunities with our friends at Brand USA, Georgia Department of Economic Development and Atlanta Convention and Visitors Bureau to drive further, sustained growth in the number of international visitors to the region."

–Jacquie Wansley, group marketing manager, World of Coca-Cola, Atlanta, GA

Photos courtesy of Brand USA and Travel South USA.

Visit TheUSA.com

Travel South USA partnered with Brand USA to drive growth from markets like Western Europe. Brand USA's global campaign, "Discover the Flavors of the USA," promoted the unique cuisine of the south and showcased regional "foodie" hotspots. Travel South USA embraced the food campaign and launched marketing programs in more than 12 global markets via digital and traditional media.

The Brand USA partnership also allowed the region to participate in a number of media, trade and consumer events, including the American Food Pavilion at the World Expo in Milan, Italy. This marketing activity helped generate a 17-percent increase in new tour programs with Italian tour operators in 2014.[95]

Overall, arrivals from Western Europe to the southern U.S. increased by 23 percent between 2013 and 2014.[96] This notable growth reinforced the opportunity for U.S. regions outside of major cities to gain international visitors from markets already familiar with the U.S. to capitalize on their desire to see unfamiliar landmarks, nature and culture in cities outside the major gateways.

The region's success in attracting lucrative international visitors resulted from strategic investment. For the last five years, for example, Louisiana has doubled down on its international travel promotion, increasing investment from $578,000 in FY 2009-10 to $1.3 million in FY 2014-15.[97] Over the same period, South Carolina increased its marketing budget by 86 percent to $1.2 million.[98] Partnering with Brand USA allows these states to effectively leverage content and participate in unique, targeted programs that directly reach international visitors.

Total International Advertising and Promotion Budget

	2009-10	2014-15
Louisiana	$578,000	$1,345,000
South Carolina	$623,000	$1,158,000

SOURCE: U.S. Travel Association, 2016.

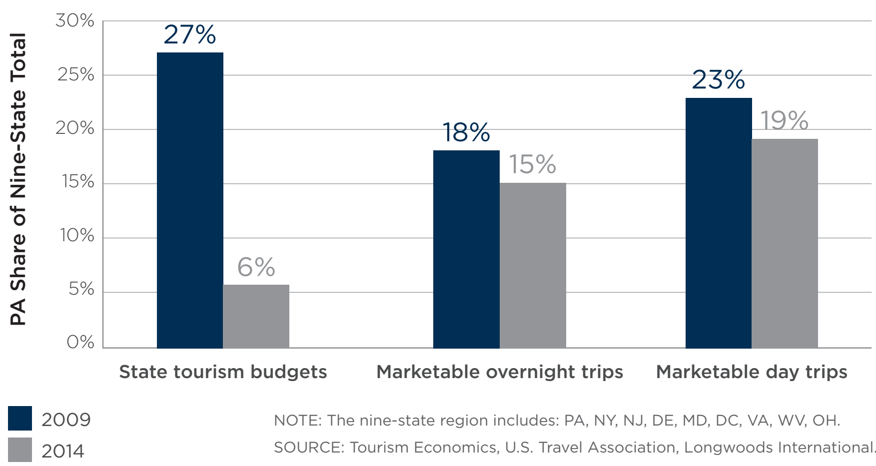
THE ECONOMIC RISKS OF CUTTING **TRAVEL PROMOTION**

The travel industry is essential to Pennsylvania's economy. In 2014, travelers spent **$24.4 billion** in the Keystone State, directly supporting nearly **225,000 jobs**.[99] Visitors to the state generated $3.6 billion in total tax revenue, including $1.4 billion in state and local taxes.[100] Without travel and tourism, the state unemployment rate would rise to 9.3 percent compared to the current 5.8 percent.[101] Since the start of the economic recovery in 2010, travel employment growth has contributed 11 percent of total Pennsylvania state employment growth.[102]

Even though travel has grown in recent years, Pennsylvania has been losing out to regional competitors. While many states have stepped up their marketing and promotion efforts, the Pennsylvania legislature has pursued a penny-wise/pound-foolish approach that has cost the state visitors, market share and tax revenues.

As recently as FY 2008-09, Pennsylvania spent more than $30 million on travel marketing and promotion efforts. The FY 2008-09 budget for the Commonwealth's office was competitive, representing 27 percent of their nine-state region.[103, 104] But when tax revenue slowed and budgets tightened, tourism was seen by policymakers as an easy target to cut. By FY 2014-15, tourism funding fell 77 percent to just $7 million, representing just 6 percent of the nine-state total.[105]

Pennsylvania's Share of Competitive State Total

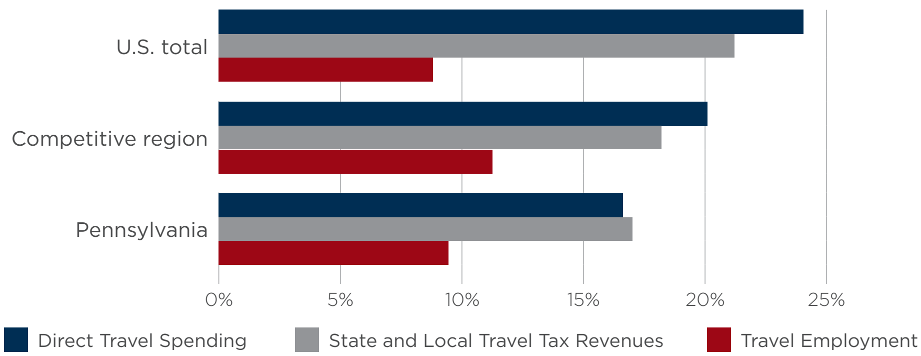


NOTE: The nine-state region includes: PA, NY, NJ, DE, MD, DC, VA, WV, OH.
SOURCE: Tourism Economics, U.S. Travel Association, Longwoods International.

Pennsylvania Representative Jerry Stern, Chairman of the House Tourism and Recreational Development Committee, has warned about the dangers of Pennsylvania's destination brand being "out of sight, out of mind when people are planning vacations." The impact of those budget cutbacks bear out his warning:

- **Declining Market Share:** In 2009, Pennsylvania attracted 18 percent of marketable overnight trips[106] within a nine-state region[107] and 23 percent of marketable day trips.[108] By 2014, that share had declined to 15 percent and 19 percent respectively.
- **Lost Tax Revenues:** Tourism Economics calculates that every dollar cut from the Pennsylvania tourism budget cost the state $3.60 in lost tax revenue.[109] Between 2009 and 2014, the state lost more than **$600 million** in state and local tax revenue that travelers would have generated had promotion been sustained.[110]
- **Falling Behind:** Between 2010 and 2014, direct travel spending increased 24 percent, and state and local tax revenues increased 22 percent across all 50 states.[111] Yet during this period, travel spending and state and local tax revenues increased by only 17 percent in Pennsylvania.[112]
- **Losing Out on Overseas Visitors:** Since 2007, overseas visitors to the U.S. increased by 44 percent, compared to just 19 percent in Pennsylvania.[113] If Pennsylvania had kept pace with U.S. growth since 2007, the state could have welcomed about 206,000 additional overseas visitors in 2014.

2014/2010 Growth Rates



NOTE: The nine-state region includes: PA, NY, NJ, DE, MD, DC, VA, WV, OH.

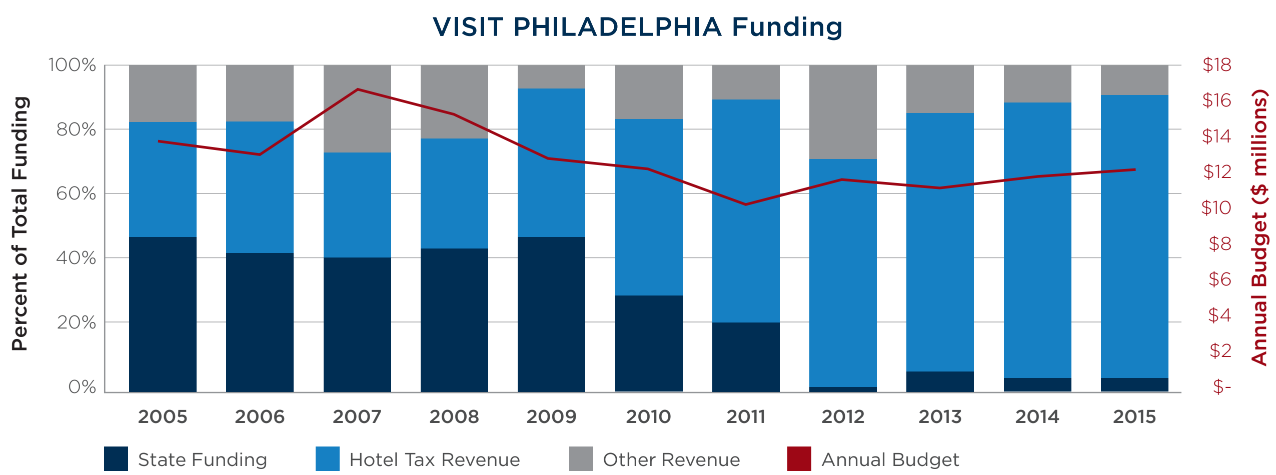
SOURCE: U.S. Travel Association.

To reverse this trend, a strong coalition of tourism marketing organizations in Pennsylvania published a report in the spring of 2016 outlining the economic losses the state has suffered from cutting travel promotion. The state tourism office is optimistic that funding will increase in 2016 and fully recover by 2017. Yet it will take years for Pennsylvania to recover the losses to the state's economy.

Decreases in funding at the state level affect all of the regions and cities within the Commonwealth. Not only has the state suffered economic losses, but local destinations' marketing efforts are limited without sustained funding.

VISIT PHILADELPHIA Responds

Prior to Pennsylvania's budget cuts in FY 2010, close to half of VISIT PHILADELPHIA's budget—$6.2 million per year—came from the state. Since then, state funding has comprised less than 8 percent of that budget. Instead of relying on state funding, nearly 80 percent of VISIT PHILADELPHIA's tourism funding comes from the local hotel tax, compared to 40 percent before the state budget cuts.



SOURCE: VISIT PHILADELPHIA, 2015.

To fill the void, VISIT PHILADELPHIA formed creative strategic partnerships with other organizations, leveraging the power of the *With Love, Philadelphia XOXO®* brand to access additional resources. These stop-gap efforts have been highly successful, helping Philadelphia achieve record visits for the past five years. The increase in visitors has helped VISIT PHILADELPHIA contribute to the city's economy, with more than **$6.7 billion invested** or planned for major developments in Center City.[114]

Nevertheless, the impact of the state's tourism budget cuts is still being felt. Prior to the 2010 cuts, Philadelphia regional visitation was growing approximately twice as fast as the U.S. overall. Since then, greater Philadelphia's visitation growth has been flat compared to U.S. growth.

To adjust to new budget realities, VISIT PHILADELPHIA has been forced to limit the geographic radius of its tourism advertising. Because of this, the marketing organization has not been able to tap lucrative markets such as Washington, D.C., which has one of the fastest-growing populations in the U.S. and is only a few hours by car or train from Philadelphia.

VISIT PHILADELPHIA's remarkable success in drawing visitors to the city despite a severely limited tourism budget offers a glimpse of

Photos courtesy of VISIT PHILADELPHIA.

the possibilities if the state steps up with additional funding. All the stars are aligned for Philadelphia to emerge as one of the world's great travel destinations. The City of Brotherly Love hosts some of the nation's most important historical sites. *Lonely Planet* named Philadelphia the No. 1 U.S. city to visit in 2016, and both *Fodor's* and *Huffington Post* cited Philadelphia one of the top destinations to experience this year. In 2015, Philadelphia was designated the first UNESCO World Heritage City in the U.S and hosted the Pope during the World Meeting of Families conference. In addition, during the summer of 2016, Philadelphia hosted the Democratic National Convention, which was responsible for generating **$300 million** in economic output and supporting **1,800 additional jobs** in Philadelphia.[115]

But in order to fully leverage Philadelphia's incredible tourism assets, draw new visitors and drive further growth in the regional and state economy, greater state investment in marketing and promotion is critical. With increased funding, VISIT PHILADELPHIA has the potential to break into additional, high-yield markets and capture greater market share as travel demand continues to rise nationally.

San Diego: Weathering the Storm

TOURISM AUTHORITY

With nearly 34 million visitors generating nearly **$10 billion** in spending in 2015, the travel industry is the second largest private-sector industry in San Diego.[116] The travel industry supported **183,000 San Diegan jobs**, while visitor spending generated more than **$700 million** in state and local taxes.[117]

Given travel's pre-eminent role in supporting the region's economy, it seems obvious that investment in travel promotion would be a top priority. Yet in recent years, the travel promotion budget has become a political football, with many city officials reluctant to support an industry that sustains so many jobs and businesses.

Since 2008, the San Diego Tourism Authority (SDTA) has not received transient occupancy tax funding and has instead relied on Tourism Marketing District (TMD) funding from the lodging industry. In 2007-08, the TMD generated $24.5 million for tourism promotion and related projects.[118]

In 2013, San Diego's new Mayor Bob Filner made the decision to withhold the five-year TMD operating agreement extension, resulting in an immediate 83-percent reduction in SDTA funding from $23 million in 2012 to just $4 million.[119] As a result, 40 percent of SDTA staff was laid off and sales and marketing campaigns were cancelled.[120] The absence of direct marketing to leisure consumers had an immediate effect on leisure spring break travel in the first quarter of 2013 and affected both leisure and group business over time as bookings decreased and business and leisure visitors made plans to go elsewhere.[121]

In response, the SDTA launched an aggressive "Why Travel Matters" campaign to educate local leaders on the value of tourism and its impact on San Diego's economy. The organization leveraged National Travel and Tourism Week to create a media blitz through local news stations and online contests. An "I Am Tourism" program created videos featuring local workers in the tourism sector to raise the profile of the industry among political officials. The SDTA generated significant exposure and pressure on the city council.

The plan worked. Under intense pressure in May 2013, the mayor released FY 2013 funds to the SDTA. In November, the city council voted to restore TMD funds. Interim Mayor Todd Gloria showed support for the industry and announced that "San Diego is back in the game."

> "This year, we're going to sell this city in every way possible. We're going to be on TV. We're going to be online. We're going to be in print and special promotions."
>
> **–San Diego Interim Mayor Todd Gloria**

Photos courtesy of San Diego Tourism Authority.

Photo Credit: John Bahu.

Despite this victory, the funding fiasco caused significant damage to the region's economy. In 2013, both occupancy rates and room prices increased more slowly than other competitive markets. San Diego's hotel sector lost $63 million in room revenues.[122] Beyond the lodging sector, total losses to the San Diego regional economy amounted to $560 million in lost visitor spending and $24 million in reduced tax revenues. The retail, restaurant, entertainment and transportation sectors were all hard-hit.[123]

San Diego is a classic example of the negative consequences of playing politics with tourism funding. Educating elected officials on the significant economic benefits of the travel industry remains paramount. The value of tourism goes beyond the businesses directly benefitting and adds value to residents and communities by reducing tax burdens, funding infrastructure and supporting public service jobs, such as police officers and firefighters.

Destinations that fail to invest consistently in travel promotion will see visitors—and jobs and tax revenues—go elsewhere.'

KEY TAKEAWAYS

Today, travel remains a central pillar of the U.S. economy. The industry drives economic growth, creates jobs and generates much needed tax revenue for local communities. And while states' and local governments' budgets for tourism promotion fluctuate from year to year, investment in travel promotion never fails to drive new visitors to destinations and deliver economic benefits to communities across the country.

This report offers five key insights on the impact and benefits of travel promotion:

1. **Travel gives back to local communities.**
   Travel and tourism creates jobs and generates tax revenue for local communities, which in turn, help pay for important public services.

2. **Investment in travel promotion helps destinations compete and thrive.**
   In an increasingly competitive travel market, the destinations that prioritize travel promotion benefit from increased visitation.

3. **Enhanced travel-related offerings help states and destinations attract visitors and businesses.**
   Destinations that are able to provide a range of offerings are not only likely to draw more visitors, but also attract new businesses and skilled workers.

4. **Brand USA boosts tourism to the United States.**
   Since its inception in 2011, Brand USA has played a major role in marketing the U.S. as a destination and helped bring millions of international travelers to U.S. shores. Destinations partnering with Brand USA have the ability to utilize their existing relationships, platforms and marketing programs to increase their visibility and engagement with potential travelers.

5. **Decreases in travel promotion investments have an immediate and long-term negative impact.**
   Time and again, destinations that have reduced their investments in travel promotion have seen a drop in overall visitation and missed out on potential economic benefits.

ENDNOTES

1. Nashville International Airport, 2016. https://flynashville.com/flights/Pages/default.aspx
2. U.S. Travel Association, 2016.
3. U.S. Department of Commerce, National Travel and Tourism Office, 2015.
4. UNWTO, 'UNWTO Tourism Highlights, 2016,' 2016. http://mkt.unwto.org/publication/unwto-tourism-highlights-2016-edition
5. U.S. Travel Association, 2016.
6. U.S. Travel Association, 2016.
7. U.S. Travel Association, 2016.
8. Longwoods International, 'A Perfect Combination: Destination Marketing and Economic Development: Creating a Singular Place Brand,' March 2015. http://longwoods-intl.com/wp-content/uploads/2015/03/Longwoods-DMAI-Destination-Promotion-and-Economic-Development-Summary.pdf
9. Oxford Economics, 'Destination Promotion: An Engine of Economic Development,' November 2014.
10. Oxford Economics, 'Destination Promotion: An Engine of Economic Development,' November 2014.
11. AdAge, 200 Leading National Advertisers, 2015.
12. U.S. Travel Association, 2015.
13. AdAge, 200 Leading National Advertisers, 2015.
14. U.S. Travel Association, 2015.
15. USA Today, 'For the Win – Stunning Infographic Charts the Skyrocketing Cost of a Super Bowl Ad,' February 6, 2016. http://ftw.usatoday.com/2016/02/how-much-does-super-bowl-ad-cost
16. Center for Responsive Politics, May 3, 2016. http://www.opensecrets.org/overview/
17. Center for Responsive Politics, May 3, 2016. http://www.opensecrets.org/overview/
18. Jay Chiat Awards, 'Under Armour: 'I Will What I Want,' 2015.
19. Jay Chiat Awards, 'Under Armour: 'I Will What I Want,' 2015.
20. Jay Chiat Awards, 'Under Armour: 'I Will What I Want,' 2015.
21. Jay Chiat Awards, 'Under Armour: 'I Will What I Want,' 2015.
22. Gender, Leisure and Sport, 'I Will What I Want Campaign: You Don't Need Permission When You Have Will,' March 25, 2015. https://genderleisureandsport.wordpress.com/2015/03/25/i-will-what-i-want-campaign-you-dont-need-permission-when-you-have-will/
23. Forbes, 'Is Under Armour Losing Favor With Women?' January 11, 2016. http://www.forbes.com/sites/laurengensler/2016/01/11/under-armour-women-sales/#89ac674482d1
24. U.S. Travel Association, 2016.
25. U.S. Department of Commerce, 2016.
26. U.S. Travel Association, 2016.
27. U.S. Travel Association, 2016.
28. U.S. Department of Labor and U.S. Travel Association, 2016.
29. U.S. Department of Labor and U.S. Travel Association, 2016.
30. U.S. Department of Labor and U.S. Travel Association, 2016.
31. U.S. Department of Labor and U.S. Travel Association, 2016.
32. U.S. Department of Labor and U.S. Travel Association, 2016.
33. U.S. Travel Association, 'Fast Forward: Travel Creates Opportunities and Launches Careers,' December 2013. https://www.ustravel.org/research/fast-forward-travel-creates-opportunities-and-launches-careers
34. Bureau of Labor Statistics, Current Population Survey, 2016.
35. U.S. Travel Association, 'Fast Forward: Travel Creates Opportunities and Launches Careers,' December 2013. https://www.ustravel.org/research/fast-forward-travel-creates-opportunities-and-launches-careers
36. U.S. Travel Association, 2016.
37. U.S. Travel Association, 2016.
38. U.S. Travel Association, 2016.
39. U.S. Travel Association, 2016.
40. Longwoods International, 'A Perfect Combination: Destination Marketing and Economic Development: Creating a Singular Place Brand,' March 2015. http://longwoods-intl.com/wp-content/uploads/2015/03/Longwoods-DMAI-Destination-Promotion-and-Economic-Development-Summary.pdf
41. Longwoods International, 'New Mexico 2012 Tourism Advertising Evaluation Study,' December 2012.
42. Longwoods International, 'New Mexico 2012 Tourism Advertising Evaluation Study,' December 2012.
43. Longwoods International, 'New Mexico Tourism Advertising ROI Study,' July 2015.
44. Longwoods International, 'New Mexico Tourism Advertising ROI Study,' July 2015.
45. New Mexico True, 'New Research Shows New Mexico True Campaign Vastly Improves Perception of State,' July 27, 2015. http://longwoods-intl.com/wp-content/uploads/2015/07/New-Mexico-True_ROI-and-Halo-Effect-Press-Release.pdf
46. New Mexico True, 'New Research Shows New Mexico True Campaign Vastly Improves Perception of State,' July 27, 2015. http://longwoods-intl.com/wp-content/uploads/2015/07/New-Mexico-True_ROI-and-Halo-Effect-Press-Release.pdf
47. Tourism Economics, 'The Economic Impact of Tourism in New Mexico, 2014 Analysis,' August 2015.
48. New Mexico Tourism Department, 2016.
49. New Mexico Tourism Department, 2016.
50. U.S. Travel Association 2016.
51. Longwood's International, 'Lake Erie Shores & Islands 2014 Tourism Advertising Evaluation Study,' February 2015.
52. Lake Erie Shores & Islands Press Release, 'Lake Erie Love Advertising Campaign Produces Return on Investment,' March 31, 2015. http://www.shoresandislands.com/media/research.aspx
53. Longwoods International, 'Lake Erie Shores & Islands 2014 Tourism Advertising Evaluation Study,' February 2015.
54. Longwoods International, 'Lake Erie Shores & Islands 2014 Tourism Advertising Evaluation Study,' February 2015.

ENDNOTES (Continued)

55. Oxford Economics, 'Destination Promotion: An Engine of Economic Development,' November 2014.
56. Oxford Economics, 'Destination Promotion: An Engine of Economic Development,' November 2014.
57. Oxford Economics, 'Destination Promotion: An Engine of Economic Development,' November 2014.
58. Skift, 'Measuring the Real Impact of Destination Marketing Organizations,' December 22, 2014. https://skift.com/2014/12/22/measuring-the-real-impact-of-destination-marketing-organizations/
59. Oxford Economics, 'Destination Promotion: An Engine of Economic Development,' November 2014.
60. Nashville Convention and Visitors Corporation, '2015 Year in Review,' May 3, 2016. http://www.visitmusiccity.com/KLYearInReview5.6.pdf
61. Nashville Convention and Visitors Corporation, '2015 Year in Review,' May 3, 2016. http://www.visitmusiccity.com/KLYearInReview5.6.pdf
62. PR NewsWire, 'Music City Center in Nashville Drives Economic Success, According to tvsdesign,' January 7, 2014. http://www.prnewswire.com/news-releases/music-city-center-in-nashville-drives-economic-success-according-to-tvsdesign-239134821.html
63. Nashville Convention and Visitors Corporation, 'Music City Center Bookings Exceed One Million Room Nights,' May 20, 2013. http://www.visitmusiccity.com/media/pr_mcc1million
64. PR NewsWire, 'Music City Center in Nashville Drives Economic Success, According to tvsdesign,' January 7, 2014. http://www.prnewswire.com/news-releases/music-city-center-in-nashville-drives-economic-success-according-to-tvsdesign-239134821.html
65. PR NewsWire, 'Music City Center in Nashville Drives Economic Success, According to tvsdesign,' January 7, 2014. http://www.prnewswire.com/news-releases/music-city-center-in-nashville-drives-economic-success-according-to-tvsdesign-239134821.html
66. Nashville Convention and Visitors Corporation, '2015 Year in Review,' May 3, 2016. http://www.visitmusiccity.com/KLYearInReview5.6.pdf
67. Nashville Convention and Visitors Corporation, '2015 Year in Review,' May 3, 2016. http://www.visitmusiccity.com/KLYearInReview5.6.pdf
68. Nashville International Airport, 2016. https://flynashville.com/flights/Pages/default.aspx
69. Nashville Public Radio, 'Why Nashville Newcomers Move Without Jobs Lined Up,' October 16, 2015. http://nashvillepublicradio.org/post/why-many-nashville-newcomers-move-without-jobs-lined#stream/0
70. Nashville Public Radio, 'Why Nashville Newcomers Move Without Jobs Lined Up,' October 16, 2015. http://nashvillepublicradio.org/post/why-many-nashville-newcomers-move-without-jobs-lined#stream/0
71. Destination Cleveland, '2014 Convention and Leisure Tourism Metrics Report', 2014. http://www.thisiscleveland.com/includes/content/docs/media/Metrics-Report-2014-YE---page.pdf
72. Destination Cleveland, '2014 Convention and Leisure Tourism Metrics Report,' 2014. http://www.thisiscleveland.com/includes/content/docs/media/Metrics-Report-2014-YE---page.pdf
73. Destination Cleveland, '2014 Convention and Leisure Tourism Metrics Report,' 2014. http://www.thisiscleveland.com/includes/content/docs/media/Metrics-Report-2014-YE---page.pdf
74. Tourism Economics, 'The Economic Impact of Tourism in Cuyahoga County, Ohio,' June 2016.
75. Tourism Economics, 'The Economic Impact of Tourism in Cuyahoga County, Ohio,' June 2016.
76. Destination Cleveland, '2014 Convention and Leisure Tourism Metrics Report,' 2014. http://www.thisiscleveland.com/includes/content/docs/media/Metrics-Report-2014-YE---page.pdf
77. Destination Cleveland, '2014 Convention and Leisure Tourism Metrics Report,' 2014. http://www.thisiscleveland.com/includes/content/docs/media/Metrics-Report-2014-YE---page.pdf
78. Destination Cleveland, '2014 Convention and Leisure Tourism Metrics Report,' 2014. http://www.thisiscleveland.com/includes/content/docs/media/Metrics-Report-2014-YE---page.pdf
79. U.S. Travel Association, 2016.
80. Blue Ridge Now, 'Legacy Paddlesports Moving to Fletcher,' January 6, 2012. http://www.blueridgenow.com/article/20120106/ARTICLES/120109888?p=1&tc=pg
81. U.S. Department of Commerce, National Travel and Tourism Office, 2015.
82. TNS TravelsAmerica, 2015.
83. U.S. Department of Commerce, National Travel and Tourism Office, 2015.
84. U.S. Department of Commerce, National Travel and Tourism Office, 2015.
85. U.S. Travel Association, 2016.
86. U.S. Department of Commerce, National Travel and Tourism Office, 2015.
87. UNWTO, 'UNWTO Tourism Highlights, 2016,' 2016. http://mkt.unwto.org/publication/unwto-tourism-highlights-2016-edition
88. U.S. Travel Association, 2016.
89. U.S. Department of Commerce, 2016.
90. U.S. Travel Association, 2016.
91. Oxford Economics, 2016.
92. Travel South USA region states include: Missouri, Arkansas, Louisiana, Mississippi, Alabama, Georgia, South Carolina, North Carolina, Tennessee, Kentucky, Virginia and West Virginia.
93. U.S. Department of Commerce, National Travel and Tourism Office, 2015.
94. Travel Market Insights, Inc., 'Travel South USA Overseas Visitor Report, 2014,' www.travelmi.com.
95. Travel South reported figures from survey of Italian travel trade partners, 2015 – 2016.
96. Travel Market Insights, Inc., 'Travel South USA Overseas Visitor Report, 2014,' www.travelmi.com.
97. U.S. Travel Association, 'State Tourism Office Budget Report,' 2015.
98. U.S. Travel Association, 'State Tourism Office Budget Report,' 2015.
99. U.S. Travel Association, 2016.

100. U.S. Travel Association, 2016.
101. U.S. Travel Association, 2016.
102. U.S. Travel Association, 2016.
103. Tourism Economics, 'Competitive Analysis of Pennsylvania's Tourism Budget,' December 2015.
104. The nine-state region includes: PA, NY, NJ, DE, MD, DC, VA, WV, OH.
105. Tourism Economics, 'Competitive Analysis of Pennsylvania's Tourism Budget,' December 2015.
106. Marketable overnight trips – overnight trips to the state excluding visiting friends and family or mixed business- leisure purposes.
107. The nine-state region includes: PA, NY, NJ, DE, MD, DC, VA, WV, OH.
108. Tourism Economics, 'Competitive Analysis of Pennsylvania's Tourism Budget,' December 2015.
109. Tourism Economics, 'Competitive Analysis of Pennsylvania's Tourism Budget,' December 2015.
110. Tourism Economics, 'Competitive Analysis of Pennsylvania's Tourism Budget,' December 2015.
111. U.S. Travel Association, 2016.
112. U.S. Travel Association, 2016.
113. Tourism Economics, 'Competitive Analysis of Pennsylvania's Tourism Budget,' December 2015.
114. University City District, 'The State of University City 2016,' 2015. http://www.universitycity.org/sites/default/files/documents/The%20State%20of%20University%20City%202016_0.pdf
115. U.S. Travel Association, 2016.
116. San Diego Tourism Authority, 'San Diego County 2016 Visitor Industry General Facts,' 2016.
117. San Diego Tourism Authority, 'San Diego County 2016 Visitor Industry General Facts,' 2016.
118. San Diego Tourism Authority, 'Tourism: San Diego's 2nd Largest Traded Economy, A White Paper Discussion,' April 2, 2013. http://www.sandiego.org/campaigns/national-travel-and-touism-week/why-travel-matters.aspx
119. San Diego Tourism Authority, 'Weathering the Storm,' 2014.
120. San Diego Tourism Authority, 'Weathering the Storm,' 2014.
121. Tourism Economics, 'The Impact of Reduced Funding for the San Diego Tourism Marketing District,' November 19, 2013.
122. Tourism Economics, 'The Impact of Reduced Funding for the San Diego Tourism Marketing District,' November 19, 2013.
123. Tourism Economics, 'The Impact of Reduced Funding for the San Diego Tourism Marketing District,' November 19, 2013.

The U.S. Travel Association is the national, non-profit organization representing all components of the travel industry that generates $2.1 trillion in economic output and supports 15.1 million jobs. U.S. Travel's mission is to increase travel to and within the United States. Visit **www.ustravel.org.**

1100 New York Avenue, NW Suite 450 Washington, D.C. 20005 TEL 202.408.8422 www.ustravel.org
UPDATED JANUARY 2017