

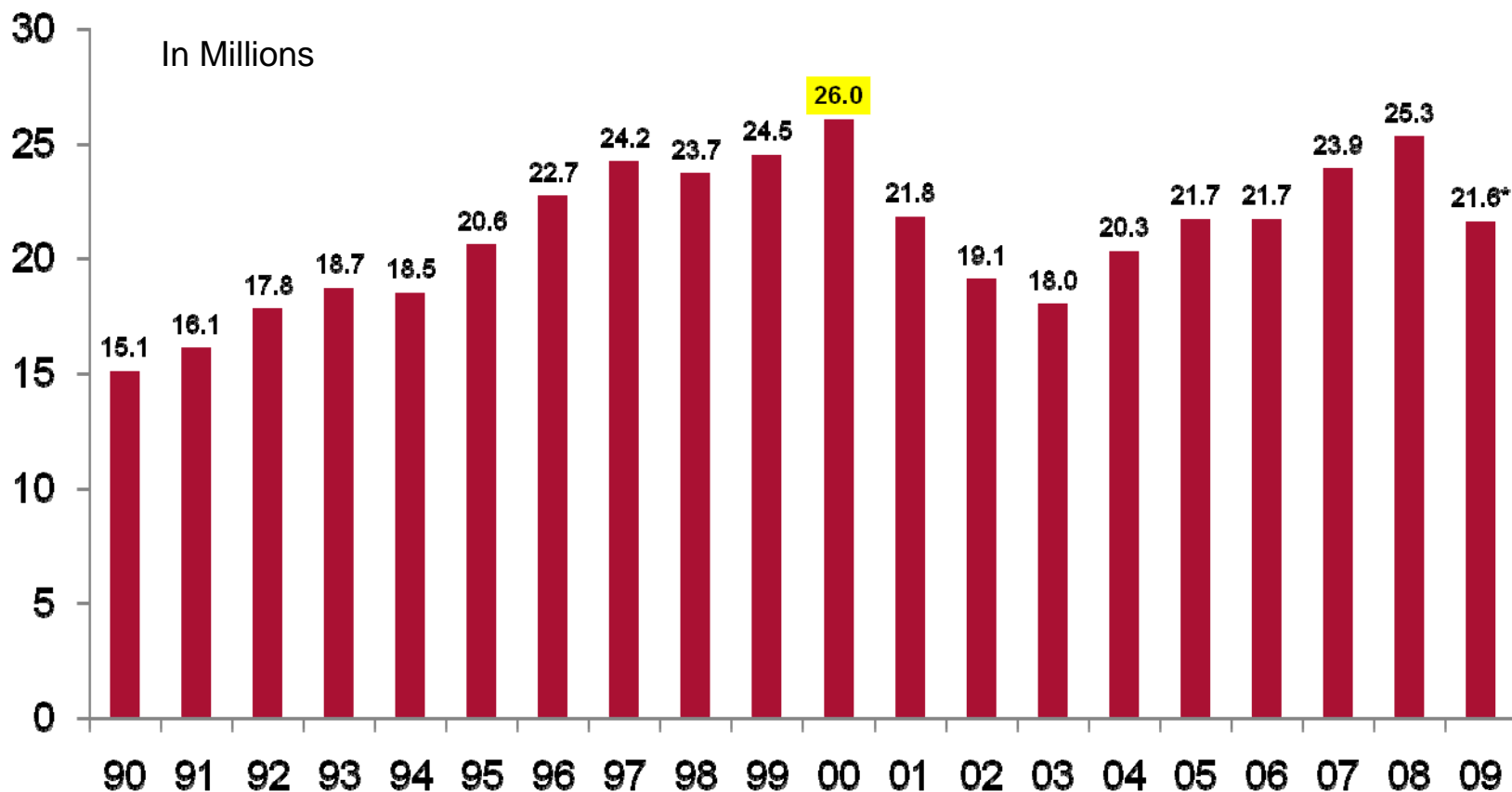


United States Travel Promotion Past, Present, Future



U.S. TRAVEL
ASSOCIATION

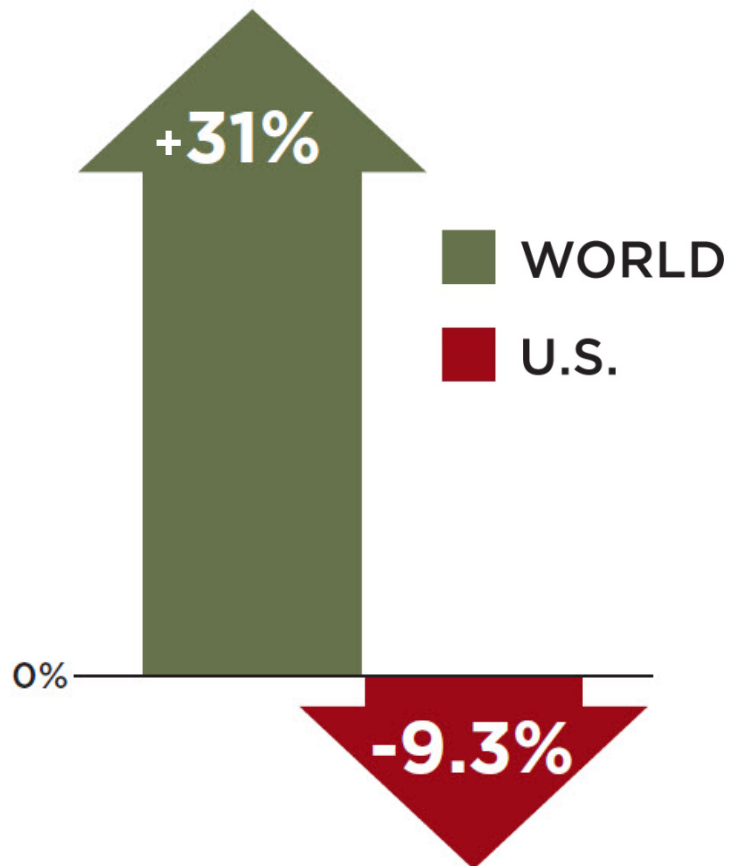
Overseas Arrivals to the U.S. 1990 – 2009*



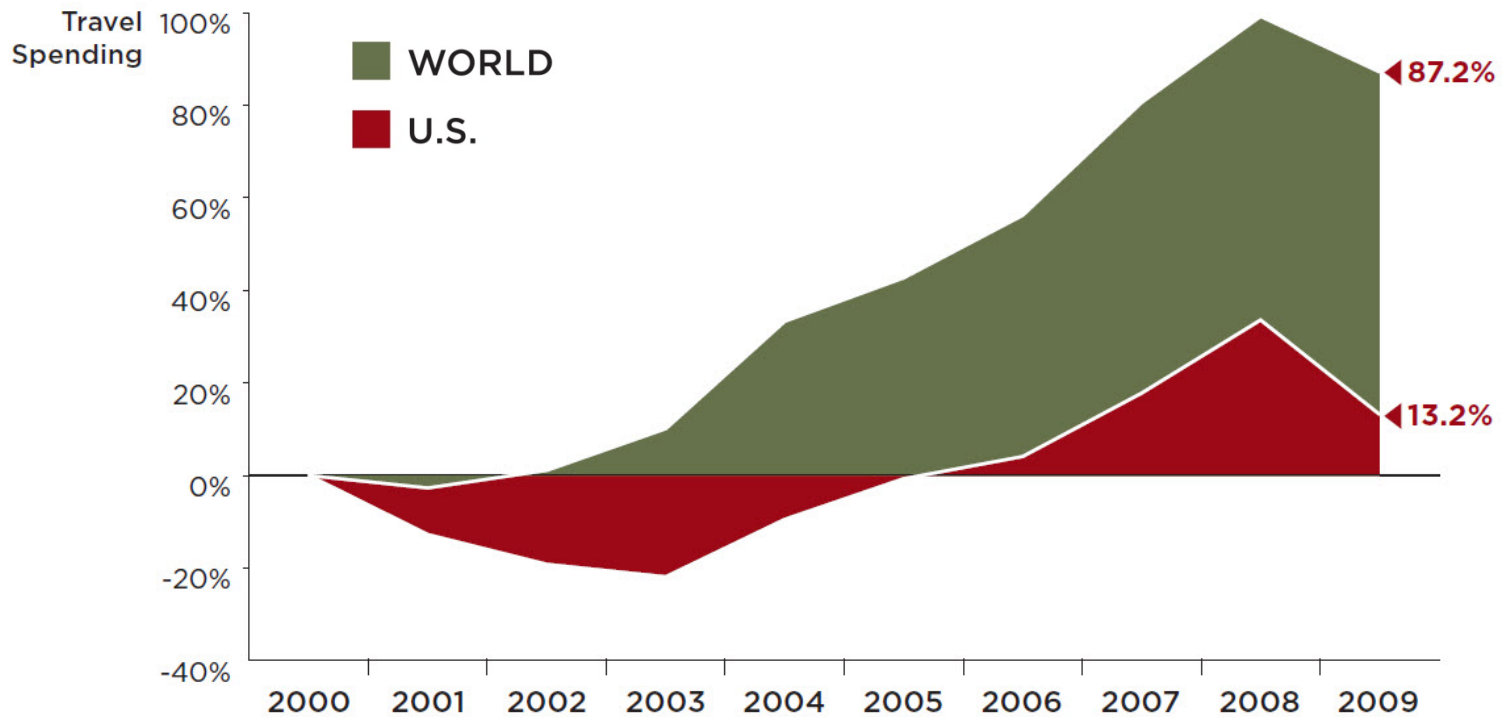
* Overseas arrivals through November 2009

Source: U.S. Department of Commerce - Office of Travel and Tourism Industries

Global Long-Haul Travel: 2000 to 2009



2000-2009 Travel Spending: A Global Gold Rush



Value of Inbound Travel



Overseas travelers stay longer, spend more:

- **16 nights**
- **\$4,000+ (USD)**

Those who have visited the U.S. are **74%** more likely to have a favorable opinion of our country.

With Headlines Like These
It's No Wonder Overseas Travelers
Are Avoiding the United States



“Fortress America”
mentality resulted from
necessary security
measures created
post 9/11

Discover America Partnership



Competing on the World Stage

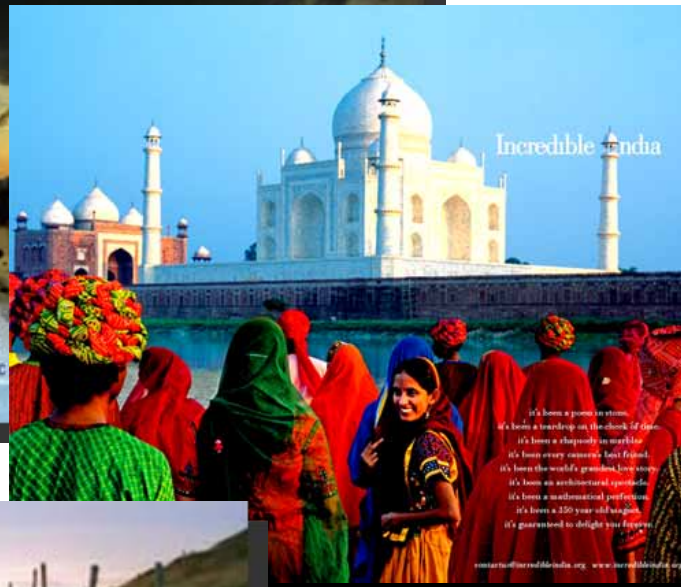
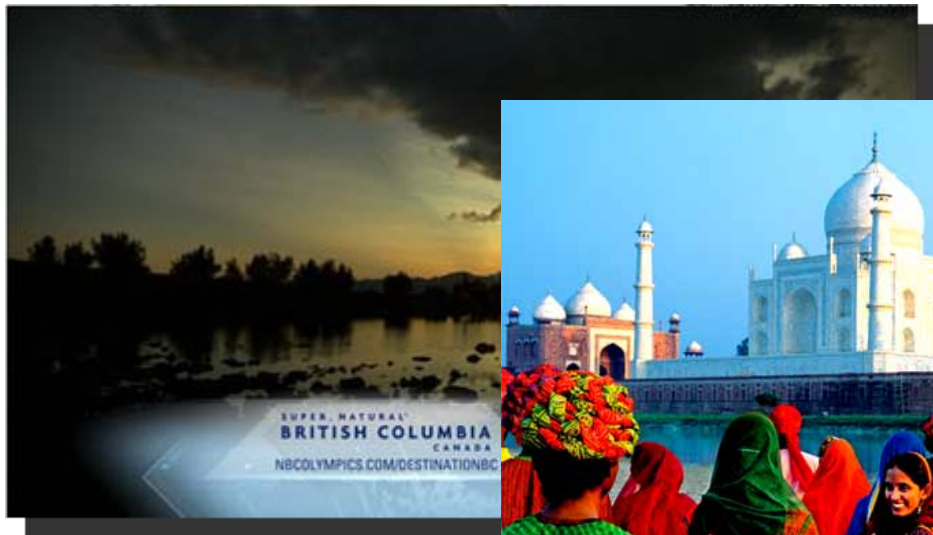


FIGURE 8. TOP 10 COUNTRIES' MARKETING BUDGETS

NATION	PROMOTIONAL SPENDING in Millions (2005)
Greece	\$151.4
Mexico	\$149.2
Malaysia	\$117.9
Australia	\$113.3
U.K.	\$89.2
Turkey	\$80.0
France	\$63.3
Italy	\$61.9
China	\$60.0
Canada	\$58.5
U.S.	\$0.0

Source: UNWTO

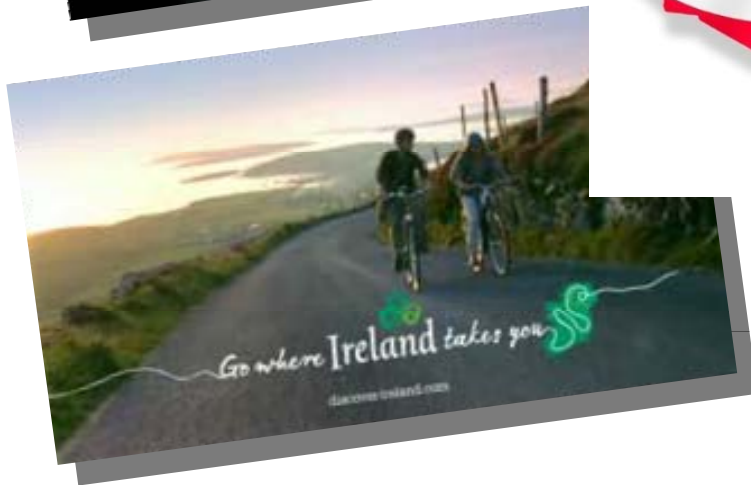
U.S. State Ad Campaigns

I ♥ NY[®]



Virginia ♥
is for Lovers[®]

U.S. Lacks Competitive Program to Welcome/Inform Travelers



Travel Promotion for the United States



Official White House Photo by Lawrence Jackson

Travel Promotion Program: Best-Case Implementation Scenario

February '10 – Passage

TPA passage achieved with bipartisan vote in Congress

March '10 – Enactment

TPA enacted into law

Corporation for Travel Promotion (CTP) legally establishes as a non-profit in Washington, DC

U.S. Travel involved in discussions with White House, Congress and Departments of Commerce, Homeland Security and State on TPA implementation

Year 1 – Goals

DOC establishes Office for Travel Promotion and hires a Director to run the office (*within 6 to 12 months, appropriated funds necessary from Congress*)

Secretary of Commerce appoints CTP Board (*within 6 to 9 months*)

U.S. implements collection of ESTA fee (*within 8 to 12 months*)

CTP board hires executive director, staff (*1 to 3 months following transfer of first set of ESTA fees to CTP*)

CTP executive director begins to hire staff

CTP begins market research

CTP begins discussions with industry on matching funds

Year 2 – Goals

Implements program to generate funding from private sector

Finalizes initial marketing plan

Limited USA marketing begins

DiscoverAmerica.com: Official Travel and Tourism Website of U.S.

The screenshot shows the DiscoverAmerica.com website interface in Japanese. At the top, there is a navigation bar with '目的地' (Destination), 'アクティビティ' (Activities), '旅行記' (Travelogue), 'アメリカ基本情報' (USA Basic Information), '入国手続き' (Entry Procedures), and 'ご予約' (Reservations). A search bar is located in the top right corner. Below the navigation bar, the main content area is titled 'テキサス州' (Texas) and includes a dropdown menu for '別の州を選択' (Select another state). A featured article titled '写真' (Photo) shows a night view of the Austin skyline with the caption 'タイトル: オースティンのスカイライン (Austin Skyline)'. The article is attributed to '投稿者: Austin Convention and Visitors Bureau'. To the right of the article is a sidebar with search filters for 'アメリカの旅行先' (Travel destination in America), '他のU.S.目的地' (Other U.S. destinations), and 'アクティビティを選択' (Select activities). Below the sidebar is a '投稿' (Post) section with a 'ニュースレターへのサインアップ' (Sign up for newsletter) form. At the bottom, there is a '地図を見る' (View map) button and a '旅行記' (Travelogue) section with a photo of a city street.

- U.S. Dept. of Commerce
- Targets 5 leading inbound markets (CN, MX, UK, JP, DE): 37 million+ travelers
- Launched 2008
- Content on all 50 states, 5 territories
- Up to 115 cities
- First stop, not the last stop
- Links to State, DMO sites

www.DiscoverAmerica.com/JP