


MADE IN AMERICA



Travel's Essential Contribution to Economic Development





U.S. TRAVEL
ASSOCIATION

The U.S. travel industry is at a critical juncture. A decrease in global market share beginning in 2016 means America is falling behind the competition for international travelers. The global travel marketplace is highly lucrative, and it is more important now than ever before that we keep American destinations top of mind for travelers, both in the U.S. and abroad.

Destination marketers are instrumental in the success and growth of travel and are critical to delivering its myriad of benefits. They do far more than promote their communities. Increasingly, their value extends from marketing into management. When done well, the work of destination marketers builds/boosts local economies and creates and sustains jobs for residents.

In my position, I have a front-row seat to the work of hundreds of destination marketers. I have seen them play instrumental roles in shaping bids to attract new businesses to their areas. I have watched them use their expertise to attract a best-in-class workforce that will define the long-term economic health of a city. I have also observed their hand in developing rural communities and lifting up small businesses.

In challenging political environments, state and destination marketing budgets are finding themselves a frequent target. Cutting or eliminating public funding is a short-sighted decision with long-term ramifications. The tax revenue from visitors to a destination is pure profit for a locality or state. Without these visitor offsets, those dollars would have to come from the pockets of residents. But with them, essential services like police and firefighters, teachers, hospitals and infrastructure come at a lower cost to the community.

To ensure this powerful economic engine can deliver the massive returns that benefit local residents most, a destination needs to cultivate and promote a strong brand. The sights, attractions, activities and culture are like instruments in the orchestra. They sound wonderful on their own, but the destination brand is what brings them together to play a symphony.

The following report has clear examples that show the power of a strong destination marketing organization and the danger of undervaluing this essential part of any community's economic development strategy.

Sincerely,

Roger

Roger Dow
President and CEO
U.S. Travel Association

INTRODUCTION

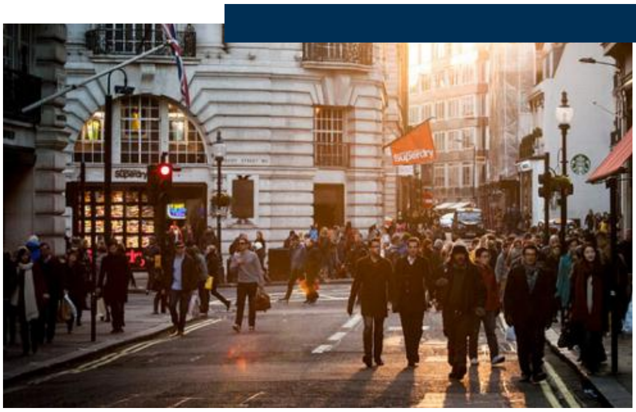
The word travel connotes going to far-off places. But travel affects the lives of Americans every day, right in their own backyard.

Though sometimes unseen by the communities it serves, travel helps create a sense of place and is inextricably linked to economic development. As a job creator, tax revenue generator and destination storyteller, travel has ripple effects that touch the lives of millions of Americans.

The destination marketers charged with promoting travel—tourism offices, convention and visitors bureaus and destination marketing organizations—have an essential role in the development and growth of their communities.

When businesses make decisions about where to establish or relocate, quality of life is one of the most significant influencers. Is there a good restaurant scene? Are there cultural experiences in the area? How walkable is the city? It is the destination marketer who is best positioned to tell the story and illustrate the value proposition of a place.

Another key factor is the ability to attract and retain talent. Is the city a place that top talent wants to work and live? Travel is the first impression for talent. No matter how strong a company's reputation, very few prospective candidates relocate for a new job without visiting and experiencing a place firsthand.



The more support and investment in travel promotion a destination marketer has, the stronger the financial returns. Travel-related tax revenues are pure profit, generated by visitors who do not require essential public services of a destination. Without the tax revenue from travel, community residents would be required to shoulder a higher tax burden to pay for police and firefighters, teachers, infrastructure and more.

Investing in travel promotion is investing in economic development. A strong destination brand does more than build awareness; it engenders affinity that can lead to more visitors, and by attracting businesses and talent, it helps create a thriving community. Cutting a destination's tourism marketing budget—in whole or in part—is a short-sighted decision that undermines a city or state's viability in ways that takes years, if not decades, to overcome.

The most successful places in America bring all stakeholders to the table. **Local and state legislators, economic development organizations, and destination marketers all play a critical role in elevating the community.** When done right, it leads to a positive and lasting change that is meaningful to residents and visitors alike.

SECTION I: TRAVEL'S ESSENTIAL ROLES

SECTION II: WHY BRANDING MATTERS

CONTENTS

The Travel Industry Drives Economic Growth and Jobs in America

The travel industry is a primary driver of economic growth and job creation in the United States. Effective travel promotion leads to increased economic activity, well-paying jobs and crucial tax revenue supporting essential public services.

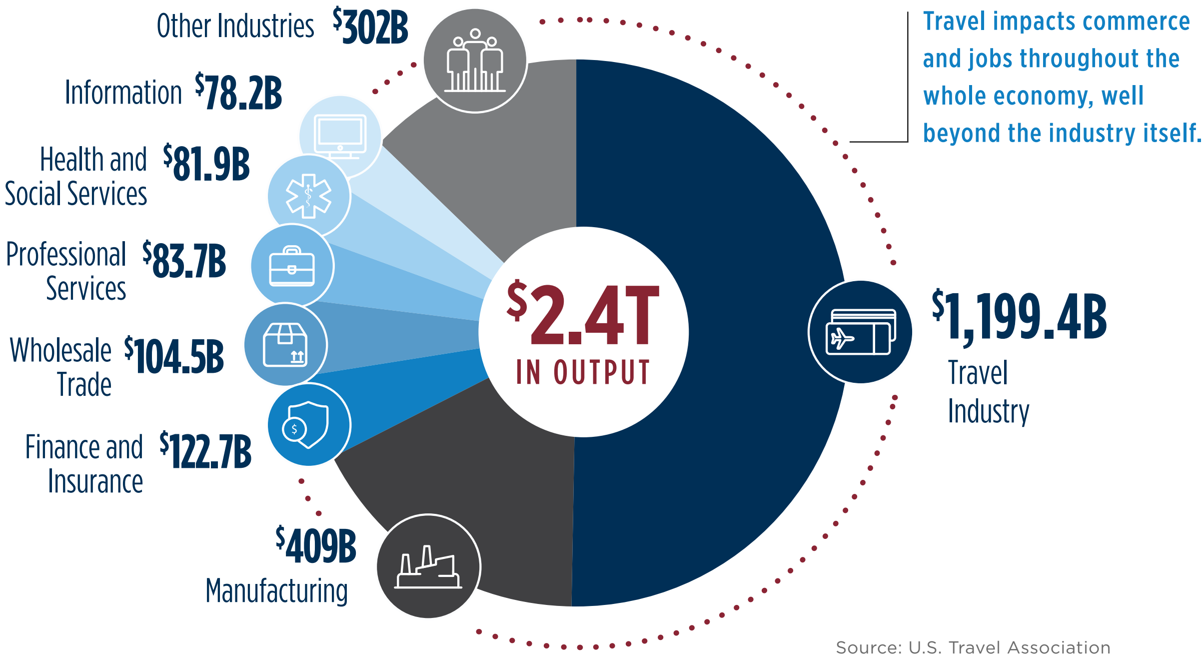
In 2017, the travel industry generated $2.4 trillion for the U.S. economy, supporting 15.6 million American jobs. One in nine U.S. jobs directly and indirectly rely on the travel industry.

When travel thrives,
so does America.

Travel's Downstream Impact

Travelers generate gains for the entire U.S. economy. Aside from the spending on goods and services during trips, the business and materials necessary to produce these goods and services can be considered an indirect travel output. For example, the fruits and vegetables purchased by restaurants or linens used by hotels all have a positive economic impact for industries outside of travel.

Additionally, spending in local areas by the employees of travel businesses and their suppliers generates sales: induced output. For example, the gasoline purchased by employees to get to their jobs is considered an induced output.



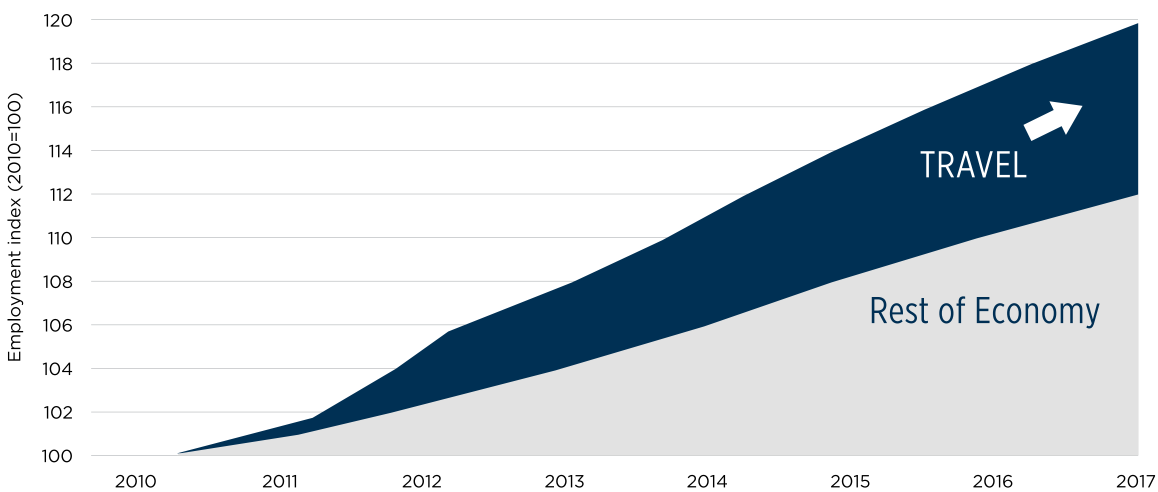
Source: U.S. Travel Association

Travel: An Indispensable Source of American Jobs

As a labor-intensive industry, the power of travel to create jobs is much greater than other industries. **On average, every $1 million in travel goods and services sales directly supports eight jobs. In contrast, on average, every $1 million in sales in other industries directly supports five jobs.**

While certainly not immune to the negative effects of recession or other economic downturns, the travel industry is resilient, bouncing back before other industries and generally creating jobs faster than other sectors of the economy. From 2010-2017, the travel industry added 1.5 million jobs—an increase of 20 percent, significantly outpacing the 12 percent employment increase in the rest of the economy. Nine percent of all new jobs created during this period were in the travel industry.

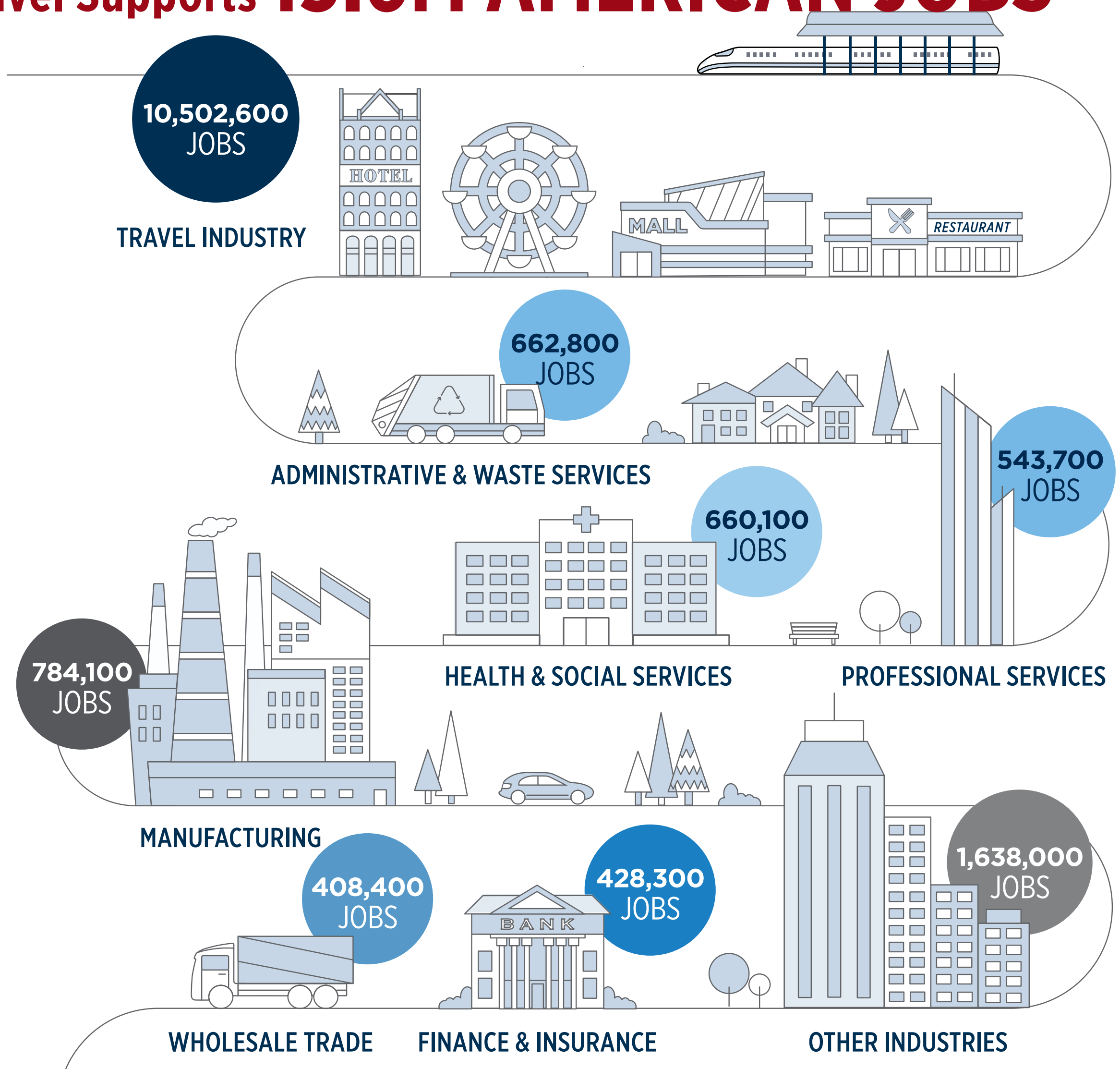
Travel Outpaces Rest of Economy in Employment Growth



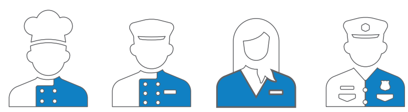
Source: U.S. Department of Labor and U.S. Travel Association

Travel jobs are unique: the industry is highly dependent on human labor and generally immune to outsourcing abroad. The majority of employees earn middle-class wages or higher.[1] For many young workers, a travel job means a first foothold on the career ladder. For part-time students, a travel job means the flexibility to pursue education and training while gaining the benefit of on-the-job experience.[2] For workers at all stages of life, travel provides a viable path of upward mobility. On average, Americans whose first job was in the travel industry obtained an average career salary of $81,900, higher than those who began working in most other industries.[3]

Travel Supports 15.6M AMERICAN JOBS



Source: U.S. Travel Association



Travel jobs are unique: the industry is highly-dependent on human labor and generally immune to outsourcing abroad.

Travel impacts commerce and jobs **throughout the whole economy, well beyond the industry itself.** U.S. Travel's **Downstream Impact Calculator** allows you to simulate this change and its effect throughout the U.S. economy.

Travel Impacts Communities Across America

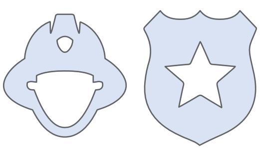
KEY TAKEAWAY

Investing in tourism promotion stimulates visitor demand, which in turn generates tax revenue benefiting local residents. Lawmakers and community leaders who understand and invest in the value of travel are able to reduce the tax burden on their constituents and are in a more favorable financial position to fund essential services that make their communities stronger.

States, destinations and communities across the country rely on travel—and traveler spending—for economic development, job creation and tax revenues. The travel industry is a significant economic driver in **every congressional district** across the country. Within 344 out of 435 congressional districts (79%), the travel industry was among the top seven largest employers among all private industries in 2016.[4]

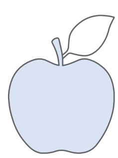
Travel spending generated $165 billion in total tax revenue, including $76 billion in state and local tax revenue, in 2017. Without these revenues, each U.S. household would pay $1,300 more in taxes every year.[5] This is pure profit for a local economy.

The **$76 billion** generated in state and local tax revenue is enough to pay for a host of resources:



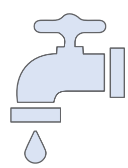
The salaries of all **320,000** state and local firefighters and **662,000** state and local police officers across the U.S. **combined**.[6]

OR



The salaries of every single one of the **one million public high school teachers,** or 39 percent of all public school teacher wages across the country.[7]

OR



Fifty-eight percent of **state** and **local governments' capital spending** on transportation and water infrastructure nationwide.[8]

OR

The cost of educating **5.6 million of the 50 million students (11%)** enrolled in elementary and secondary public schools across the country.[9]

CASE STUDY

PHOTO CREDITS: ARIZONA OFFICE OF TOURISM

"[Un]Real Arizona" Achieves Real Results

Arizona's warm weather and natural beauty made tourism the state's number one export in 2016, with 43 million visitors collectively spending $21.2 billion in the state.[10] **The revenue generated from travelers directly supported 184,000 jobs and generated $3.1 billion in tax revenues—saving every Arizona household close to $1,200.**[11]

Arizona's Governor Doug Ducey is a strong advocate for the industry, understanding the many benefits it brings to his state. He continually supports investing in tourism promotion because he sees the value firsthand.

Nationally, the digital campaign returned **$33.22 in hotel revenue per dollar of advertising spend.**

"Arizona is consistently **one of the 10 most-visited states in America**, and it is the only one that's home to one of the Seven Natural Wonders of the World. We are blessed with an amazingly beautiful and diverse tourism product in Arizona, **but competition for visitor dollars is fierce and global**. To elevate Arizona's brand and continue to grow the state's $21 billion tourism industry, the Arizona Office of Tourism has been a trailblazer when it comes to **forging brand partnerships, adopting new technologies and pursuing data-driven advertising strategies**. The result has been more visitors, more tax revenue and more job growth."

– Arizona Governor Doug Ducey

With the support of the governor, Arizona Office of Tourism launched a new advertising campaign—"[Un]Real Arizona"—in 2018. The campaign strategically targeted four cities where research showed market share gains were most attainable. **Nationally, the digital campaign returned $33.22 in hotel revenue per dollar of advertising spend.**

Collaboration Creates Attractive Communities—for Both Residents and Visitors

KEY TAKEAWAY

Investing in the improvement of a destination makes it more attractive to visitors, but also to talent. What may begin as an effort to bolster the livability of a place can turn into a travel boom that offsets costs and creates an unexpected tourism economy with lasting value.

Communities that invest in creating a place where people want to spend their time—whether it be for a weekend, a semester or a lifetime—will gain long-term dividends. Meaningful economic development that leads to attracting businesses, talent and visitors requires cooperative partnerships with all stakeholders in an area: lawmakers, public officials, city planners; the business community; chambers of commerce; and tourism offices or destination marketing organizations. The diversity of the American landscape, cultures and heritages provide the preexisting infrastructure to build on and promote, but every community leader must do their part to shape and share their story.

The ability to attract and retain a skilled workforce remains a top factor in business location decisions, particularly in a tight labor market. **Attractive job opportunities capture talent's attention, but travel is the first step in shaping perception.** No matter how strong a reputation an organization or community has, few people would move to a new location without visiting or experiencing it firsthand.[12]

According to a recent Development Counsellors International (DCI) survey of 1,000 working-age individuals to understand how talent assess new job opportunities and relocation decisions, **more than three-quarters (76%) of employed Americans indicated that firsthand experience was instrumental in forming impressions of a community**—higher than any other sources including internet research, social media, rankings or word-of-mouth.[13]

> "DMOs need to expand their roles within cities or destinations, and position themselves as the stewards and managers of the city's brand—not only for tourism, but for talent attraction and investment as well. No other organization in a destination has the funding or expertise to do it, and by assuming that role, a DMO can expand its value proposition to the community it serves."
>
> – Chris Fair, president, Resonance Consultancy and author of 'America's Best Cities' report

CASE STUDY

PHOTO CREDIT: CINCINNATI

Cincinnati: Polishing the Queen City's Jewels

Just a few blocks from Cincinnati's city-center is the Over-the-Rhine neighborhood. Today, it is known for its breweries steeped in the neighborhood's German culture, its performance venues like the historic Music Hall that swans over Washington Park and neighborhood centers like Findlay Market.

Just 17 years ago, the picture was starkly different. In 2001, race riots rocked the city of Cincinnati. The aftermath informed a long, slow decline that put the city in crisis.

That was not to be the end of the city's story. What has followed has been nothing short of a total renaissance that has brought vibrancy, community, culture—and, yes, tourism—to a place that had been all but forgotten.

Cincinnati is home to nine Fortune 500 companies, including Kroger, Procter & Gamble (P&G), GE Aviation and Macy's. But without an attractive downtown where employees could live and work, the leaders of Cincinnati's business community worried about their talent pool and longevity in the area.

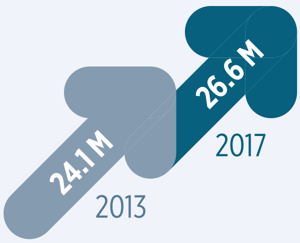
PHOTO CREDIT: CINCINNATI

In 2002, then-Mayor Charlie Luken paved the way for the establishment of a nonprofit corporation that had the capacity to deliver efficient, effective change. He recruited P&G's then-CEO, A.G. Lafley, as chairman, a position Lafley only accepted after getting assurances that the city had the political will to endure a long and difficult process. "This wasn't going to take a year or two, but a decade or more," Lafley shared with

CASE STUDY Cincinnati: Polishing the Queen City's Jewels

Politico Magazine. "And it was going to require all of the assets and resources of the city coming together, setting aside all their separate agendas, and agreeing to support a clear strategy and set of goals."[14]

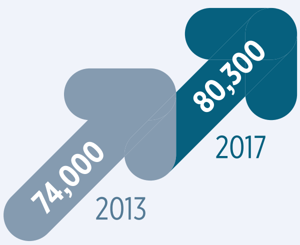
CINCINNATI VISITORS



Corporate leaders founded the Cincinnati City Center Development Corporation (3CDC), backed by an $80 million fund.[15] That funding, combined with federal support through New Market Tax Credits, spurred dramatic changes.

From overhauling Fountain Square, the city's center, to a block-by-block revitalization of Over-the-Rhine, Cincinnati started on a path that few could have predicted. Area natives have been lured back to become part of the city's new chapter. Chef Ryan Santos, who had gone to restaurants from Chicago to Copenhagen, told *Chicago Tribune*, "There wasn't anything to stick around for [10 years ago]. Now the changes are so significant, I wanted to be a part of this."[16]

CINCINNATI TOURISM JOBS



The significant changes have paid off. Cincinnati recently landed on *New York Times*' "52 Places to Go in 2018"[17] and Lonely Planet's "2018 Best in the U.S." lists.[18]

Attracting talent also attracts tourists. In just five years, the region went from hosting 24.1 million visitors to a record 26.6 million visitors in 2017. The visitor growth also resulted in job growth, as tourism jobs grew to 80,300 in 2017, up from 74,000 in 2013.[19]

Tourism is a welcome growth area for the economy. Tax revenues from tourism brought in $1.2 billion in 2017, offsetting the tax burden by $653 a year for every household in the Greater Cincinnati region.

Interestingly, 3CDC reports its total investment in the city since 2004 is $1.3 billion.[20] **The tax revenue from visitors nearly offsets that amount in a single year.**

The city is seizing its moment and planning for a future that includes tourism as a centerpiece. There is a planned $135 million expansion of its convention center,[21] new transatlantic service from WOW Air,[22] and the announcement that FC Cincinnati would become the 26th Major League Soccer (MLS) team.[23]

For all the investments in what sound like tourist attractions, the plan in Cincinnati was never about tourism. From its beginnings, the goal was to create a place that would be attractive to live and work so that the companies in the area would have a strong talent pool. But through smart coordination among the city's stakeholders, including destination marketers, the growth in visitors created an economic boon that helped offset development costs and outpaced expectations.

Destination Marketers are Economic Developers

KEY TAKEAWAY

Quality of life is increasingly important to relocation decisions. Destination marketing organizations are skilled storytellers that can empower and enliven efforts to entice businesses to headquarter or grow in an area.

Destination marketing organizations, state tourism offices and convention and visitors bureaus are charged with growing travel, but often do much more than promotion. They are marketers who tell the story of a community and what it has to offer, painting a picture of why a place is somewhere worth stopping by—or staying a while.

With a presently low national unemployment rate, employees have more leverage in deciding not only who to work for, but also *where* they want to live. Beyond the standard tax incentives, low crime rates and educational opportunities, economic development organizations are realizing they need to demonstrate quality of life through unique cultural, dining and recreational offerings.

Who better to tell that side of a community than destination marketing professionals?

Destination marketers no longer market only to tourists, but shape the area's image, making them not just promoters but managers of their destination. When done well, their work can develop economies and improve communities for visitors, current and prospective residents alike.

"Destination promotion serves a true catalyst for economic development. It builds awareness, creates familiarity and grows relationships in networks that are critical for the success and expansion of businesses in the region. The tourism economy not only generates taxes and creates jobs, but tourism promotion propels economic growth by sustaining the things we love and need—from the basic infrastructure of roads and buildings to great restaurants and shops, outdoor recreation and the arts. This directly impacts and improves the quality of life of local residents."

– Paige Alost, executive director, Athens County Convention and Visitors Bureau[24]

CASE STUDY

Marketing a Destination to Amazon

Amazon's announcement of a second headquarters ("HQ2") spurred action in cities across North America. With the promise of up to 50,000 jobs, with an average salary of $100,000, at one of the world's fastest-growing companies, economic developers, chambers of commerce, city councils and other agencies clamored to attract Amazon's HQ2 to their city.

One of Amazon's six decision drivers is finding a "community where employees will enjoy living with recreational and educational opportunities."[25] As suitor locations scrambled to woo the tech giant, destination marketing organizations highlighted how their value extends to attracting businesses, not just tourists.

Kansas City Gets in the Game

While not one of Amazon's top 20 candidates, Visit KC, Kansas City's economic development organization dedicated to tourism, provided marketing support to sell the city as part of their bid for Amazon's HQ2.

Partnering with the Kansas City Area Development Council (KCADC), Visit KC took the lead on providing consistent messaging and visuals to demonstrate what makes Kansas City unique.

Amazon aside, Visit KC has a successful track record highlighting the positive lifestyle Kansas City offers to visitors, residents and its potential workforce. Major corporations headquartered in the area—including H&R Block, Garmin International and Hallmark Cards—work with Visit KC to provide support for their recruitment efforts.


PHOTO CREDIT: VISIT KC

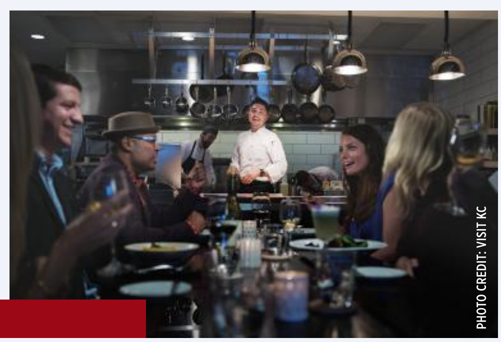


PHOTO CREDIT: VISIT KC

CASE STUDY | Marketing a Destination to Amazon

Philadelphia Makes a Bid

Both the Philadelphia Convention & Visitors Bureau (PHLCVB) and Visit Philadelphia shared resources and expertise to illustrate the city's attractiveness in the city's Amazon HQ2 bid.[26] **According to PHLCVB's Chief Administration Officer Angela Val, "Having marketing organizations involved infused soul into the process—helping tell the story and bring it to life."**

The city's DMOs contributed their marketing and social media support to bring the PHILADELPHIA DELIVERS website to life.[27] The efforts paid off as the city made it to Amazon's shortlist of candidates for HQ2. Originally created to sell Philadelphia to Amazon, the city is continuing to leverage the website and its content for future business recruitment efforts.

PHOTO CREDITS: PHLCVB

Visit Philadelphia contributed to the overall effort of HQ2, with specific emphasis on establishing Philadelphia as a place to live, work and play, by applying work in image building for Philadelphia through advertising and social media to those living in Seattle and working for Amazon.

– Meryl Levitz, president and CEO, VISIT PHILADELPHIA

"Participating in the Amazon bid process helped us uncover a new narrative for Philadelphia. As the primary sales and marketing arm for the PA Convention Center and the organization charged with positioning Philadelphia globally, we are always looking for creative ways to tell Philadelphia's story. The Amazon bid process enabled us to do that while also connecting us to new partners that can assist us in positioning Philadelphia as a premier U.S. destination."

– Julie Coker Graham, president and CEO, PHLCVB[28]

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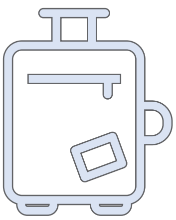
Destinations Create a Sense of Place and Pride for Residents

KEY TAKEAWAY

The residents of a community are at heart the decision-makers––their opinions matter. Residents who take pride in their community are valuable advocates for its storytelling, serving as a trusted resource to friends and family and other potential visitors.



54% of lesiure travel is to visit friends and relatives

63% of first-hand visits to friends and relatives influenced impressions of a destination for college graduates

Residents can be champions of a destination or detractors if they do not see the value in increasing visitor demand. **As tourism demand continues to increase, destination marketing organizations have the added responsibility of engaging with and creating advocates with local residents as well.**

More than half (54%) of leisure travel is to visit friends and family.[29] When residents take pride in where they live, they can promote their community and what makes it unique to their loved ones. Friends and relatives are often a key resource when planning a trip. Not only do family and friends influence travel planning decisions, close to two-thirds (63%) of recent college graduates indicated their impressions of a destination were formed as a result of first-hand visits to friends and relatives.[30] As the next generation chooses their careers and where they want to start the next phase of their lives, perceptions and image of a location are on their short list.

> "Research shows that **residents of a destination are critical resources for those planning a trip** and play an even greater role in creating a truly authentic experience throughout the visitor's journey. The interactions our residents have with travelers **significantly help to change the perception of Cleveland and create unforgettable experiences** that contribute to visitors' decisions to come back."
>
> – David Gilbert, president and CEO, Destination Cleveland

CASE STUDY

Three Ways to Build Pride

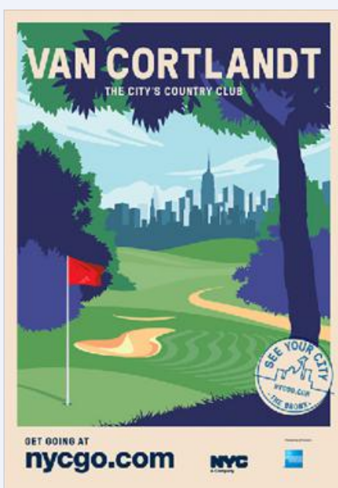
NYC & Company Markets the Stay-cation

NYC & Company leveraged New York City residents for its long-running *See Your City* campaign. At the campaign's launch, Fred Dixon, president and CEO of NYC & Company, said,

> "We want to give New Yorkers a new perspective on the five boroughs. Start thinking of the more than 250 New York City neighborhoods as 250 opportunities to travel."[32]

Nearly four years since the launch, *See Your City* has curated content from locals that is available to visitors who want to live like a local during their visit, and created appreciation for the travel industry—even if the idea of traveling only requires a ride on the subway.

As storytellers focused on promotion that will attract new and diverse visitors—and keep them coming back to experience more—destination marketing organizations can find new ways to help residents be proud of where they live.



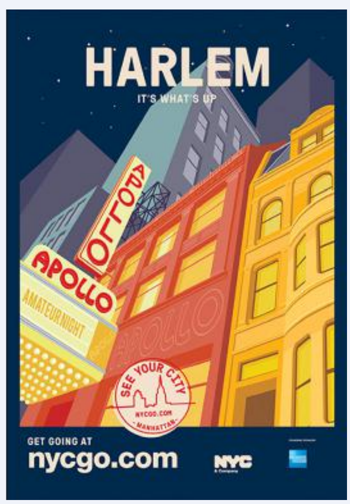


PHOTO CREDITS: NYC & COMPANY

CASE STUDY Three Ways to Build Pride

New Orleans & Company Captures the Spirit of the City

As New Orleans' largest employer, tourism generates billions of dollars in tax revenues for the local economy. **The refreshed tourism campaign from New Orleans & Company is raising awareness among city residents that while visitors may come and go, their dollars stay—and ripple through the community** to fund city services, police, schools, salaries, and ultimately, improve the quality of life for every New Orleanais.

New Orleans & Company will focus on ensuring that tourism benefits all residents as it continues to drive business to tourism stakeholders and provide a world-class destination for visitors. By connecting employment seekers to career opportunities and other workforce initiatives, New Orleans & Company is focused on new ways to support its residents by providing training, support and pathways forward.

"We believe that our culture is our greatest strength and the people of New Orleans create that culture. As New Orleans & Company, we are committed to ensuring that our industry benefits all residents of our city and nourishes and sustains the culture that attracts millions of visitors each year and improves the quality of life for all of us who call New Orleans home."

– Stephen Perry, president and CEO, New Orleans & Company[33]

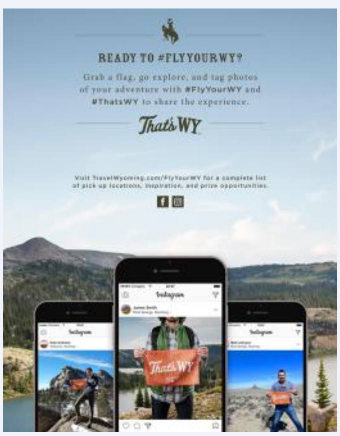
PHOTO CREDITS: NEW ORLEANS & COMPANY

CASE STUDY | Three Ways to Build Pride

Wyoming Office of Tourism Promotes WY Pride

Developed to diversify visitation across the state, the Fly Your WY program encourages visitors to see more of the state than the most popular Wyoming highlights by inspiring residents to promote travel in their local communities. **Designed to be shared in travel photos and through social media, 500 bright orange 'That's WY' flags were distributed to the state's 23 counties on March 7, 2018.** The day was coined 3.07 Day after the only area code in the state. Residents and local businesses celebrated their state pride and flooded social media with photos and videos showing off the Cowboy State with language that focused on 307, as well as the #FlyYourWY campaign.

Leading up to the summer travel season, the Wyoming Office of Tourism partnered with the Wyoming Division of State Parks and Historic Sites to distribute 'That's WY' flags at 20 state parks and historic sites throughout the state.



Wyoming's 'Fly Your WY' campaign will run through the summer of 2018. There have already been nearly 9,000 page views on the campaign website and over 700 page views from industry partners seeking additional details on how to get involved since the launch earlier this spring. On Instagram, there are more than 1,000 posts using the #FlyYourWY hashtag.

> "Wyoming is home to some of the most beautiful places in the country and the #FlyYourWY promotion encourages folks to show off all that is wonderful about Wyoming, from our iconic attractions to our small-town gems."
>
> – Kristin Dialessi, brand integration senior manager, Wyoming Office of Tourism[34]

PHOTO CREDITS: WYOMING OFFICE OF TOURISM

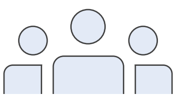
Destination Marketers are Small Business Champions

KEY TAKEAWAY

Small businesses make a destination unique, vibrant and more attractive to visitors. Not only is travel a significant part of the small business community, travel promotion can stimulate small business growth by generating visitor demand.

Small business is critical to the U.S. economy. According to the Small Business Administration, companies that employ under 500 workers account for 99.7 percent of firms with paid employees and contribute to nearly half (48%) of the total private-sector workforce.[35] **In addition, small businesses are the primary force for job creation. From 1992 to 2016, small businesses generated 62 percent of all new jobs in the U.S.[36]**

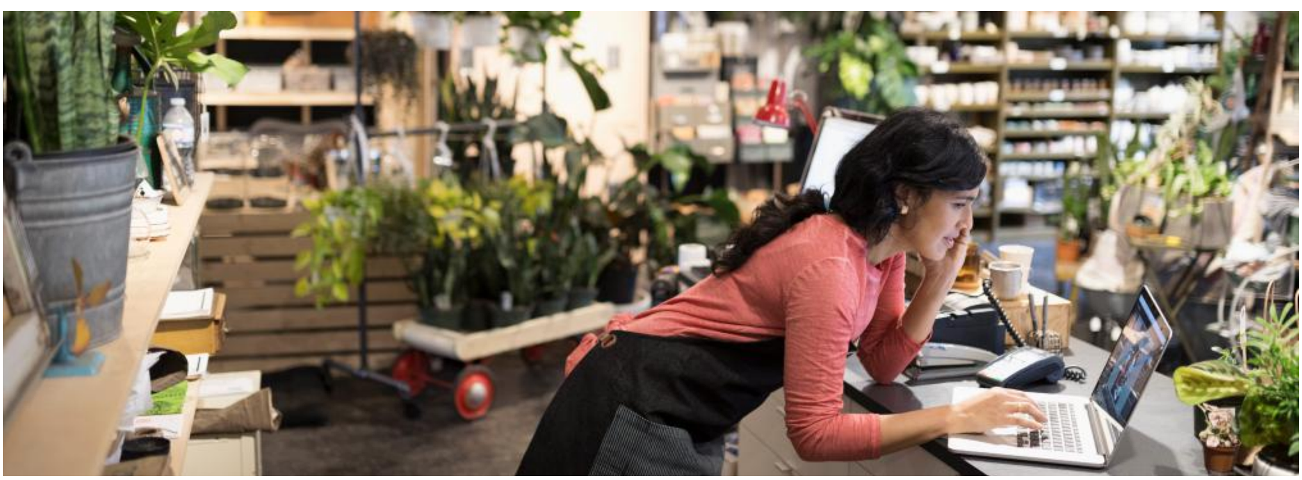
The top small-business employer in the United States is the travel-dependent leisure and hospitality sector.



Small businesses in leisure and hospitality employ
8.8 million workers
which account for 15.4 percent of private-sector small business employment in the country

While small businesses account for 48 percent of the overall private-sector workforce, they account for 61 percent of workers in leisure and hospitality.[37] Small businesses in leisure and hospitality employ 8.8 million workers, which account for 15 percent of private-sector small-business employment in the country—more than any other industry.[38]

This extends across America: leisure and hospitality is the top small-business employer in 23 states, and second in the remaining 27 states.



CASE STUDY

Virginia is for Small Business

In Virginia, half of the state's private workforce is employed by a small business. **Among the 20,000 leisure and hospitality establishments, two-thirds are businesses with fewer than 20 employees.**

The Hardywood Park Craft Brewery Effect

Nestled in an industrial neighborhood of Richmond, the Hardywood Park Craft Brewery has played a pivotal role in the boom of craft beer in Virginia. Founded in 2011 with three employees, Hardywood now employs 80 people. The brewery recently expanded into Charlottesville, VA and is investing in a new $28 million brewing facility and beer campus that will bring **60 new jobs to rural Goochland, VA**.[39]

Their original location receives 150,000 patrons annually and they expect to hit 250,000 in their new facility. The brewery estimates that 20 percent of visitors are from out of state—boosting the local economy with new travel spending, jobs and tax revenues.[40] The now 200+ breweries in Virginia have an estimated $9 billion economic impact for the Commonwealth.[41]

Hardywood Park Craft Brewery estimates that **20%** of **visitors are from out of state**—boosting the local economy with new travel spending, jobs and tax revenues.

Luray Caverns Lures New Visitors

Page County, home to Luray, benefited from $67 million in visitor spending and nearly $6 million in state and local tax revenues in 2016.[42]

Discovered in the Shenandoah Valley, more than 100 years ago, Luray Caverns are the largest caverns in the eastern United States. The first illumination for visitors was held in 1878 with just two employees. Luray Caverns has been open every day since and now employs 250 full-time and seasonal employees. In 2017, more than 500,000 visitors experienced Luray Caverns, and it is now designated a National Natural Landmark and the fourth most visited attraction in Virginia.

Virginia Tourism Corporation supports the creation of new tourism businesses, entrepreneurs and job creation, finding unique ways to market small businesses as an integral part of a visitor experience. **The organization advocates on behalf of small businesses on Capitol Hill, citing the economic opportunity for small businesses in the travel and tourism industry.**

Destination Marketers Build Bridges to Rural Communities

KEY TAKEAWAY

Destination marketing organizations are champions of rural regions, shining a spotlight on places that may be otherwise overlooked by visitors and invigorating economies of underserved areas.

Many state tourism organizations utilize marketing funds to assist in the promotion and development of rural communities that may not otherwise have stable revenue sources or ample employment opportunities otherwise. **Rural communities can benefit immediately from an increase in travel and tourism, which capitalizes on existing infrastructure, resources and people rather than new investment.** Even local businesses not directly related to tourism such as gas stations, grocery stores and other retail establishments can see immediate results to their bottom line with increased visitation and spending.

Investing in rural tourism development can also help alleviate areas concerned with "overtourism" by providing alternative travel experiences and dispersing visitors across the state.

Destination development programs are increasingly being implemented to develop and promote attractive, unique tourism assets in lesser known, more rural areas.

CASE STUDY

PHOTO CREDITS: UTAH OFFICE OF TOURISM

Utah Invests in "Rourism"

The overall Utah economy is roaring. Real GDP growth was up nearly 18 percent over the last five years, compared to 10.5 percent nationally.[43] Utah is home to the second highest share of federally owned land in the U.S. with two-thirds of land in Utah publicly-owned.[44] After the oil and gas extraction boom dissipated, many of these rural economies did not have economic alternatives, and while the large metropolitan cities have been booming, there is a "silent recession" in more rural areas of the state.

Tourism is particularly important to Utah's less populated counties where public land and outdoor recreation opportunities are plentiful.[45] **In rural counties, 12 percent of private sector jobs are directly supported by tourism**, compared to five percent in urban areas of the state.[46] **Local tourism-related sales tax revenue made up more than 75 percent of total local sales tax revenue in four rural Utah counties.**[47]

In rural counties, **12%** of **private sector jobs** are directly supported by tourism.

Local tourism-related sales tax revenue made up more than **75%** of total local sales tax revenue in four rural Utah counties.

The Utah Office of Tourism supports rural areas of the state through their "Utah Rourism" initiative. With a mission to aid rural areas in economic development efforts, improve the visitor experience, enhance recreation opportunities, and increase support services, capacity and extend busy seasons, "Utah Rourism" has stimulated many rural communities throughout the state.

Originally starting with four pilot communities, the state tourism office provided $75,000 in matching funds to assist with destination development. In 2017, nearly $2.5 million in tourism development and marketing funds were awarded to rural counties to assist with destination development, branding and promotion, training and enhancing recreation and support services to provide an improved visitor experience.

The state tourism office is now working with nearly 20 rural communities. The program's success has caught the eye of Governor Gary Herbert, prompting him to focus on aggressive job growth in this region.[48]

> "Outdoor recreation is indispensable in increasing economic opportunity in more rural areas of the state. We have set a statewide goal of creating 25,000 jobs in the 25 counties off the Wasatch Front by 2020—and a growing outdoor recreation economy will play a key part in reaching that goal.
>
> - Utah Governor Gary Herbert[49]

CASE STUDY

Utah Invests in "Rourism"

"Utah Rourism" investments have improved the visitor experience in a variety of communities across the state. Logan, UT is adding wayfinding signage and provided matching funds for downtown businesses to improve sidewalks, planters and other elements to create a more positive first impression for visitors. As a basecamp for the iconic Zion, Bryce and Grand Canyons, Kanab, UT is focusing on promoting the community as a world-class hiking destination. Investments to improve the visitor experience include trail development and enhanced signage to local trails, as well as private sector outreach to extend the local businesses hours and offerings.

Emery County launched a marketing campaign to increase awareness about the San Rafael Swell. **Tourists are discovering the area, leading to business growth and increased revenue infused into the local economy.** The county has seen an increase in business opportunities ranging from locally managed Airbnb properties to new restaurants and service industry businesses.[50] For local resident Brett White, who opened Castle Valley Small Engine, it was simply a matter of seeing a need and doing something about it. There was not a place where off-road riders could get their four-wheelers repaired, so he opened one. "People come out to explore the trails, and they usually bring their own machines. In the past if something broke down, the nearest shop was nearly 45 miles away."[51]

Emery County's goal is to not only raise awareness amongst tourists, but also to highlight business opportunities in the surrounding cities and towns.[52] Emery County is promoting the affordability, quality of life and economic development programming that is attractive to entrepreneurs and business investors. The county understands that the key to prosperity is diversification of businesses, services and amenities and is actively working to attract each.[53]

PHOTO CREDITS: UTAH OFFICE OF TOURISM

CASE STUDY

PHOTO CREDITS: COLORADO HISTORIC HOT SPRINGS LOOP

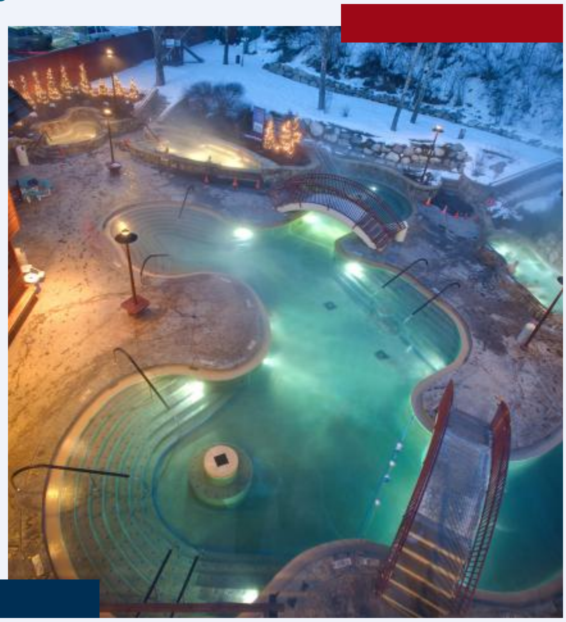
CRAFTing Opportunities for Rural Colorado

Founded in 2018, the Colorado Rural Academy for Tourism (CRAFT) provides support and education for rural communities on how to build tourism into an economic development strategy. The Colorado Tourism Office then leverages their marketing expertise and partnerships to promote new or enhanced traveler experiences in the areas.

The CRAFT program recently worked with two rural communities to develop their tourism strategy. In Trinidad, CO, CRAFT Studio 101 and the Colorado Tourism Office brought together a diverse group of stakeholders to learn about key tourism topics and trends and the potential of tourism as a local economic driver in their community. Now Trinidad stakeholders speak with a unified voice and from a shared vision in regard to their current tourism inventory and potential future tourism productions. Together, they developed a new marketing campaign to promote the area.

Coupled with the CRAFT program, the Colorado Tourism Office Marketing Matching Grant Program provides funding to nonprofit organizations to promote less visited regions across the state as tourism destinations. **In 2017, the state invested $600,000 through marketing matching grant programs.** Travel regions throughout the state are eligible for these grant dollars, as well as statewide associations, organizations and other nonprofit entities that engage in promoting travel throughout Colorado.

A recipient of the marketing matching grant award, the Pagosa Springs Town Tourism Committee utilized $25,000 in matching funds to develop the widely successful Colorado Historic Hot Springs Loop. Through a partnership with five resort destinations, the campaign encouraged travelers to explore attractions along a scenic 720-mile route featuring 19 thermal mineral water attractions.



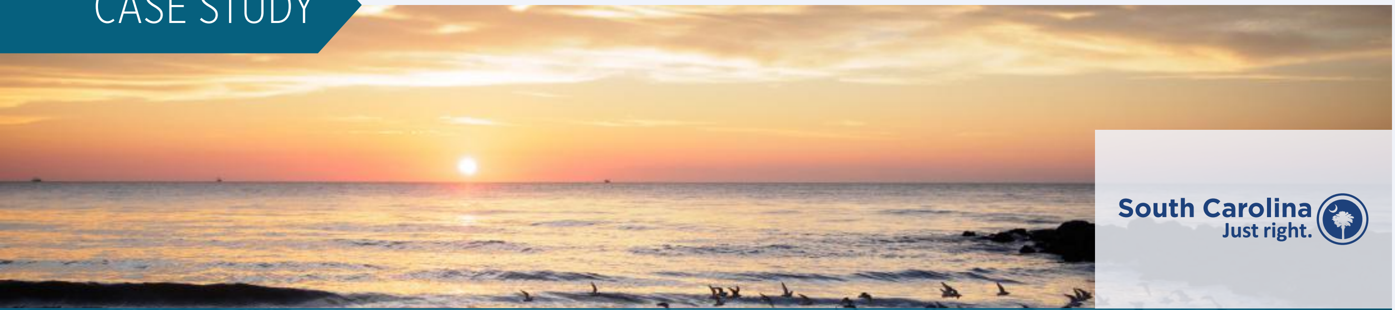
CASE STUDY CRAFTing Opportunities for Rural Colorado

The state tourism office pitched the appealing hot spring visitor experience to top news outlets across the U.S. and generated an incredible amount of earned media. **In just two years, the loop garnered more than 150 news articles and editorials in top publications** from *USA Today, The Washington Post, National Geographic Traveler* and *Sunset Magazine*.

The campaign resulted in a significant increase in awareness of the hot springs, increased visitation, extended length of stays and record tax revenues for the five resort towns in western Colorado.[54]

PHOTO CREDITS: COLORADO HISTORIC HOT SPRINGS LOOP

CASE STUDY



Discovering Undiscovered South Carolina

The Undiscovered South Carolina grant program is designed to assist communities develop publicly owned tourism products and attractions to encourage visitation to lesser known areas of South Carolina and stimulate their economies.[55] As a one-to-one matching program between the state and local government, the program requires financial support from the local government. **Travelers to South Carolina spent $21.2 billion in 2016—up 5 percent from the prior year. This spending supports one in every 10 jobs in the state and generated $1.6 billion in state and local taxes.** The state tourism director, Duane Parrish, credits the Undiscovered South Carolina marketing initiative for continuing to grow the travel industry across the state.

Since 2014, the South Carolina Office of Tourism invested $1.6 million in nine projects across the state, supporting local jobs and generating tax revenues in rural communities.

Rich with history but beginning to deteriorate, the Historic Garvin-Garvey House in Bluffton, SC is the oldest home built by a freed slave on the May River. An investment of $200,000 from the Undiscovered South Carolina grant program allowed the major rehabilitation project to move forward much more quickly than initially planned. In less than one year, the Garvin-Garvey House was preserved and will stand as a lasting legacy in the community.[56]

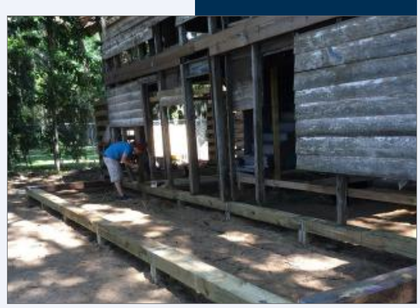


PHOTO CREDITS: SOUTH CAROLINA OFFICE OF TOURISM

Destinations are Crisis Managers

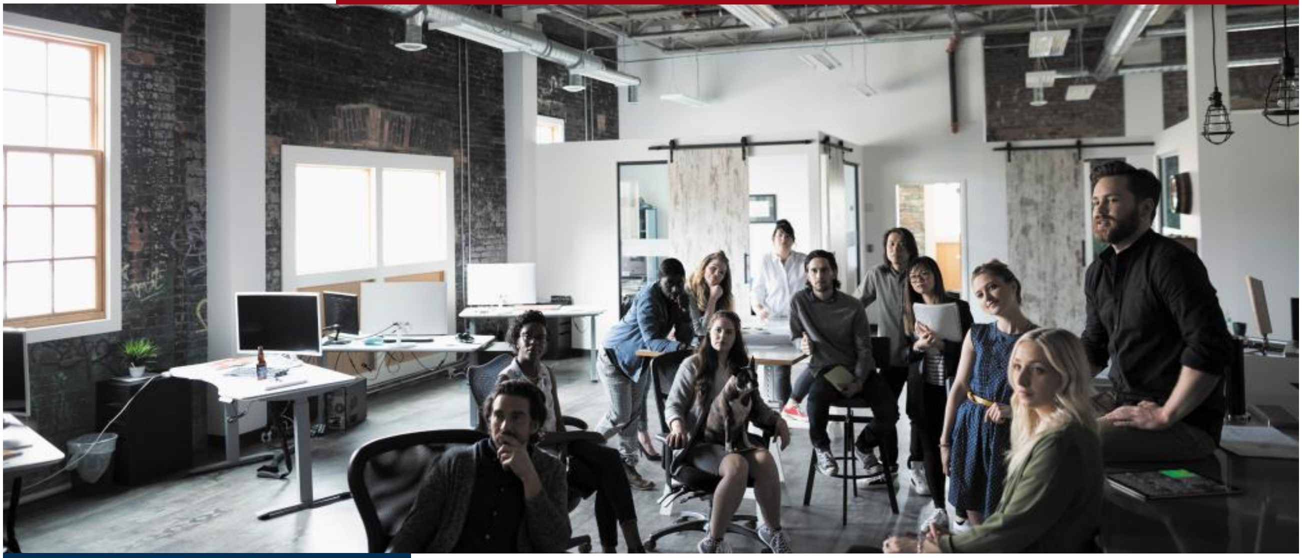
KEY TAKEAWAY

Destination marketers are unexpected—but critical—resources during a crisis situation. During a crisis, DMOs, CVBs or tourism offices often serve as a source of credible information for both visitors and residents. During recovery, destination marketers are also uniquely positioned to get the word out that an area is open for business.

Destination marketers are taking on new responsibilities as crisis managers, serving as sources of information and helping with the rebuilding process of a community. With growing social media presence and engagement from both visitors and residents, destinations' communication channels are often utilized to share timely and official information from city leaders. Routinely, these channels provide travel advisory pages and updates on road and airport closures, emergency information and safety shelters.

Destination marketers are essential to recovery after a crisis.

Serving as a trusted resource for the public to learn when an area is open for business again, destination marketers are uniquely positioned to revive the economy by promoting the destination and getting visitors to return faster—the visitors that will generate tax revenues necessary for rebuilding.



CASE STUDY

PHOTO CREDIT: TEXAS TOURISM

Destinations Weather Hurricane Recovery

Texas Tourism and VISIT FLORIDA Play a Part in Hurricane Preparation and Recovery

As their state's official tourism marketing entity, Texas Tourism and VISIT FLORIDA play a vital role in each state's crisis response and recovery efforts. From ensuring visitors have the information they need to make informed travel planning decisions that will help them keep safe, to providing resources to tourism industry businesses looking for leadership and assistance, to serving as a conduit for information between state officials and local businesses, state tourism offices have proven to be pivotal crisis managers when emergencies arise.

In response to the landfall of Hurricane Irma and Harvey in the late-summer of 2017, the state tourism offices in Florida and Texas activated Travel advisory pages on consumer-facing websites. The tourism offices effectively provided weather alerts and official resources to assist visitors with making the most informed travel planning decisions possible. Throughout the hurricanes, the web pages were regularly updated to provide the latest official information on evacuation notices, curfews, traffic updates, power outages, gas availability and other timely resources travelers needed.

Quickly activating existing partnerships with Expedia and Airbnb, VISIT FLORIDA utilized multiple channels to share real-time information on accommodations available for displaced visitors and residents.

CASE STUDY — Destinations Weather Hurricane Recovery

VISIT FLORIDA also transitioned four of its Florida Welcome Centers, located at major access points, into emergency information centers, offering the latest intelligence on evacuation notices, accommodations, gas availability and road closures, as well as providing a much-needed respite for travelers.

When Hurricane Harvey, the second most costly hurricane to hit the U.S. mainland in over 100 years hit, **Texas Tourism coordinated a response with other state agencies, including the Texas Parks and Wildlife Department and the Texas Department of Transportation.** Texas Tourism was a reliable source of information educating both visitors and residents on the impact of the hurricane.

With targeted investments in additional advertising, promotional videos, media tours and familiarization trips, the state tourism offices played an active and important role in post-hurricane recovery to the hardest hit areas. The state tourism offices also worked to inform visitors that the vast majority of Texas and Florida destinations remained open for business.

Proactive media pitching and social media content highlighted the areas impacted by the storms and documented recovery progress, ultimately communicating when they were ready for tourists once again.

> As a result of the support and investments in ongoing promotional campaigns from the state tourism office, many of the Texas Gulf Coast destinations enjoyed a record-breaking spring break season in 2018.

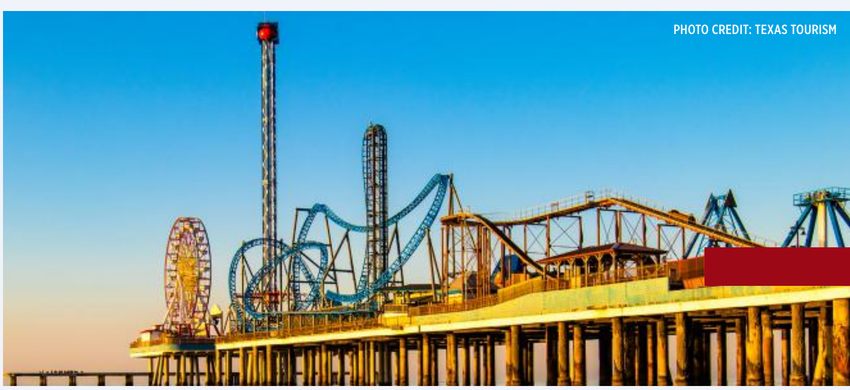


PHOTO CREDIT: TEXAS TOURISM

CASE STUDY

PHOTO CREDIT: OUTER BANKS VISITORS BUREAU

Hatteras is On: Outer Banks Power Outage

In July 2017, an eight-day power outage caused by construction drilling during the height of summer tourist season affected two islands of the Outer Banks.[57] A state of emergency and mandatory evacuation was ordered for 50,000 residents and visitors on Hatteras and Ocracoke Islands in North Carolina.[58]

While national and regional media reported the incident as the "Outer Banks Power Outage," indicating the entire vacation destination was inaccessible, the reality was only two islands, comprising 25 percent of the region, were part of the emergency.[59] The Outer Banks Visitors Bureau quickly mobilized to correct the story and inform the public that the outage was a localized event and the majority of the destination was unaffected.

The Outer Banks Visitors Bureau collaborated closely with local emergency management agencies and electricity companies to provide regular updates to the community throughout the event.[60]

Production of a promotional video, **"Hatteras is On,"** was **viewed more than 600,000 times** and **seen by nearly 7,000 Instagram users.**[61]

Capitalizing on its reach, access to key businesses and creative talent, the visitors bureau took the lead announcing when Hatteras and Ocracoke Islands would reopen. Production of a promotional video, "Hatteras is On," was instrumental in welcoming visitors back and supporting the tourism industry in the weeks following the outage. Viewed more than 600,000 times and seen by nearly 7,000 Instagram users, the video was one of the visitors bureau's most popular posts ever.[61] **While August 2017 revenues were down compared to previous years, business quickly bounced back and Hatteras and Ocracoke Islands experienced large gains between September and December resulting in positive numbers for the full calendar year.[62]**

By effectively coordinating messaging with key agencies, maintaining consistency and providing regular updates, the Outer Banks Visitors Bureau played a key role informing the public and positively influencing perceptions to minimize the negative impact of the Outer Banks power outage.

PHOTO CREDIT: OUTER BANKS VISITORS BUREAU

The Importance of Investing in Promotion

Destination marketers are storytellers, economic developers, rural promoters, crisis managers and—perhaps most critically as it is part of every hat they wear—brand creators.

A strong and lasting brand defines a destination and sets it up for success. Taking this role away from the destination marketer allows others to tell the story of a place—not necessarily for the better.

Destinations' tourism marketing budgets face cuts or elimination far too regularly due to politics of expedience and convenience. But **before putting that funding on the chopping block, legislators would be wise to take a page from corporate America about the power of a strong brand.**

The Importance of Promotion and the Value of Brand Affinity

The volume of messages consumers are hit with has risen dramatically in recent years. **A strong brand allows a company to break through the noise and deliver relevant content that translates to sales.** The results have driven advertising spend upward year after year, with eMarketer's 2018 advertising forecast predicting that $221 billion will be spent on advertising in the United States alone.[63] For comparison, Comcast, the top corporate advertiser in 2016, spent $5.6 billion, where the median state marketing budget for travel and tourism was just $6.3 million last year.

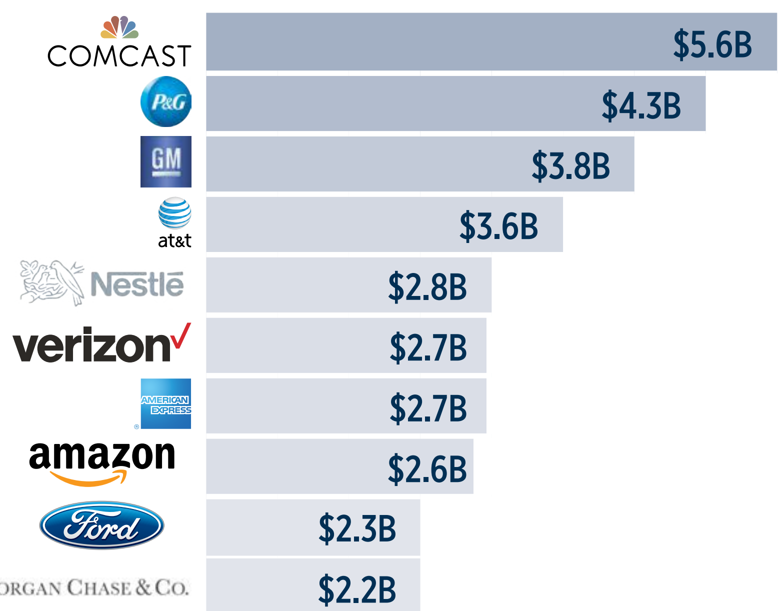
The intangible nature of branding can be difficult to understand. **At some point or another, most brands have faced questions about why marketing dollars are necessary. There is always a naysayer who feels the company or product is well-known enough to stand without marketing support.** Budget struggles and competing priorities force difficult decisions, and the dollars dedicated to promotion can be seen as an easy solution. **But this temporary financial salve leads to falling behind the competition, making it difficult—if not impossible—to recover.**

Relying on customers' awareness of a brand is insufficient. There is a sharp difference between brand awareness and brand affinity.

Brand affinity is where the real value is—the feeling and meaning created around a company or product will define its success or failure.

Practically every American is aware of brands like Nike, Apple, and Coca-Cola, yet these companies continue to invest heavily in shaping their brand's perception and cultivating customer affinity because they see a direct return. **Travel destinations, like corporate brands, need to engender brand affinity to remain competitive and to continue growing.**

Top 10 Corporate Advertisers in 2016



Source: AdAge Datacenter

CASE STUDY

PHOTO CREDIT: P&G

Creating a United Brand: P&G's "Proud Sponsor of Mom"

OUTSIDER PERSPECTIVE

P&G's products are not unlike a destination's features and attractions. Independently, they have value, but when coordinated together, the individual parts are elevated through the feeling and purpose created by the unified brand.

For the 2010 Olympics, P&G debuted its now long-running "Thank You, Mom" campaign. Designed to pay tribute to the moms behind Olympic athletes, **the campaign coordinated P&G's various brands in a way it typically had not.** Consumers were long familiar with Tide, Pampers, Bounty, Pantene, Gillette* and more, but for this campaign, while the product lines were featured, the close of each ad carried the P&G brand, positing it as the "proud sponsor of moms."

"We needed a big idea," Marc Pritchard, P&G's Global Brand Officer, told the audience at the Association of National Advertisers (ANA) Masters of Marketing Conference. "An idea that would integrate the purpose of P&G, which is to make life better through our products with the purpose of the Olympics, which is to make life better through sports."[64]

The resulting campaign connected emotionally with moms—who saw every Olympic athlete as someone's child—and in the background, they saw the brands that helped these moms as they made sacrifices in support of their children's dreams.

The campaign fostered awareness, but more importantly, affinity for P&G. In 2012, P&G elevated its Olympics sponsorship, becoming a "Worldwide Olympic Partner." According to the ANA, the 2012 iteration of "Thank You, Mom" was the most successful campaign in the company's 175-year history.[65] **Reuters reported that the 2012 Olympic Games gave P&G a $500 million sales boost.[66] Favorability of the brand increased by 13 percent and trust by 11 percent.** Recall of the ads was 38 percent higher than other Olympic sponsors. AdWeek's Tim Nudd called P&G "the Usain Bolt of 2012 Olympic Sponsors."[67]

PHOTO CREDIT: P&G

P&G has continued its "Thank You, Mom" campaign over the course of every Olympics since 2010. The latest iteration for the 2018 PyeongChang games tackled bias, featuring a Muslim speed skater and a female hockey player while asking consumers to "imagine if the world could see what a mom does." The Olympics marketing "has enormous impact, because it creates conversation," said Pritchard. "People like to talk about it, and it endears our brand to consumers because they see that we talk about things they care about."[68]

* Tide, Pampers, Bounty, Pantene, Gillette and P&G The Proud Sponsor of Moms are trademarks of The Procter & Gamble Company, its subsidiaries or affiliates.

CASE STUDY

PHOTO CREDIT: DOUBLETREE

A Hotel Perspective: The DoubleTree Cookie Community

OUTSIDER PERSPECTIVE

In today's environment, brand management is a minute-to-minute challenge for corporations and destinations. Building two-way relationships with a social media community can drive loyalty and advocacy in a way that traditional one-way marketing could not achieve alone.


PHOTO CREDIT: DOUBLETREE

Brand affinity is changing. **Marketing has changed from a monologue to customers into a dialogue with customers**. Building and protecting a brand in 2018 does not come with the luxury of total message control. Social media and review websites give consumers the power to influence brands. **Protecting a brand is not about trying to control these expressions, but about creating a strong community of storytellers that enhance the brand**.

Since 1986, Hilton's DoubleTree Hotels treat every guest to a warm cookie upon arrival.[69] Why? As the brown paper bag the cookie comes in explains, "Cookies are warm, personal and inviting, much like our hotels and the staff here that serves you."

This simple expression of hospitality has created a devoted fan base. Their social footprint is filled with cookie conversation on Facebook, Twitter, and Instagram. There are innumerable food bloggers putting forward their attempts at the DoubleTree cookie recipe, which remains a secret. Reviews of DoubleTree hotels are filled with comments about the warm cookies. Serious Eats' Erin Zimmer wrote of her experience, "DoubleTree seemed like just another hotel chain to me, until I stayed there—and was handed a warm cookie with my room card. Ah, that's right, this is the cookie hotel!"[70]

The DoubleTree cookie is central to the hotel's brand, and the company has continued to build around it. In 2017, DoubleTree launched its latest marketing campaign, "Your Warm Cookie Awaits," aimed at inspiring others to make the world a more welcoming place.

"At DoubleTree by Hilton, we know that the spirit of hospitality doesn't disappear after check-out—and that small actions can have a big, positive impact on individuals, groups and the world," said Stuart Foster, vice president of global brand marketing for DoubleTree.[71] "Through the 'Your Warm Cookie Awaits' campaign, we hope to encourage more people to fill the earth with the light and warmth of hospitality—whether that's extending a warm DoubleTree cookie, volunteering for a local charity or simply sharing a smile with a stranger."

The "Your Warm Cookie Awaits" effort took a single brand element and made it about more than room nights—it established DoubleTree as part of the local community and the global community.

Destinations are Brands Worth Investment

KEY TAKEAWAY

Brand awareness alone does not guarantee returns. The investment in cultivating brand affinity creates an emotional bond to a destination that will differentiate it from the competition and deliver greater long-term value.

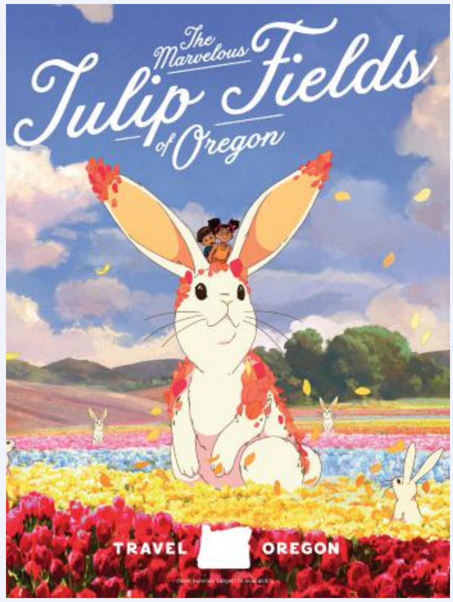
Travel destinations, like products and companies, are brands. They work to define themselves in a way that makes them attractive, relevant and competitive—and at a fraction of the investment of corporate brands. **In 2016, the top 25 corporate advertisers spent $61.5 billion marketing their brands.**[72] **By comparison, the 50 state tourism offices spent less than one percent as much—just $595 million in FY16-17 to market their destination brands.**

By investing in travel promotion, communities are investing in their own growth. Travel promotion generates awareness and delivers additional visitors. Increased investments in travel promotion results in additional visitors and increases in travel-generated taxes. **Just a five percent increase in state and local taxes generated by travel would fund a $1,200 wage increase for every public teacher across the country.**[73]

CASE STUDY

PHOTO CREDITS: TRAVEL OREGON

Travel Oregon is "Only Slightly Exaggerated"



With its spring 2018 campaign, "Only Slightly Exaggerated," Travel Oregon sought to build a brand that would take it beyond an itinerary.[74] With Crater Lake, Mt. Hood and the Willamette Valley all within Oregon's borders, the real imagery of the state is enough to motivate travelers. But Travel Oregon chose to do an animated campaign—the first of its kind for a destination—that builds the state's unique brand of magic. "Every travel campaign had one thing in common—they all looked the same, and even the most beautiful nature photography and sexy rugged outdoorsy people start to fall flat in ad after ad," Ansel Wallenfang, copywriter at Oregon's agency Weiden+Kennedy, said. "We wanted to create the sweet spot of sophistication and whimsy."[75]

With giant rabbits in fields of tulips and clouds that look like a pod of whales, the campaign conveys the feeling of an enchanted place—a feeling that cannot be captured on film. As the style guide explains, "It is a reminder that while the animation is fantastical, it really is only slightly exaggerated from the reality of Oregon."[76]

It is the feeling of magic that is the essence of Oregon's brand. It differentiates the state in a way that is meaningful for potential visitors and creates affinity that goes far beyond what awareness of "things to do" in the state.

Oregon has hiking, Pacific Ocean views and wine country—but so do Washington and California. "Only Slightly Exaggerated" made the state a standout on its own terms.

In its first 48 hours, the campaign video received 400,000 views on YouTube and more than one million on Facebook.[77] **To date, the video has been viewed more than 10 million times—seven million of which were on Facebook—and 85 percent of the views were organic. The video also succeeded in converting viewers to Travel Oregon's website, with visits to the site up 40 percent and page views up 120 percent over the previous year.[78]**

An International Perspective: America as a Brand

The United States is, itself, a brand. Like any destination, it is susceptible to fluctuations in visitors for reasons including but not limited to global economies, the strength of the dollar, shifting perceptions, natural disasters and other issues.

Actively promoting the U.S. to international visitors helps calm these fluctuations, protecting the 1.2 million Americans employed as a result of the $156 million spent by international visitors in 2017.

Brand USA is America's destination marketing organization, charged with promoting and enhancing the image of the U.S. to international visitors. Since its inception in 2010, this vital public-private partnership has delivered 5.4 million additional visitors to the United States.[79] These visitors spent nearly $18 billion, generating more than $38 billion in total economic impact over that time period.[80] Additionally, Brand USA's efforts to draw international visitors to the United States' many unique sites and destinations created an average of 51,000 new American jobs per year, **all without costing U.S. taxpayers a dime.[81]**

While the world is familiar with the United States, Brand USA's role is essential in driving visitation to, through and beyond the U.S. "gateways," promoting awareness of lesser-known destinations. Through innovative marketing and strong partnerships, Brand USA has the capacity to promote all 50 states, urban and rural areas, to demonstrate how vast, beautiful and exciting America is—and why international visitors should travel to our country.

To showcase some of the nation's most treasured assets—the U.S. National Parks, Brand USA invested in the production of *National Parks Adventure* film commemorating the 100th anniversary of the National Parks Service.

Through the spring of 2018, the film entertained seven million international viewers in 16 countries.[82] **In FY17 alone, the film is estimated to have generated visitor spending of $4 billion and an ROI of 26:1 on visitor spending.[83]**

But America's travel economy is at risk. During the past several years, as global travel has continued to increase, America's share has been on the decline. Brand USA is now more critical than ever, but its funding is on the line after 2020. Renewing Congress' commitment to Brand USA also renews its commitment to the jobs and economic impact travel delivers and puts America in a stronger position on the global stage.

Visit TheUSA .com

MacGillivray Freeman's NATIONAL PARKS ADVENTURE

What's at Stake When Promotion is Cut

KEY TAKEAWAY

Without effective promotion, states and cities cede the economic benefits to competing destinations and fall behind the competition. It is a mistake from which it takes many years to recover. And it is a mistake that is easily avoided when governments take a long view on their economic outlook.

At every level, there are preexisting perceptions about public funds being spent on tourism promotion. Those with a vested interest in combatting "corporate welfare" question any amount of spending from public funds and assume it is wasteful. Further, the very nature and assets of the industry can be easily viewed as particularly appealing. Too often legislatures have their own agenda and are inclined to invest tax revenues generated from travel and tourism into initiatives not related to travel.

Unfortunately, many legislators, media and third parties are less educated about the economic benefits and revenue impact of investing in tourism promotion.

Like any product, destinations and brands require investment to remain relevant, attractive and competitive. When Colorado and Washington state lost their funding, the impact was both immediate and long-lasting. Fortunately, their respective legislatures eventually realized they had made a significant mistake and missed out on years of opportunity and set out to correct it.

CASE STUDY

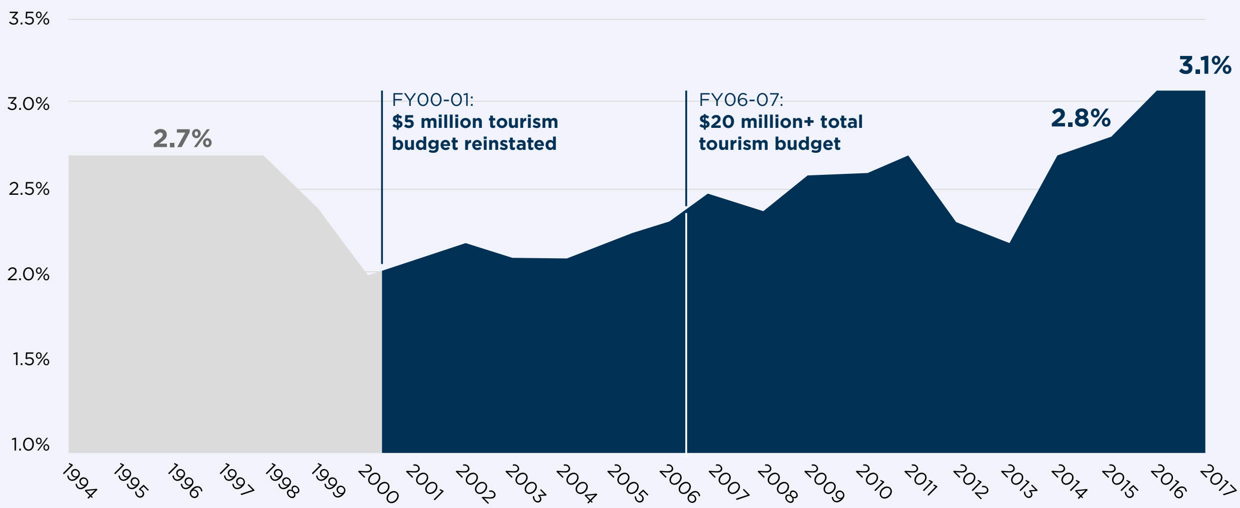
PHOTO CREDITS: COLORADO TOURISM OFFICE

Colorado Climbs Back

Colorado took 21 years to regain their share of overnight leisure travelers after having their budget zeroed out. In 1993, Colorado became the first state to eliminate its tourism promotion budget. As a result, Colorado's domestic market share plunged 30 percent within two years, representing a loss of over $1.4 billion in tourism revenue annually. Over time, the revenue loss increased to well over $2 billion annually.[84]

It took until 2000 for the industry to convince lawmakers to reinstate funding with a modest $5 million budget. Now at close to $19 million, funding for the state tourism office has increased more than 100 percent in the last 10 years.

Colorado's Share of U.S. Overnight Leisure Trips



Source: Longwoods International

The state moved back into the top-10 tourist-drawing states in the U.S. for the first time in more than 20 years in 2016.[85] Colorado's share of the national tourist market climbed to 3.1 percent, moving it up from the 13th-most-visited state in America to number nine.[86] The last time Colorado cracked the top 10 states for traveler market share was 1994—the year after the state decided to eliminate funding for tourism marketing.[87]

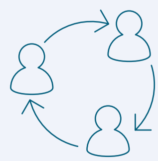
CASE STUDY Colorado Climbs Back

PHOTO CREDITS: COLORADO TOURISM OFFICE

Visitation increased 37 percent from the dip during the Great Recession in 2009 to 2016.[88] During that same time, travelers have grown nationally by just 17 percent. **In 2016 alone, the state attracted 82.4 million visitors who spent $19.7 billion and generated $1.2 billion in local and state tax revenue.[89] Directly supporting 165,000 jobs and the state's number two employer, travel is essential to the Colorado economy.[90]**

The Colorado Tourism Office and the Tourism Industry Association of Colorado have successfully continued to justify investments in tourism promotion and maintain their competitive advantage. **Not only does the state market the Colorado experience to visitors, but they are also involved in stimulating the economies of more rural areas of the state through their award-winning 'Come to Life' campaign.** Colorado is the only state with a dedicated fund supporting the promotion and development of agritourism.[91] The state recently dedicated another $500,000 in FY18-19 to continue investments in destination development.

In 2016 alone, Colorado attracted **82.4 million visitors** who spent **$19.7 billion** and generated **$1.2 billion in local and tax revenue.**



Directly supporting **165,000 jobs, travel is Colorado's #2 employer**

Tourism is big business, and businesses require investment in order to succeed. The return on investment on tourism spending has been proven many times over to pay dividends. It is a lesson Colorado learned the hard way, but a mistake the state will not make twice.

CASE STUDY

Washington Makes its Case

In 2011, the Washington state legislature shut down the state tourism office due to the economic recession.

While the Washington state tourism budget remained zeroed-out, the state was losing out to its competition. Neighboring state budgets in Oregon reached $21.5 million in 2016-17, increasing close to 100 percent since 2010-11, while Montana's budget increased 36 percent to $19 million in 2016-17.[92]

After seven years of grassroots campaigning and negotiations, the Washington Tourism Alliance (WTA), the nonprofit advocacy group established to sustain the state's official travel website and publish an annual visitor guide, successfully advocated to create a new industry-led tourism marketing program. With public and private funding, the legislature established the Washington Tourism Marketing Authority (WTMA) as the governing body and identified a nonprofit marketing organization to run the tourism program. Governor Jay Inslee signed the bill into law in March 2018.

WTA's success was the result of seven years of engagement with legislators, a sustained statewide advocacy campaign and refinement of the new tourism promotion legislation and funding model. Private and public stakeholders collaborated to create a network of allies. The legislation supports communities across the state by including a commitment to rural tourism and destination development. Through this process, rural stakeholders came to understand the importance of cities as gateways into the rest of the state.

The new state tourism marketing program will be funded from the state's general fund as well as private sector investment. Lodging facilities, car rentals and restaurant sales taxes will provide $1.5 million in funding in 2019. A 2:1 private-sector match is required to access the general fund monies.

By not investing, Washington missed out on more than just visitors. If the state had continued to invest and maintained their share of visitors, the tax revenues generated, jobs supported and household savings would have been significantly greater.

CASE STUDY

PHOTO CREDITS: VISIT BUFFALO NIAGARA

When Governors Get It: The Buffalo Billion

Draconian cuts to tourism budgets have proven time and again to be ineffective and harmful to a city or state's long-term economic health. There are, however, many local and state governments that see clearly the value of destination marketing and do not cut, but instead enhance their tourism budget. In those places, it is not about recovering what was lost, but growing what there is to be found.

The value of a legislature and governor that understand the value of travel, from visitors to economic development and beyond, cannot be understated. New York state understands and respects the power of travel—far beyond just Manhattan.

A town once known as a shipping and steel town or just a stopover on the way to Niagara Falls, Buffalo, NY is reinventing itself. Grain silos and public buildings with iconic architecture transformed into hotels, restaurants, breweries and art centers are making headlines and promoting Buffalo as an authentic city with unrivaled civic pride.

New York's Governor Cuomo committed $1 billion in investment to the Buffalo area economy in 2012 to generate new investment and economic activity. Tourism was included in the Governor's investment plan as a key sector to drive future growth.[93] **While the 'Buffalo Billion' kick-started the transformation of the Western New York economy, the local destination marketing organization—Visit Buffalo Niagara—capitalized on revitalization and renewed civic pride by promoting the redeveloped city to visitors, meeting planners, potential residents and businesses.**

Targeting the next generation of visitors, Visit Buffalo Niagara wanted to ensure millennials in the surrounding areas did not have the same negative stereotypes as previous generations. Under the umbrella of the Unexpected Buffalo marketing campaign, 'Find the Unexpected' targeted millennials in Toronto during the summer of 2017 aiming to generate intrigue, curiosity and awareness of Buffalo through a

CASE STUDY

When Governors Get It: The Buffalo Billion

variety of popular media channels. Experiences appealing to millennials were highlighted through social media and 15-second videos on YouTube, generating 266,000 views over the course of the campaign and attracting more than 7,000 visits to FindTheUnexpected.com. The Unexpected Buffalo campaign was a resounding success, according a Texas A&M University study revealed more than 105,000 visitor parties spent more than $1,000 on average totaling $108 million.[94] **For every dollar Visit Buffalo Niagara invested in outreach, they returned $84 in economic impact to the community.[95]**

Over the past five years, as a result of increased investments from the county, coupled with grant funding from New York State, Visit Buffalo Niagara has seen small, yet impactful, growth in their overall marketing budget to the tune of 7.3 percent. In addition to this increase in funding, further marketing efforts, valued at $1.3 million annually, have been made possible thanks to a recent collaboration between the City of Buffalo, Seneca Gaming Corporation and Visit Buffalo Niagara.

Visit Buffalo Niagara's media relations efforts achieved new records in 2017. As a result of hosting journalists and a variety of bloggers and influencers, more than 130 articles were placed in top publications such as *Thrillist, USA Today, Lonely Planet,* the *Globe and Mail* and the *Toronto Star*.[96] Most recently, **Buffalo was named to the 52 Places to Travel in 2018 by the *New York Times.***

Through its tourism promotion efforts, Visit Buffalo Niagara creates a cycle of economic benefits in which increased sales and bed tax revenues can be reinvested into the community.

The positive impact of travel touches every community and district in the United States. In an increasingly competitive space, communities need to work even harder to showcase their distinctive offerings, manage their image and create brand affinity. Destination marketers are in a unique role to lead the collaboration with other key organizations, engage residents, stimulate small business and even assist in the recruitment of skilled workforce and businesses.

With the support of policymakers and local officials, and ongoing investment in tourism promotion, destination marketing organizations are able to deliver essential economic benefits in the form of tax revenues and improve communities. Investing in travel promotion is a long-term investment in economic development. A strong destination brand is essential to stand out in a crowded, competitive and diverse marketplace.

CONCLUSION

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