TRAVEL SOUTH USA 2018-2019

Strategic Business Plan & Global Program of Work

TRAVEL · SOUTH USA

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Letter from Kristen Branscum

Every Southern kitchen has a family recipe that is passed down from generation to generation and that recipe is the key to what is usually one of the best bites of food or sips you have ever put into your mouth. In Kentucky, we find that a lot of our family recipes are of the secret kind; from bourbon mash bills to the Colonel's blend of spices, many are left searching for these missing pieces that are necessary to create greatness.

In the Travel South USA region, the recipe for domestic and international tourism success is not a secret one. The organization and the destinations that make up Travel South know the steps to follow and understand that working together to create something special is more rewarding and effective. While each state may compete for market share, it's our Southern sense of family and pride in our region that compel us all to work together and leverage our individual strengths to grow visitation and increase the dollars that flow into our communities.

The Travel South USA organization is looked upon by other destination collectives as the example to follow for regional collaboration. In order to sustain our growth, we must continue to be adaptable, stay on the forefront of trends and set measurable goals and outcomes for success.

During my time as Chair, I would like to focus on the following three areas that I believe are strategically imperative for Travel South's continued evolution.

- As marketing dollars and overall budgets ebb and flow, **earned media** is an area where every destination can increase exposure and recognition to domestic and international travelers. While states interface with the media currently through Domestic and International Showcases, a revamping of both to include more opportunities for thoughtful interaction to tell our stories will be addressed. There is no shortage of places, attractions and people in the South to pitch to journalists and now we will have a better stage in which to increase our earned media impact.

- **Research** will continue to be the foundation of our decision making for marketing and positioning in the global tourism marketplace. Travel South will invest in both domestic and international research to provide the baseline visitation information, while exploring avenues that provide real-time market intelligence.

- The **Global Partner Program** now has participation from all states, which is certainly a celebrated milestone. Now we must move into the next phase of GPP where we use our combined leverage to grow the program and our international bandwidth as a region. We will develop short-term and long-term plans to address how we as individual states must plan and interact with Travel South country-specific plans for optimal results.

It is my absolute honor to serve as the FY 18/19 Travel South USA Board Chair. I promise to work diligently to achieve our mutual goals, while utilizing our public and private dollars in an effective and efficient manner.

Cheers!

Kristen R. Branscum
Commissioner, Kentucky
Department of Tourisim
Travel South USA Chair

Board of Directors

Chair

Kristen Branscum
Commissioner, Kentucky Department of Tourism

Vice Chair

Duane Parrish
South Carolina Department of Parks, Recreation & Tourism

Secretary and Treasurer

Chelsea Ruby
West Virginia Deputy Secretary of Commerce/Commissioner of Tourism

Immediate Past Chair

Wit Tuttell
Executive Director Visit North Carolina

Lee Sentell
Director, Alabama Bureau of Tourism and Travel

Jim Dailey
Tourism Director, Arkansas Parks and Tourism

International Committee Chair

Kevin Langston
Deputy Commissioner, Georgia Economic Development, Tourism Division

Advertising Chair

Doug Bourgeois
Asst. Secretary, Louisiana Office of Tourism

Earned Media Chair

D. Craig Ray
Director, Mississippi Development Authority

Ward Franz
Director, Missouri Division of Tourism

Kevin Triplett
Commissioner, Tennessee Department of Tourist Development

Rita McClenny
President/CEO, Viriginia Tourism Corporation

Liz Bittner
President/CEO, Travel South USA

Our Southern Brand

TRAVEL·SOUTH USA

With a warm welcome and that famous Southern hospitality, the South greets travelers with a magnitude of unique experiences that cater to every demographic and budget.

Offering diverse music scenes, rich heritage, renowned sporting events all served up with incredible culinary delights, the region is a perfect self-drive collection of diverse states, cities and outdoor adventures. And with direct gateway access and strong regional air lift, travel to and within Southern USA has never been better.

About Us

Travel South USA is the official regional destination marketing organization for the Southern United States. The non-profit organization promotes travel to and within its member states of *Alabama*, *Arkansas*, *Georgia*, *Kentucky*, *Louisiana*, *Mississippi*, *Missouri*, *North Carolina*, *South Carolina*, *Tennessee*, *Virginia*, *and West Virginia*. Travel South USA serves as marketing partner and information source for journalists, tour operators, influencers and other travel professionals.

Headquarters

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Catherine Li
Business Development Specialist - China Initiative

Angelica De Stefano
Coordinator, Event Marketing & Communication

Background
Travel South USA 1965-2017

On February 10, 1965, a nine-member coalition of state travel directors from Alabama, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Virginia met by directive from the Southern Governors' Association to exchange information about travel operations and promotions of each state. During this first meeting, the Governors agreed to sponsor a joint advertising program campaign in "Holiday" Magazine.

The ads spotlighted a member state each month while promoting the South as a vacation region. A call-to-action-mail-in-coupon tracked 1,670 readers requesting information.

Based on the campaign's success, at the 34th Annual Southern Governors' Association meeting in Charleston, SC, the Southern Travel Directors Council (STDC) was formed when eleven (11) Governors signed a resolution to promote, stimulate, foster and encourage travel to and within the region. Discussions focused on budgets, sharing of staff job descriptions for new welcome centers in Georgia and Florida, joint advertising and mutual efforts towards legislative support for new film commissions.

STDC incorporated on June 18, 1971, and later that year the 11 member states coalition adopted annual dues of $15,000 per state, with the travel directors serving on the governing board. The Travel South USA tagline was developed for advertising and promotion and continues to be the branding reference and current name of the organization. The group enjoyed many successes throughout

Background

Travel South USA 1965-2017

the 70s, 80s, and 90s, including award winning programs in USA, Canada, Japan and Brazil with partners such as Westin Hotel Group, Paramount Studios, Delta Air Lines and many others. In 1998, West Virginia joined the organization as the 12th state. Visit Florida decided to leave the organization in 2010, citing financial reasons.

In early 2011, the Board recognized it was time to re-enter the global marketplace, and in the spirit of cooperation, reached out to partner with the Rhythms of the South Alliance (Atlanta CVB, Nashville CVC and New Orleans CVB) to launch a new internationally focused marketplace. The two groups quickly agreed and Travel South USA International Showcase and Super FAMs was born.

Travel South Domestic Showcase (as it is now called) has continued to be the flagship program for the organization, focusing on balanced attendance with great industry ratios for appointments, strong participation in tour operator and journalist FAMs and high satisfaction scores.

In 2015, the Board invited Missouri Tourism to join Travel South USA. Missouri is part of the Southern Governors' Association and complements the tourism product of the south with strong connections in music, food, history, culture and of course, SEC college football.

Today, the future remains bright for the oldest, largest and strongest regional destination marketing organization in the country. We provide a foundation to positively position tourism as a vital and dynamic element in the region's economic development. Tourism ranks throughout the region as one of the top three industries, behind manufacturing and agriculture, and is responsible for $133 billion in spending by visitors, generating 1.4 million direct jobs, $30 billion in worker paychecks, and almost $16 billion in state and local taxes. A full history is available at www.industry.travelsouthusa.com

Mission

Travel South USA was formed in 1965 by a resolution presented at the Southern Governor's Conference by the Southern Travel Directors Council.

The Travel South USA partnership provides a foundation for collaboration by state tourism offices to position tourism as a vital and dynamic element in the region's economic development.

Since 1965, the mission of Travel South USA is to promote, foster and encourage travel to and within its member states by:

- Exchanging ideas and programs which would be of mutual benefit
- Organizing promotional opportunities with a solid purpose, accountable results and continuity
- Fostering regional promotional plans throughout the South
- Working closely with destination marketing organizations, chambers of commerce and other travel oriented organizations
- Raising the economic standing of the South and member states through successful promotional efforts
- Building the image of the South and member states as progressive, dynamic, enjoyable and scenic travel destinations
- Positioning tourism as a vital and dynamic element in the South's economy
- Providing opportunities for destinations and travel-related companies to market themselves to established travel buyers in North America and select international markets

Organizational Resources and Partnerships

Partnerships

We also have a small select group of high value partnerships which currently include:

- American Airlines
- American Bus Association
- Brand USA
- British Airways
- Delta Air Lines
- Laurie Rowe Communications, Inc. (LRC)
- Miles Partnership
- Rhythms of the South
- Sparkloft Media
- Tourism Economics, An Oxford Economic Company
- Tourism Skills Group
- The Group Travel Leader, Inc.

Travel South USA Program
Framework

TRAVEL·SOUTH USA

DOMESTIC PROGRAM OF WORK

Public Relations

- Earned Media Outreach & Reporting
- Media Marketplace (As part of Showcase)
- Journalist Pre-FAMs (As part of Showcase)
- Ultimate Ad Challenge

Trade

- Domestic Showcase & Pre/Post FAMs
- ABA Participation
- Travel South Tour Planner

Research

- ABA Foundation – Economic Impact Study

Travel South Group Tour Operator FAM

Journalist Program

2018 Domestic Showcase

INTERNATIONAL PROGRAM OF WORK

Public Relations

- Visiting Journalist Program
- Social Media Outreach
- Earned Media Outreach & Reporting

Trade

- International Showcase & Super FAMs
- On-going Co-Ops
- GPP sales calls, meetings & trainings
- Trade FAMs
- WTM London Participation
- WTM Latin America Participation
- Annual Sales Mission
- Annual Tour Operator Product Audits

Consumer

- VisitTheUSA.com/TravelSouth (Microsite/Digital Content)
- Inspiration Guide Reprints
- Brand USA's Multi-Channel Programming

Research/Reporting

- Tourism Economics Data
- Monthly GPP Reports including Industry Insights

WTM London

2017 International Showcase

2018 Pan European Sales Mission

Strategic Summary
Plan & Tactics

TRAVEL SOUTH USA

Strategic Plan
Summary

Travel South USA is the leadership organization that provides regional marketing and promotional efforts targeting domestic and international markets.

For over 50 years, Travel South USA has served as a trusted source of information and resources for tour operators, journalists, media outlets and consumers, and while the channels and methods have evolved, sharing our stories, connecting people with the resources available and facilitating planning a trip to the region has remained constant.

In FY 18/19, we plan to:

- Enhance Earned Media Programing and Reporting
- Gain Global Market Share through PR, Trade and Consumer Outreach
- Grow Value Driven Partnerships
- Amplify Partner Marketing Investments

More Inspiration Deepened Relationships and Expanded Storytelling

Foundational Steps

TRAVEL·SOUTH USA

Guided by Research, Brand Inspiration, Travel Trade Partnerships, Earned, Owned & Paid Media and Partner Engagement, the Travel South USA region will leverage our collective resources to gain market share, increase our reach, awareness and engagement in consumer and travel-trade global marketplaces.

Level One 1

Build a Strong Foundation

- Global Research
- Digital Strategy
  www.visittheusa.com/travelsouth
  and www.gousa.cn/travelsouth
- Global Social Media Channels
- Multi-state Itineraries
- In-language Inspiration Guides
- Earned Media Outreach
- Travel South Domestic Tour Planner

Level Two 2

Create Distribution Systems

- International Showcase & Super FAMs
- Domestic Showcase & FAMs
- US Inbound Operator Missions
- Product Development
- Travel-Trade Partnerships
- Trade Shows
- Visiting Journalist Programs

Foundational Steps

Level Three 3

Manage Partner Engagement

- Provide Market-Ready Insights
- Brand USA Reporting & Analysis
- Industry Partner Communication & Engagement
- Ultimate Ad Challenge

Level Four 4

Invest in Global Partners Programming

Pay to Play

- Year-Round Representation
- Enhanced Research
  - In-depth market profiles
  - Tour operator product analysis
- Tour Operator/Trade Sales Calls, Trainings, Promotions
- Overseas Sales Missions
- Invest in Brand USA
  - Digital Marketing
  - Multi-channel Programs
  - China Digital & Social
- Pro-active Earned Media: Print & Social

Global Strategy & Tactics

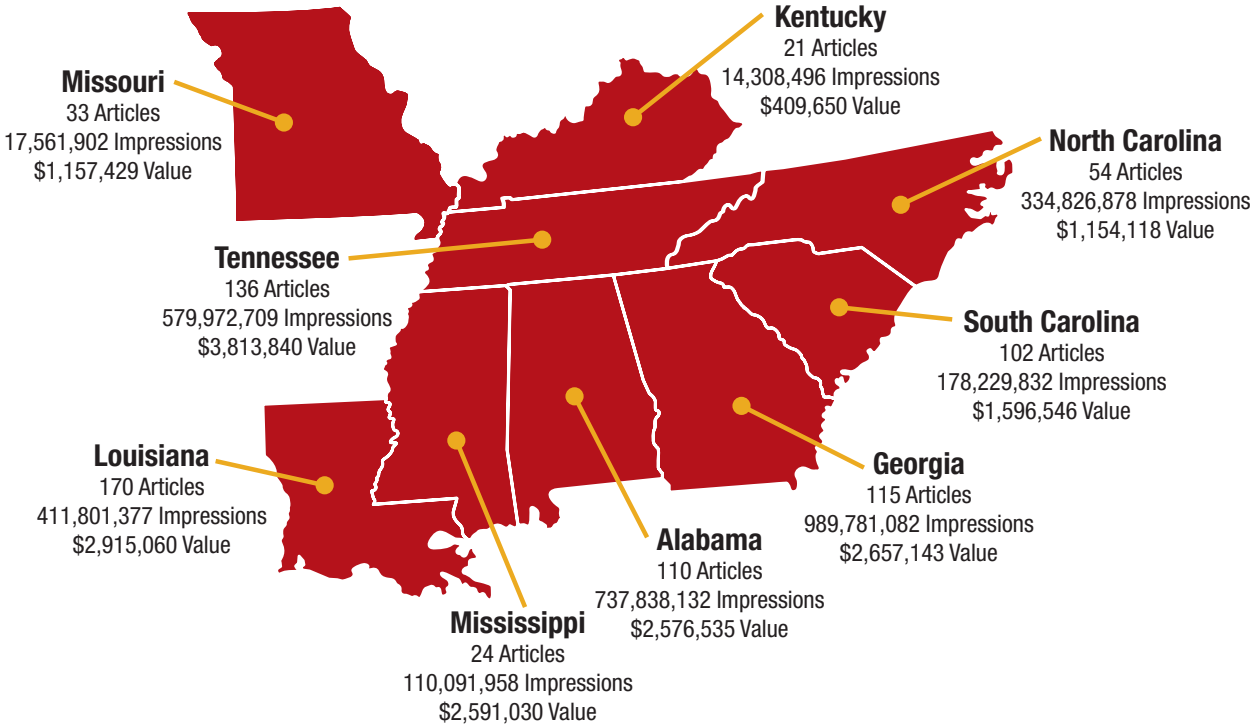
Trade

Travel South USA will continue to prioritize recruitment of top-tier operators from select countries to attend the 2018 International Showcase and participate in Super FAMs.

Global Partner Program will continue to evolve and meet the ever-changing needs of the partners. Travel trade training, tour operator co-ops and product development will remain the priority, In certain countries, highly visible trade show stands with a collaborative message will send a clear message the South is invested in international marketing.

Earned Media

Travel South USA will continue to organize group media FAMs and visiting journalist itineraries on a case-by-case basis with primary focus on showcasing the undiscovered destinations and lesser known attractions.



Consumer

Travel South partners heavily with Brand USA and leverages their channels and assets to promote destinations throughout the region directly to potential international visitors.

Travel South's recommended core programming for States & City DMO partners in FY19 includes:

1. 2019 Inspiration Guide:

- Co-op opportunities available in most States
- Foundational marketing product that is distributed in print and digitally in 50 countries and translated into 9 different languages.
- Travel South USA uses the content and advertising from this product to produce an official Travel South USA guide
- 78.6% of potential international visitors said this product increased their bookings to the USA.
- Advertising participation starts at $27,900 per page

2. Digital Content on www.VisitTheUSA.com:

- Content pages on the USA's official destination website provides international visitors key inspiration and planning information for Travel South.
- State pages, city page, experience pages and video storytelling pages available for DMO partners.
- Content investment starts at $8,500 for renewal of current content pages and $10,000 for new content pages include China.
- Video storytelling and trips creation starts at $18,325

3. Multi-channel programs

- Multi-channel programs in UK, Germany, Australia, Canada, China are primarily planned for the Travel South region. Includes cross-channel content marketing in country with top media partners such as Expedia, Google, Facebook and leading print publications.
- Multi-channel programs drive direct ROI for DMO partners.
- Advertising participation starts at $9,700.

4. China

- China is a highly important, but highly complex market. Travel South USA has worked with Brand USA to develop three different packages for DMO partners to market to Chinese travelers.
  - i. Step One Programming = $15,000
    Includes four state or city pages translated GoUSA.cn (renewal) with Baidu search/PPC campaigns to drive traffic to the pages
  - ii. Step Two Programming = $39,000
    Includes step one programming PLUS tier two China multi-channel program valued at $24,000
  - iii. Step Three Programming = $113,000
    Includes step one programming PLUS tier one China multi-channel program valued at $48,000 PLUS tier two Ctrip add-on valued at $50,000

Research
Foundation

TRAVEL·SOUTH USA

Research
Global Insights

Travel South USA is proud to commission custom research to measure travel and tourism in the region and state-by-state that is designed to develop and inform the organization and sponsor states on:

1. Reporting on Global visitation, spending and visitor characteristics
2. Measuring program effectiveness
3. Guiding strategy and investments

The International Research Committee includes senior research staff from state tourism departments and offers a forum for discussion and collaboration between states. Travel South USA currently invests in domestic and international research using the following vendors:

Tourism Economics International Market Opportunity for Travel South USA

Tourism Economics, an Oxford Economics company, looks at eight data sets of international travel to assess the international market opportunity for the region and each sponsor state. This analysis provides a perspective on the size, scope and prospects of international markets that are both fact-based and action-oriented.

American Bus Association Foundation – Bi-Annual Economic Analysis of Motorcoach Economic Impact Report

The American Bus Association Foundation's Motorcoach Group Tourism Economic Impact Study estimates the economic contributions made by the motorcoach group tour industry to the U.S. economy. John Dunham and Associates conducts this research, which is funded by the American Bus Association Foundation (ABAF). This study uses standard econometric models that were first developed by the U.S. Forest Service and are now maintained by the IMPLAN Group LLC. Data came from industry sources, government publications and Dun and Bradstreet, Inc.

GLOBAL PARTNER PROGRAMMING

STORYTELLING

RESEARCH MEDIA RELATIONS

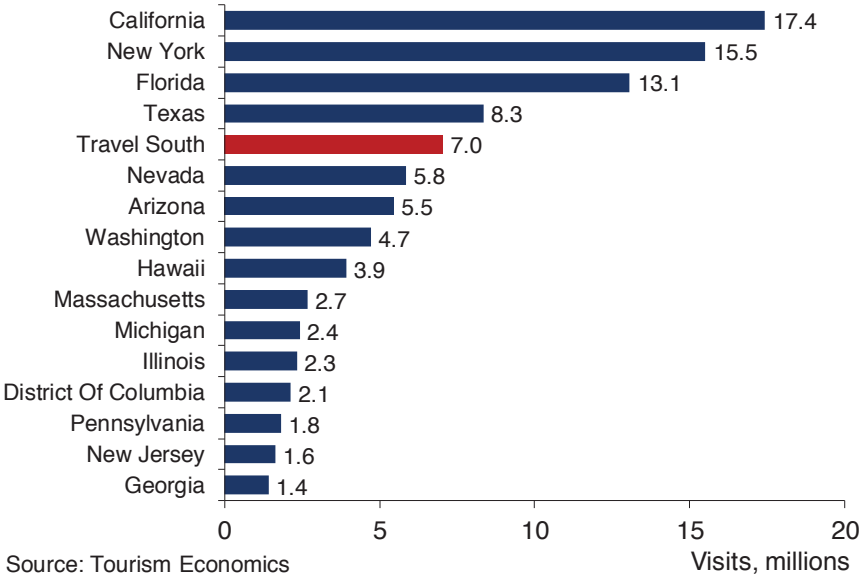
DIGITAL MARKETING & ADVERTISING

CO-OP MARKETING PARTNERSHIPS

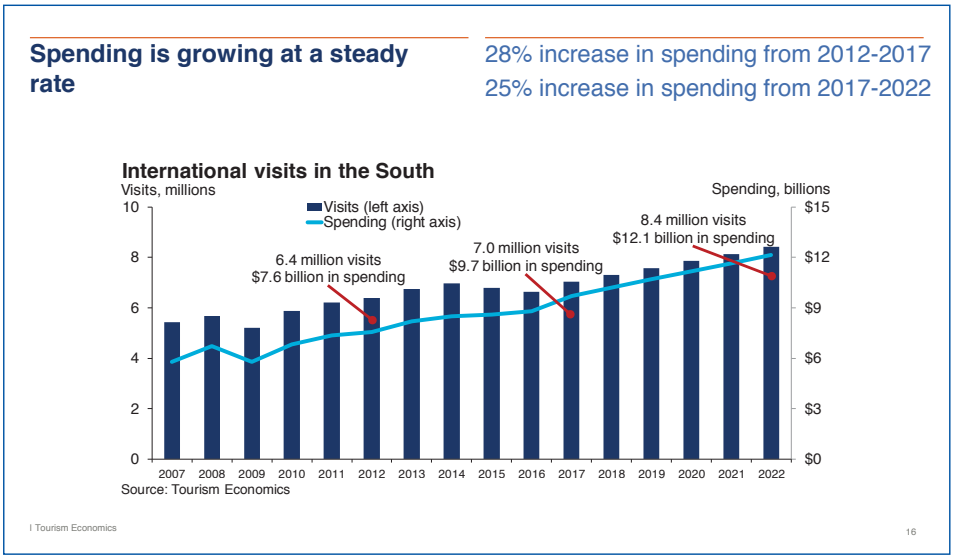
INTERNATIONAL & DOMESTIC SHOWCASE FAMs

TRAVEL·SOUTH USA

If Travel South USA were a state – we would be the fifth most visited region behind California, New York, Florida and Texas



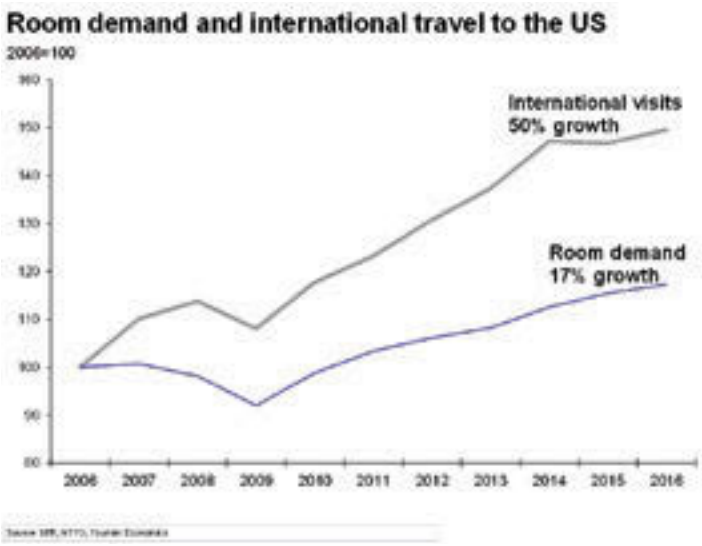
And spending by international travelers in our region is expected to continue grow



Research
Global Insights

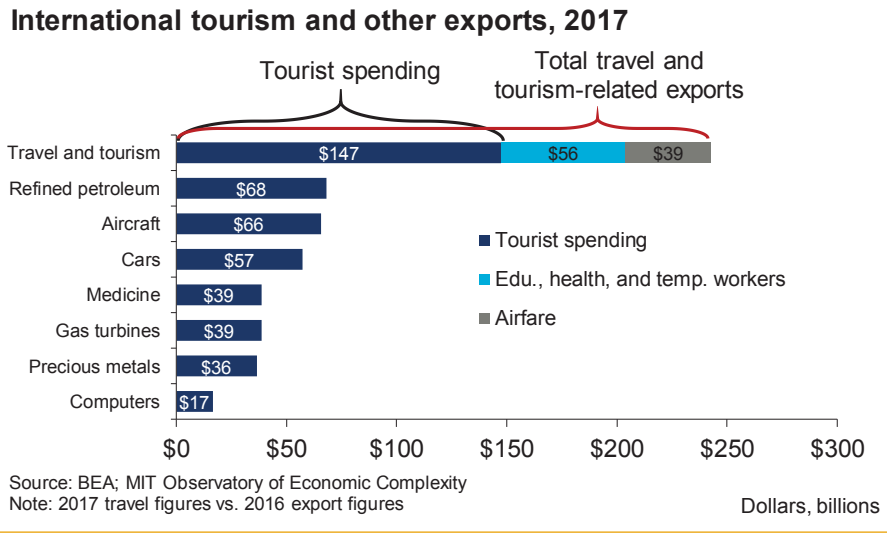
International visits to the US have outpaced domestic travel demand over the past decade

The international share is increasing in importance



Tourism easily exceeds export goods such as cars, medicine, and computers

Tourism is a major source of foreign currency



www.TravelSouthUSA.org

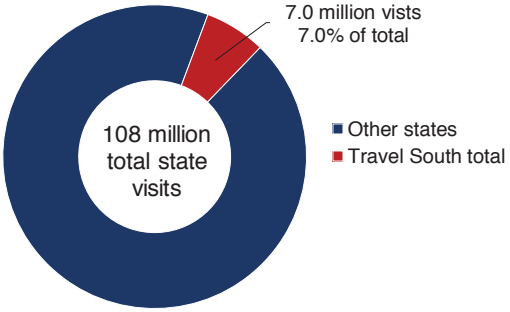
Travel South member States continue to attract international visitors, gaining market share in both visits and spend.

The Travel South States receive 7% of international visits and 6% of international spending

Tourist made 7.0 million state visits and spent $9.7 billion in The South

International state visits, 2017

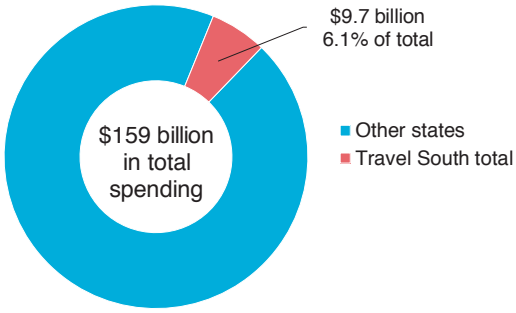
000's and percent of total



Source: Tourism Economics

International state spending, 2017

Dollars, millions and percent of total



Source: Tourism Economics

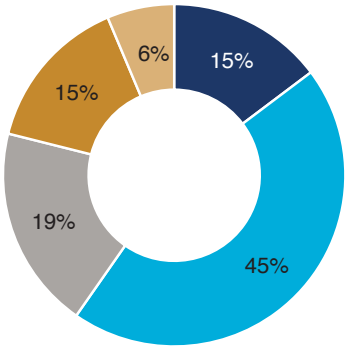
International spending continues to change the landscape, adding additional value for growth markets. From 2007 to 2017, Asia Pacific grew from representing 19% of total spend to our region to 26%.

A shift in orgin markets is occuring

Three non-traditional markets grew to 49% of total in 2017 from 40% in 2007

Spending to the South by region, 2007

Spending, millionsand percent of total

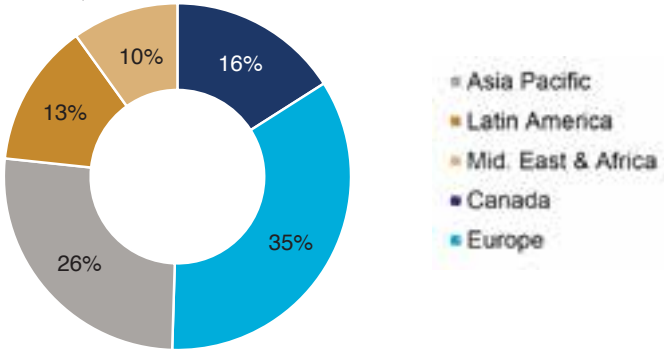


Source: Tourism Economics

I Tourism Economics

Spending to the South by region, 2017

Visits, 000's and percent of total



Source: Tourism Economics

Research
Global Insights

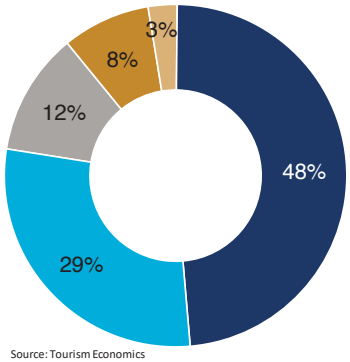
While Europe remands the largest percentage of visits to the South, emerging marketing such as China and Latin America continue to grow, outpacing other markets.

A shift in orgin markets is occuring

Three non-traditional markets have grown to 31% of total in 2017 from 23% in 2007

Visits to the South by region, 2007

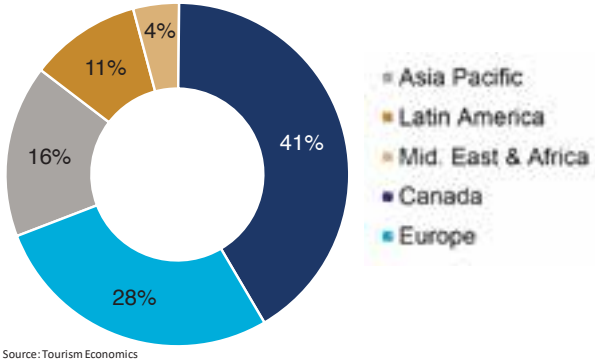
Visits, 000's and percent of total



Source: Tourism Economics

Visits to the South by region, 2017

Visits, 000's and percent of total



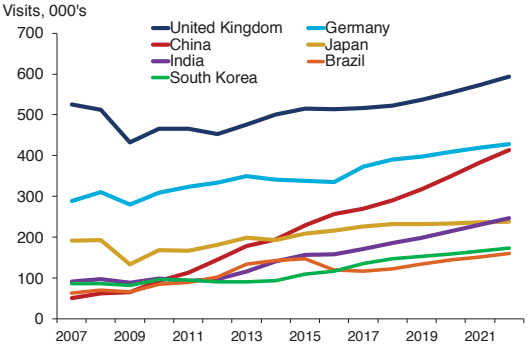
Source: Tourism Economics

China will soon be the largest overseas market in terms of spending.

Developing markets are surging

International visits to the South

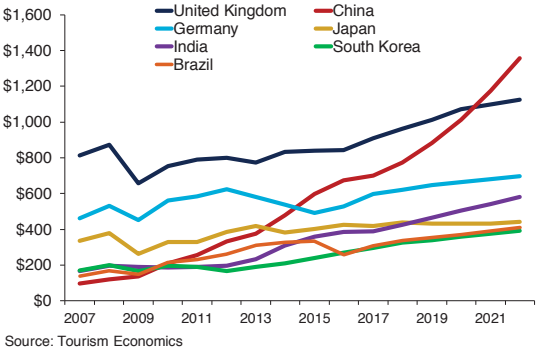
Visits, 000's



Source: Tourism Economics

International spending in the South

Dollars, millions



Source: Tourism Economics

Programing & Distribution

Channels

TRAVEL SOUTH USA

Digital Marketing

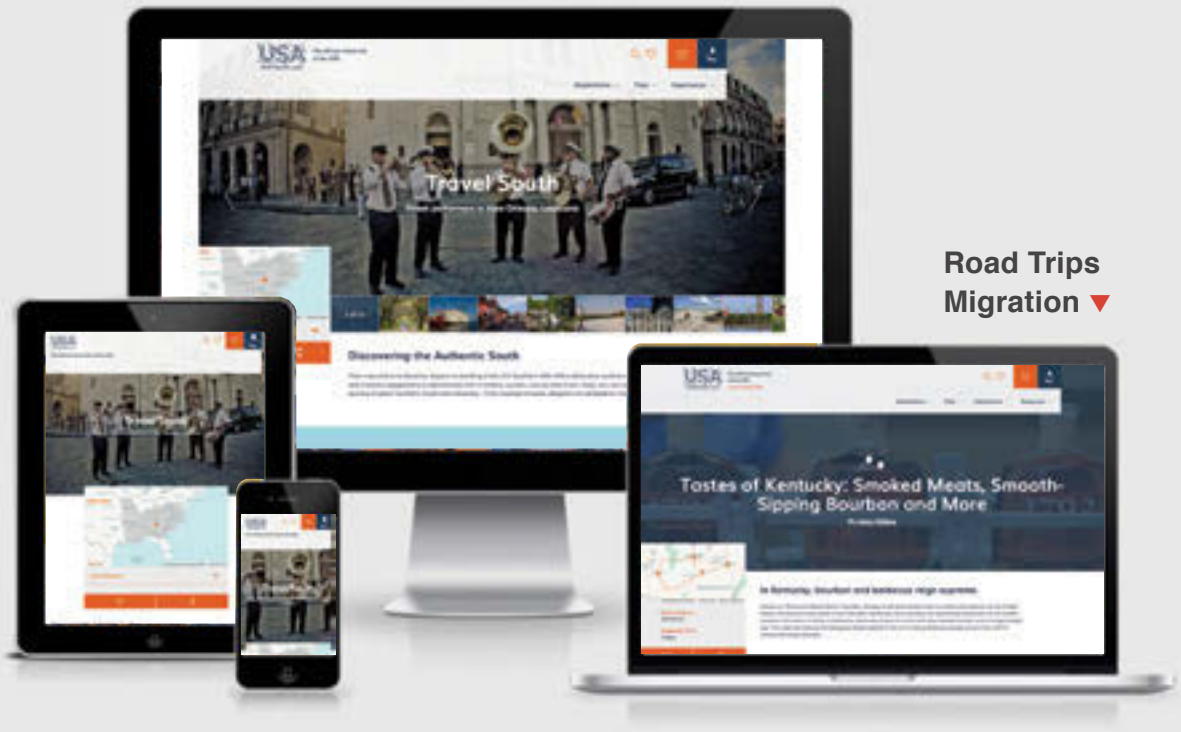
Travel South USA along with our Agency of Record, Miles Partnership in collaboration with seven in-country representation trade & PR firms has created content, videos and road-trips in 12 languages and trained thousands of tourism professionals.

This streamlined approach has paid off with a 500% increase in year over year pageviews on VisittheUSA.com and GoUSA.cn showing increased earned media and higher level promotional efforts with the travel trade. Potential international visitors from around the globe are spending more time and having more engagement with content on state/city landing pages, experience pages on destinations throughout Travel South, as well as robust trip ideas that help these visitors plan their travels around the region.

Create a place where international visitors can find information on the South:

VTUSA Microsite ▼

Road Trips Migration ▼



Digital Marketing

Priorities for Investment by State & Partners in FY 18/19

- Inspiration Guide
- VisittheUSA.com Content
- Multi-Channel Programs
- China

Australia FY 18 Multi-Channel

Germany FY 18 Multi-Channel

Brand USA Multi-Channel Campaigns

- Multi-Channel programs in UK, Germany, Australia, Canada, China are primarily planned for the Travel South USA region. Includes cross-channel content marketing in country with top media partners such as Expedia, Google, Facebook and leading print publications.

Ultimate Advertising Challenge

What began in 2006 as a "smack down" of magazine advertising publishers has evolved over the past decade to be a key component in leveraging multi-state advertising campaigns in both print and digital mediums.

The program has become one of the most valued activities by the Travel South Board of Directors and is highly competitive for vendors who earn a "spot" in the Top Eight presentations. There is no other organization that can offer the streamlined access to the southern state tourism directors and their offices' advertising decision makers.

Over the course of the past 10 years, collectively, Travel South sponsor states have cooperatively organized digital, print, out-of-home and event-focused advertising campaigns exceeding $10 million in national publications such as:

- Food Network Magazine
- Smithsonian
- Lonely Planet
- Matador
- Meredith
- ADARA
- Hoffman Media
- Expedia Media Solutions

Domestic
Showcase

TRAVEL·SOUTH USA

Travel South Showcase began in 1983 as the first regional, computerized marketplace to bring more group travel business to the southern states. The goal was to provide an easy and efficient way to book business for the South. The first year in Tampa, Florida, had a robust turn-out with 35 tour operators and 65 tourism suppliers meeting in one-on-one appointments.

Today, the marketplace is recognized as the Best in Class Marketplace in the group tour industry. Attendance has grown to over 600 delegates and we consistently receive outstanding satisfaction scores. During the 3-day marketplace, we deliver 13,000+ pre-scheduled business appointments. Seventy-five percent of operators indicate they are highly likely to include attractions/destinations visited on Showcase City Tours & FAMs in their upcoming group and FIT programming.

According to the American Bus Association Foundation's Economic Impact of the Group Travel and Tourism study, Travel South USA member states serves a total of 43,993,700 group tour visitors. As a result, overall sales in Travel South member states coming from motorcoach tourist totaled $15.25 billion and contributed to the total economic impact exceeding $28 billion dollars in 2016.

Travel South USA Domestic Showcase hosts include:

1983 Tampa, FL
1984 Little Rock, AR
1985 Louisville, KY
1986 Virginia Beach, VA
1987 Orlando, FL
1988 Memphis, TN
1989 New Orleans, LA
1990 Atlanta, GA
1991 Winston-Salem, NC
1992 Birmingham, AL
1993 Little Rock, AR
1994 Nashville, TN
1995 Atlanta, GA
1996 Myrtle Beach, SC
1997 Louisville, KY
1998 Gulfport/Biloxi, MS
1999 Greensboro, NC
2000 Charleston, SC
2001 New Orleans, LA
2002 Hot Springs, AR
2003 Savannah, GA
2004 Mobile, AL
2005 Memphis, TN
2006 Richmond, VA
2007 Myrtle Beach, SC
2008 Mississippi Gulf Coast, MS
2009 Kissimmee/St. Cloud, FL
2010 Birmingham, AL
2011 Atlanta, GA
2012 Louisville, KY
2013 Little Rock, AR
2014 Charleston, WV
2015 Shreveport, LA
2016 Winston-Salem, NC
2017 Branson, MO
2018 Mississippi Gulf Coast, MS
2019 **Myrtle Beach, SC**
Feb 24-27, 2019
2020 Baton Rouge, LA
March 8-11, 2020

Domestic Showcase

About Travel South Showcase

Travel South Showcase is the premier Marketplace event in the South where over 500 tourism professionals gather for three days of intensive meetings with a goal of delivering more visitors, spending more time and more money in the South. This regional appointment-style marketplace offers the most targeted opportunity for tour operators and wholesalers to meet face to face with Southern Suppliers.

Domestic Showcase by the Numbers in 2018

- 22 total Mississippi destinations featured on buyer and journalist pre-FAMs.
- Showcase 2018 at the Mississippi Gulf Coast had the highest attendance of any Showcase in more than a decade.
- 89% of Buyer delegates and 87% of Journalist delegates surveyed will likely include an attraction or destination visited on a city tour in future tour packages and published articles.
- There were more than 18,000 appointments scheduled during the Marketplace sessions.
- Mississippi Gulf Coast CVB and Visit Mississippi hosted almost 700 delegates at the 36th Annual Travel South Showcase.

Educational Luncheons & Programing

B2B Pre-Scheduled Appointments

World-Class Entertainment

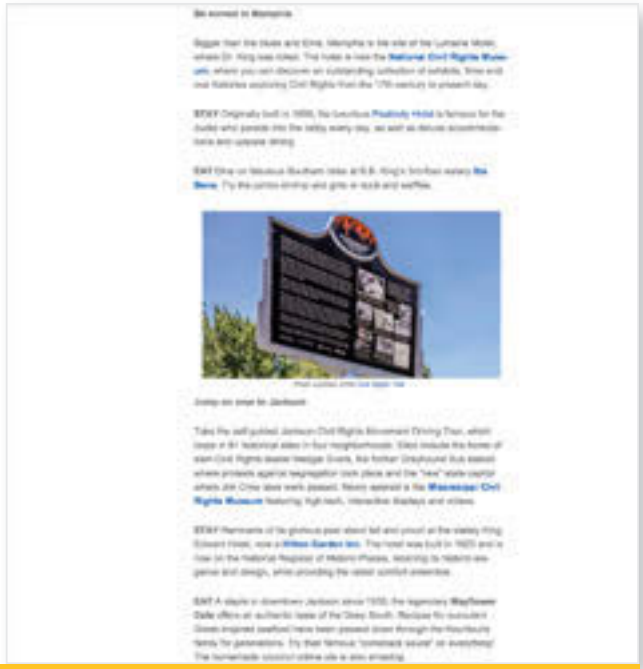
Earned Media
Outreach

TRAVEL·SOUTH USA

Earned media is not FREE, and it doesn't just happen, but everyone agrees that great stories—both in print and online—inspire travel, and TSUSA along with our agency of record, Laurie Rowe Communications, Inc. (LRC), continues to organize and execute FAM trips and Visiting Journalist programs to garner even **MORE** earned media.

2015-18 Earned Media

Year	City/State	Hosted Journalists	Satisfaction on Rating	Results	Impressions	FAMs	Destinations Served	Destinations
2018••	Mississippi Gulf Coast, Mississippi	35 Journalist	4.79	180 print & digital *(Preliminary)*	165,640,000 Impressions *(Preliminary)*	3	19	Southaven, Tunica, Clarksdale, Greenwood, Cleveland, Dockery, Indianola, Hattiesburg, Meridian, Jackson, Tugaloo, Vicksburg, Natchez, Port Gibson, Oxford, New Albany, Columbus, Laurel, Biloxi
2017	Branson, Missouri	27 journalist	5.0	404 published	77.5 Million Online Readership, 16.6 Million Print Impressions	3	14	Branson, Springfield, Carthage, Joplin, Lamar, Mindemines, Ozark, St.Jomes, Rollo, Lebanon, Republic, Eureka Springs, Arkansas, Bentonville Arkansas Rodgers, Arkansas

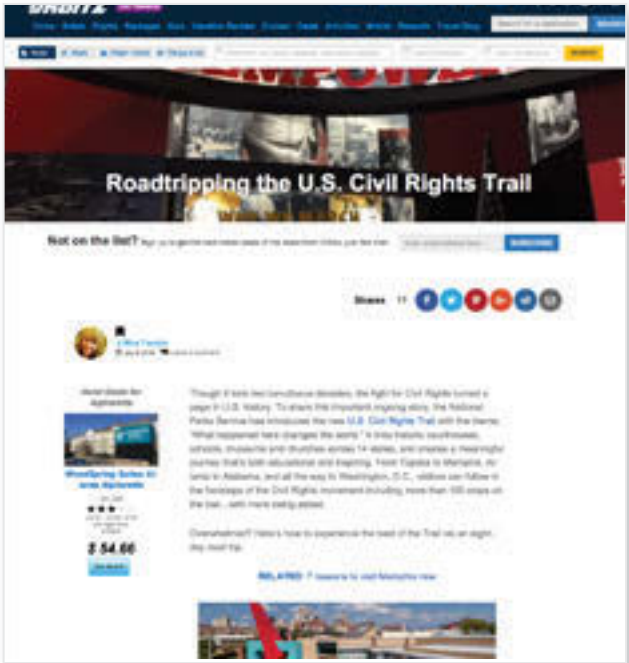


The Philadelphia Sunday Sun

Earned Media
Outreach

2015-18 Earned Media

Year	City/State	Hosted Journalists	Satisfaction on Rating	Results	Impressions	FAMs	Destinations Served	Destinations
2016	Winston Salem, North Carolina	30 journalist	4.65	432 published articles	218,564,356 total media impressions	3	11	Winston-Salem, Charlotte, Concord, Mooresville, Lexington, Outer Banks, New Bern, Raleigh, Shelby, Wilkesboro/North Wilkesboro,
2015	Shreveport, Louisisana	34 journalist	4.5	417 published articles	41,295,654 impressions	1	17	New Orleans, LaPlace, Plantation Country, Baton Rouge, White Castle. Opelousas, St. Landry Parish, Shreveport, Monroe-West Monroe, Natchitoches, Alexandria/ Pineville, Lake Charles, Jeff Davis Parish,



Orbitz.com

International
Showcase

TRAVEL·SOUTH USA

In 2012, in partnership with the Rhythms of The South, Travel South USA launched International Showcase, resurrecting the best aspects of the popular appointment show and providing expanded familiarization opportunities.

The three Rhythms of the South (ROS) cities of Atlanta, Nashville and New Orleans hosted year one, two and three, respectively. Moving forward, the partnership agreed to be in a ROS city every other year, and feature another city in the region during the years between.

The strategy is simple: we aim to connect southern destinations, hotels and restaurants with key decision-makers from targeted origin countries to have more product promotion and sales. We know when buyers are on our soil, they fall in love with the region and return to their tour companies enthused to promote and sell the South. We have seen time and again, once a strong relationship with key international tour operators is cultivated, these operators become our de-facto sales force, and serve as Southern Ambassadors.

State Tourism Sponsors

Sweet Home Alabama – www.Alabama.Travel
Arkansas – The Natural State
Georgia – On My Mind
Kentucky – Unbridled Spirit
Louisiana – Feed Your Soul.
Visit Mississippi – visitmississippi.org
Missouri – enjoy the show
NC – North Carolina
South Carolina – Just right.
The Soundtrack of America – Made in Tennessee – TNVACATION.COM
Virginia is for Lovers
West Virginia

International Showcase

FAM tours of International Showcase host cities and states are as important as the business meetings, and to date we have hosted 38 international FAMs in all 12 sponsor states.

The widely successful International Showcase program schedule includes:

- 2012 Atlanta, GA
- 2013 Nashville, TN
- 2014 New Orleans, LA
- 2015 Charlotte, NC
- 2016 Atlanta, GA
- 2017 Charleston, SC
- **2018 Nashville, TN**
- 2019 St. Louis, MO
- 2020 New Orleans, LA

Over the years, International Showcase has brought top international tour operators to the following cities showcasing to them to vast tourism offerings across our region.

ARKANSAS: Bentonville, Dyess, Fayetteville, Fort Smith, Lake Village, Little Rock, North Little Rock, Pine Bluff, Walnut Ridge

ALABAMA: Birmingham, Florence, Huntsville, Mobile, Monroeville, Montgomery, Muscle Shoals, Phenix City and Tuscaloosa

GEORGIA: Atlanta, Blue Ridge, Cartersville, Columbus, Dahlonega, Golden Isles, Jekyll Island, Jonesboro, Juliette, Lake Lanier, Macon, Savannah, St. Mary's, St. Simons Island, Swainsboro and Tybee Island

KENTUCKY: Ashland, Bardstown, Bowling Green, Lexington, Louisville, Owensboro and Paducah

LOUISIANA: Baton Rouge, Darrow, Houma, Lafayette, Lake Charles, LaPlace, Natchitoches, New Orleans, North Shore, Plantation Country, St. Francesville, Thibodaux and Vacherie

MISSISSIPPI: Clarksdale, Cleveland, Indianola, Mississippi Gulf Coast, Natchez, Oxford, Tunica, Tupelo and Vicksburg

MISSOURI: Pulaski Country, Springfield and St. Louis

NORTH CAROLINA: Asheville, Atlantic Beach, Beaufort, Brevard, Cherokee, Charlotte, Crystal Coast, Morehead City, Nantahala, New Bern and Outer Banks

SOUTH CAROLINA: Camden, Charleston, Greenville, Myrtle Beach, and Rock Hill, Hilton Head Island and Beaufort

TENNESSEE: Bristol, Chattanooga, Franklin, Jackson, Gatlinburg, Knoxville, Lynchburg, Memphis, Nashville, Pigeon Forge and Sevierville

VIRGINIA: Abingdon, Bristol, Hiltons, Norfolk and Prince William County

WEST VIRGINIA: Beckley, Berkeley Springs, Harpers Ferry, Martinsburg, Shepherdstown and White Sulphur Springs

Industry Communication
and Program Timeline

TRAVEL SOUTH USA

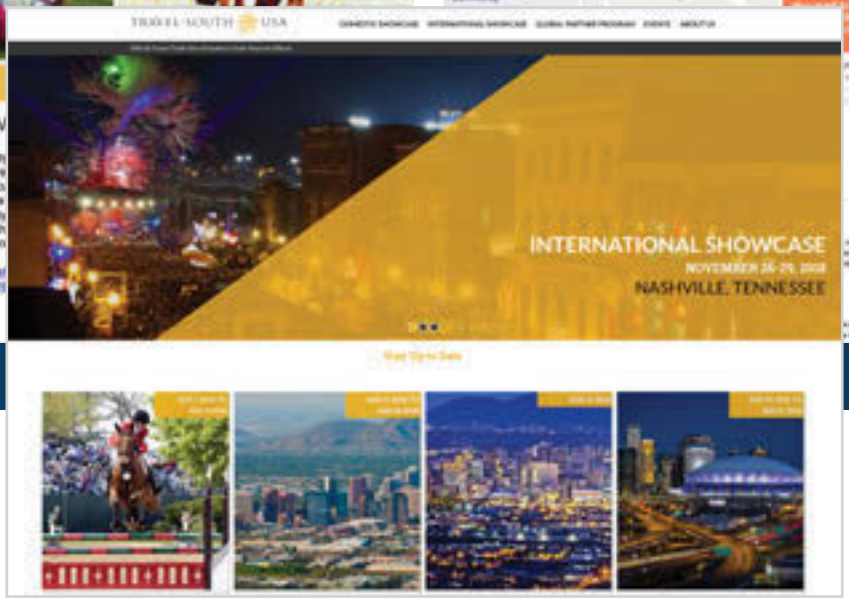
Industry Communication and Program Timeline

Web presence, e-news and social channels help keep us engaged and connected with our tourism partners in the South, as well as travel trade customers around the globe.

- www.Industry.TravelSouthUSA.com
- E-News
- Social Channels: Facebook, Twitter, YouTube *(Targeting Industry Partners)*

e-News

Facebook



www.Industry.TravelSouthUSA.com

2018-2019 Program of Work

(subject to change)

TRAVEL·SOUTH USA

DATES	EVENT	LOCATION	CAT	COUNTRY	PARTNER OPPORTUNITIES
2018 Travel South USA					
JULY 2018					
July	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
AUGUST 2018					
August	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
August 7	Travel South USA Board of Directors Meeting	Lexington, KY	Mtg		Board Only
August 8	U.S. Civil Rights Trail Mktg. Alliance Meeting	Lexington, KY	Mtg		Board Only
August 12	TSUSA Media & Adv. Committee Meeting	Phoenix, AZ	Mtg		Committee Only
SEPTEMBER 2018					
September	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
Sept 8-13	US. China Leadership Summit	Hangzhou, China	Mtg	CN	State Travel Director Invitation only
Sept 20	Discover America Sweden Workshops	Malmo, Sweden	Int'l	NU	Global Partner Program
Sept 22	Visit USA Workshop	Reggio Emilia Italy	Int'l	IT	Global Partner Program
Sept 22	Visit USA "America Day" - B2B Trade Event	Reggio Emilia Italy	Int'l	FR	Global Partner Program
Sept 25-28	IFTM Top Resa	Paris, France	Int'l	FR	Global Partner Program
OCTOBER 2018					
October	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
October	East West Training Travel Trade Seminar	Beijing	Int'l	CN	Global Partner Program
October	Training Seminar	Beijing	Int'l	CH	Global Partner Program
October	Meredith Time Inc- Roundtables	NYC, NY	Dom		UAC Buy-In
October	Brand USA- US Embassy Events	China	Int'l	CN	Global Partner Program
Oct 2-4	Road Shows - Visit USA The Netherlands	Zwolle, Amsterdam & Dem Bosch	Int'l	BEN	Global Partner Program
Oct 4 & 11	Visiteurs B2B Road Show	Bordeaux & Nice	Int'l	FR	Global Partner Program
Oct 23-29	American Airways Awards Program/FAM	KY & TN	Int'l	BR	Global Partner Program
NOVEMBER 2018					
November	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
November	Visit USA Road Shows	Lille, Strasburg, Paris	Int'l	FR	Global Partner Program
November	Media FAMs & VJP - Australia	LA & MS	Int'l	AU	
Nov 5-7	World Travel Market London	London, UK	Int'l	UK	Contact your State Tourism Office
Nov 8-11	Festuris Gramado - International Tourism Fair	Gramado, Brazil	Int'l	BR	Global Partner Program
Nov 26-29	7th International Showcase & Super FAM	Nashville, TN	Int'l		Online Registration
Nov 26	Travel South Board of Director Meeting	Nashville, TN	Mtg		Board Only
Nov 29-Dec 2	TSUSA Super FAM's	TN, AL, AR, KY & MS	Int'l		TSUSA International Showcase
DECEMBER 2018					
December	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
2019 Travel South USA					
JANUARY 2019					
January	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, NU	Global Partner Program
January	Vakantiebeurs Trade & Consumer Fair	Utrecht	Int'l	BEN	Global Partner Program
Jan 19	Visit USA "America Day" - B2B Trade Event	Molfetta	Int'l	FR	Global Partner Program
Jan 26-29	American Bus Association	Louisville, KY	Dom		Registration Required with ABA
Jan 24	Travel Match Trade Show	Oslo, Norway	Int'l	NU	Global Partner Program
Jan 31-Feb 3	Icelandair Mid Atlantic Show	Reykjavik, Iceland	Int'l	NU	Global Partner Program
FEBRUARY 2019					
February	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
Feb 3-6	IITA's Summit	Savannah, GA	Int'l		Registration Required with IITA
Feb 22-24	Danish Travel Show/Ferie for Alle	Herning, Denmark	Int'l	NU	Global Partner Program
Feb 21-24	Pre Operators FAM's	South Carolina	Dom		Online Registration
Feb 24-27	36th Annual Travel South Domestic Showcase	Myrtle Beach, SC	Dom		(Open to Partners)
Feb 24	Travel South USA Board of Directors Meeting	Myrtle Beach, SC	Mtg		Board Only
Feb 26	11th Annual Ultimate Ad Challenge	Myrtle Beach, SC	Mtg		Committee Only
Feb 27-Mar 2	Post Operators FAM's	NC & GA	Dom		TSUSA Showcase

2018-2019 Program of Work
(subject to change)

DATES	EVENT	LOCATION	CAT	COUNTRY	PARTNER OPPORTUNITIES
2019 Travel South USA					
MARCH 2019					
March	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
March	Discover America Sweden	Jonkoping, Sweden	Int'l	NU	Global Partner Program
March 2	Swanson's "America Day"	Osby, Sweden	Int'l	NU	Global Partner Program
March 2-5	Showcase USA - Italy	Bergamo	Int'l	IT	Global Partner Program
March 3	FDM Travel USA Event	Copenhagen, Denmark	Int'l	NU	Global Partner Program
March 4	Discover America Day	Copenhagen, Denmark	Int'l	NU	Global Partner Program
March 6-10	ITB Berlin	Berlin	Int'l	GE	Contact your State Tourism Office
March 8-10	Mahana Lyon Consumer Fair	Lyon	Int'l	FR	Global Partner Program
March 24-29	Delta Air Lines Award Program/FAM	TN	Int'l	BR	Global Partner Program
APRIL 2019					
April	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
April	East West Training Travel Trade Seminar	Shanghai	Int'l	CN	Global Partner Program
April	Training Seminar	Shanghai	Int'l	CH	Global Partner Program
April 2-4	WTM Latin America	Sao Paulo, Brazil	Int'l	BR	Registration Required
MAY 2019					
May	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
JUNE 2019					
June	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
June 1-5	IPW - Bringing America to the World	Anaheim, CA	Int'l		Contact your State Tourism Office
June 17-25	TSUSA International Sales Mission	Shanghai, Hangzhou & Beijing	Int'l	CH	Registration Required
June 2	IPW - TSUSA Int'l Committee Meeting	Anaheim, CA	Int'l		
JULY 2019					
July	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
AUGUST 2019					
August	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
SEPTEMBER 2019					
September	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
OCTOBER 2019					
October	Travel Trade Trainings		Int'l	AU, BEN, BR, CN, FR, IT, NU	Global Partner Program
NOVEMBER 2019					
November	Visit USA Road Shows	France	Int'l	FR	Global Partner Program
November	World Travel Market London	London, UK	Int'l	UK	Contact your State Tourism Office
DECEMBER 2019					
Dec 2-5	8th International Showcase & Super FAM (Open to Partners)	St Louis, MO	Int'l		Online Registration Contact your State Tourism Office
Dec 2	Travel South USA Board of Directors Meeting	St Louis, MO			
Dec 5-8	TSUSA Super FAM's	MO, AR, KY	Int'l		Contact your State Tourism Office

Global Partner
Programs

TRAVEL·SOUTH USA

Global Partners FY 18-19

	AUSTRALIA	BENELUX	BRAZIL	CHINA	FRANCE	ITALY	NORDIC UNION	UK*	GERMANY SWITZERLAND & AUSTRIA
STATE									
Alabama	●	●	●	●	●	●	●	●*	●**
Arkansas	●			●			●	●*	
Georgia	●		●	●	●			●*	●**
Kentucky	●	●	●	●	●	●	●	●*	●**
Louisiana	●	●	●	●	●+	●	●	●*	●**
Mississippi	●			●				●*	●**
Missouri	●						●	●*	●**
North Carolina		●		●	●	●	●	●*	●**
South Carolina		●		●	●	●	●	●*	●**
Tennessee	●	●	●	●	●	●		●*	●**
Virginia	Capitol Regions USA								
West Virginia		●		●			●		

* WTM London Participation
** ITB Participation
\+ Project Basis

Global Partner Program

The Global Partner Program is a shared advertising, marketing and sales program serving the need to grow and extend our global messaging into countries that state tourism offices would otherwise not have the resources to invest in alone. In a pay-to-play model, participating states utilize collective funds that are used to contract in-country representatives that provide year-round promotional efforts, execute marketing campaigns, aggressively seek earned media and work closely with on-going Brand USA efforts.

In-Country Strategy Summary • Top Markets Ranked by Spending

COUNTRY	RANKING 2017	TIER	MARKET STRATEGY	TSUSA POSITION	TACTICS
UNITED KINGDOM & IRELAND	#1 Overseas Market	Mature	Strengthen Individual State Investments	Support	• Travel Trade - WTM London • Recruitment for International Showcase • Brand USA Cooperative Advertising - B2C
GERMANY AUSTRIA SWITZERLAND	#2 Overseas Market	Mature	Strengthen Individual State Investments	Support	• Travel Trade - ITB Berlin • Recruitment for International Showcase • Brand USA Cooperative Advertising - B2C
CHINA	#3 Overseas Market	Growth	Investment and Leveraged partnerships in Earned/Owned/ Paid Media to Amplify Travel Trade PR/Social Media	Global Partner Opportunities	• Travel Trade - TSUSA Mission/ workshops/trainings/regional roadshows • Recruitment for International Showcase • Earned Media Programming • Social Media Channels • Brand USA Cooperative Advertising -B2C
NORDIC*	#6 Overseas Market	Emerging	TSUSA Development	Global Partner Opportunities	• B2B Recruitment of Operators for International Showcase • Travel Trade Workshops & Trainings
BRAZIL	#7 Overseas Market	Growth	Investment and Leveraged partnerships in Earned/Owned/ Paid Media to Amplify Travel Trade PR/Social Media	Global Partner Opportunities	• Travel Trade - workshops/ trainings, regional road shows • Recruitment International Showcase • Earned Media Programming • Social Media Channels • Brand USA Cooperative Advertising -B2C

**Nordic Countries (Norway, Sweden, Denmark, Finland & Iceland)*
India (#4 Overseas Market) & Japan (#5 Overseas Market) are not in the TSUSA global program of work for FY 18-19

Global Partner Program

In-Country Strategy Summary • Top Markets Ranked by Spending

COUNTRY	RANKING 2017	TIER	MARKET STRATEGY	TSUSA POSITION	TACTICS
AUSTRALIA	#9 Overseas Market	Growth	Investment and Leveraged partnerships in Earned/ Owned/Paid Media to Amplify Travel Trade PR/ Social Media	Global Partner Opportunities	• Travel Trade - TSUSA • Workshops/trainings • Recruitment for International Showcase • Earned Media Programming • Social Media Channels • Brand USA Cooperative Advertising -B2C
FRANCE	#10 Overseas Market	Growth	Investment and Leveraged partnerships in Earned/ Owned/Paid Media to Amplify Travel Trade PR/Social Media	Global Partner Opportunities	• Travel Trade - Mission/ workshops/trainings, regional road shows • Recruitment for International Showcase • Earned Media Programming • Social Media Channels • Brand USA Cooperative Advertising -B2C
ITALY	#11 Overseas Market	Growth	Investment and Leveraged partnerships in Earned/ Owned/Paid Media to Amplify Travel Trade PR/Social Media	Global Partner Opportunities	• Travel Trade - Mission/ workshops/trainings, regional road shows • Recruitment International Showcase • Earned Media Programming • Social Media Channels • Brand USA Cooperative Advertising -B2C
BENELUX**	#12 Overseas Market	Growth	Investment and Leveraged partnerships in Earned/ Owned/Paid Media to Amplify Travel Trade PR/Social Media	Global Partner Opportunities	• Travel Trade - workshops/ trainings, regional road shows • Recruitment for International Showcase • Earned Media Programming • Social Media Channels • Brand USA Cooperative Advertising -B2C

*** Benelux Countries (Belgium, Netherlands & Luxembourg)*
Republic of Korea (#8 Overseas Market) is not in the TSUSA global program of work for FY 18-19

AUSTRALIA MARKET OVERVIEW

Australia Inbound Tourism Snapshot

The U.S. is holding steady as the number one long-haul international destination for Australians, with an incredible return rate of 73%. In addition to this, accessibility to the Southern States has never been easier with the continued capacity offered by Qantas' flights into Dallas Fort Worth, Air New Zealand's flights into Houston via Auckland; as well as the recent launch of United Airline's non-stop flights from Sydney to Houston, enabling travellers to explore to and through the Southern states.

Unemployment remains low (5.6%) as does inflation (1.9%) with the economy continuing to show signs of growth. Australia has a small population of 24.7 million, but 6.8 million of those take overseas trips.

Annual visitation to the United States currently sits at 1.35million, representing almost 5.5% of the population. Australia remains in the top 10 markets for visitation to the United States and is ranked 8th top market for spend.

Australians travel all year round to the U.S., however the most popular months are between April – September. According to the Brand USA Market profile, the top five (5) motivators for Aussies choosing long-haul destinations are cultural/historical attractions, local lifestyle, shopping, dining/gastronomy, and visiting friends/relatives. They view the USA as adventurous, diverse, friendly and energetic.

Highlighting the following will be key: semi-free experiences (outdoors/ national parks, museums, sightseeing, small towns, etc.) as well as special interests (music, culture, sport and history) and road trips (with 37% Aussies renting a car). Value packaging and working with the travel trade are essential to attract visitors.

In Market Representatives

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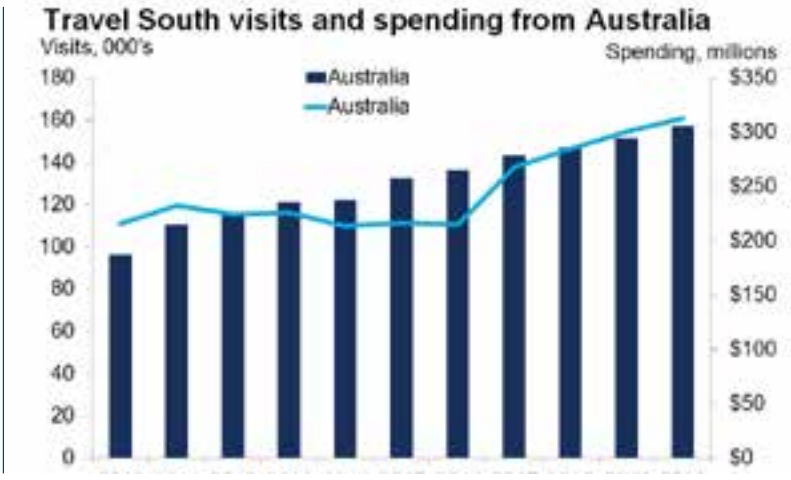
Research



Marketing & Sales Activities

Travel South USA has a year-round investment in research, travel trade strategies, along with earned, owned and paid media to amplify our efforts in-market. Commissioned research, along with monthly trend reports and a comprehensive tour operator analysis, is provided to state tourism offices participating in the Global Partner Program. Travel Trade strategies and tactics include sales missions, trade shows, workshops/training regional road shows, cooperative event marketing with Brand USA and recruitment of tour operators buyers to International Showcase & Super FAMs. Earned, owned and paid media strategies and tactics include hosting visiting journalists, FAMs, social media campaigns, and cooperative advertising efforts B2C.

Research
Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media	
TravelSouth.visittheusa.com/en-au	Year-Round
Distribution of Travel South USA Inspiration Guides - Reprints - Queens English *Produced by Brand USA/Miles Partnership*	Year-Round
Social Media Campaigns *Executed by Sparkloft*	Year-Round
Pitch Story Ideas to Media Targets	Year-Round
Host Visiting Journalist & FAM Tours	On Approval
Ongoing Media Calls	Year-Round

Travel Trade		
Ongoing Operator Trainings		Year-Round
Negotiation and Management of Co-Ops Campaigns		Year-Round
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

BENELUX MARKET OVERVIEW

Benelux Inbound Tourism Snapshot - *GROWTH Market*

The USA is the #1 long haul destination for the Benelux market; 3 out of every 100 citizens visit the USA. In the Benelux region, traveling is not only a passion for a lot of inhabitants, but vacation is considered a right rather than a privilege. 81% of the population go on vacation at least once a year. In Belgium, The Netherlands and Luxembourg, employed staff receives "vacation money," some 8% of their annual gross income between May 1 and June 30 to subsidize summer holidays. Additionally, everyone receives 25 vacation days and an average of 9 Bank Holidays per year. Average amount of days spent on an intercontinental vacation is 18 days.

In Market Representatives

Target Travel Marketing

Target Travel Marketing is a full-service destination marketing and public relations company with headquarters based in the Netherlands and a subsidiary in Belgium. With over 25 years of experience in the Belgian, Dutch and Luxembourg markets, Managing Director Arjan Helle and his team of multi-lingual market experts assist destinations in the creation and/or implementation of sales, marketing and public relations efforts directed to this vital overseas market.

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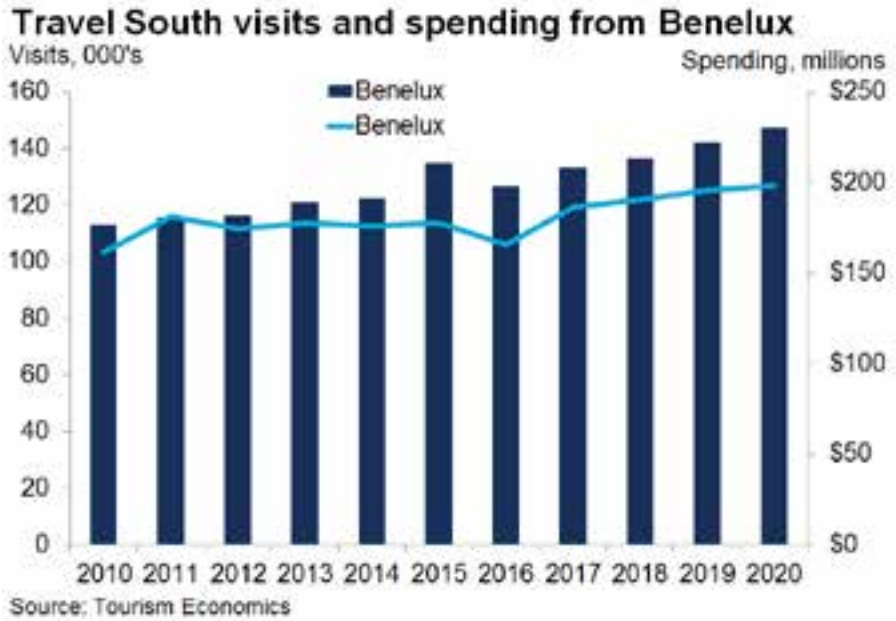
Research



Marketing & Sales Activities

Travel South USA has a year-round investment in travel trade strategies along with earned, owned and paid media to amplify our efforts in-market. We commission research along with monthly trend reports and a comprehensive tour operator analysis that is provided to state tourism offices participating in the Global Partner Program. Travel trade strategies include sales missions, trade shows, workshops/regional training road shows, cooperative event marketing with Brand USA and recruitment of top-notch tour operators to the Travel South USA International Showcase & Super FAM Tours. Earned, owned, and paid media strategies and tactics include hosting visiting journalists, FAM Tours, social media campaigns, and cooperative advertising efforts B2C.

Research
Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media	
Dedicated Content on RonReizen	Year-Round
Press Releases	Monthly
Distribution of Travel South USA Inspiration Guides - Reprints - Queens English • *Produced by Brand USA / Miles Partnership*	Year-Round
Social Media Campaigns • *Executed by Sparkloft*	Year-Round
Host Visiting Journalist & FAM Tours	On Approval

Travel Trade		
Visit USA Netherlands & Belgium Membership		
Ongoing Operator Trainings		Year-Round
Negotiation and Management of Co-Ops Campaigns		Year-Round
Trade Workshop Around the World	Rotterdam, Netherlands	TBD
Road Shows -Visit USA The Netherlands	Zwolle, Amsterdam & Dem Bosch	October 2-4, 2018
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
Vakantiebeurs Trade & Consumer Fair	Utrecht, Netherlands	January 8-13, 2019
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

BRAZIL MARKET OVERVIEW

Brazil Inbound Tourism Snapshot - *GROWTH Market*

Brazil's economic recovery appears to be on track after economic growth accelerated in the final quarter of 2017. Lowered inflation, accommodating federal monetary policy and rebounds in investments has caused business and consumer confidence to reach multi year highs. According to available indicators, the positive economic momentum has carried forward into 2018 which has resulted in business confidence to move into the "optimistic territory" for the first time since 2013.

There are eight Brazilian airlines and thirty-four foreign airlines operating in Brazil. International airlines are once again planning to increase capacity by either and increase in total number of flights or larger aircrafts, which can accommodate more travelers per flight.

Brazilians have continued to represent a large market share of social media users across the globe. Brazil represents the third most active users per country on Facebook and Instagram. On average, Brazilians spend four hours a day on social platforms.

In Market Representatives

Operating out of São Paulo, Brazil, the largest financial and commercial center of South America, River Global provides all the necessary information, expertise and support needed by its clients to expand or establish their businesses in South America, providing customized solutions to meet government trade and marketing promotion agencies and organization's specific needs.

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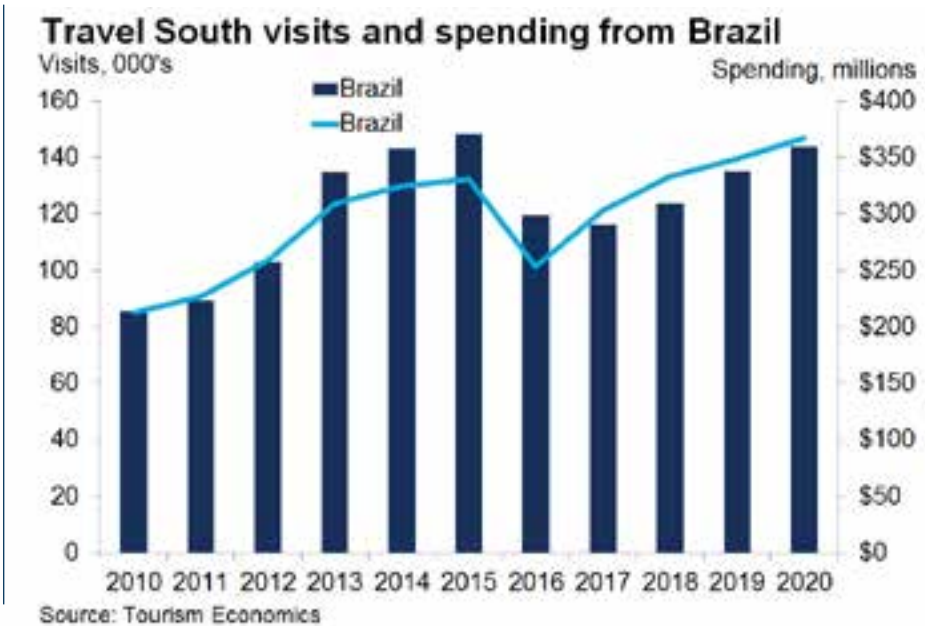
Research



Marketing & Sales Activities

Travel South USA has a year-round investment in research, travel trade strategies, along with earned, owned and paid media to amplify our efforts in-market. Commissioned research, along with monthly trend reports and a comprehensive tour operator analysis, is provided to state tourism offices participating in the Global Partner Program. Travel Trade strategies and tactics include sales missions, trade shows, workshops/training regional road shows, cooperative event marketing with Brand USA and recruitment of tour operators' buyers to International Showcase & Super FAMs. Earned, Owned and Paid Media strategies and tactics include hosting visiting journalists, FAMs, social media campaigns, and cooperative advertising efforts B2C.

Research
Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media	
TravelSouth.visittheusa.com/pt-br	Year-Round
2x Monthly Press Releases & E-Newsletter	Year-Round
Distribution of Travel South USA Inspiration Guides - Reprints - Portuguese • *Produced by Brand USA / Miles Partnership*	Year-Round
Social Media Campaigns • *Executed by Sparkloft*	Year-Round
Host Visiting Journalist & FAM Tours	On Approval
Ongoing Media Calls	Year-Round

Travel Trade		
Monthy Trade E-Newsletters		Year-Round
Ongoing Operator Trainings		Year-Round
Ongoing Salls Calls		Year-Round
Brand USA Discovery Training Program		Year-Round
Negotiation and Management of Co-Ops Campaigns		Year-Round
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
American Airways Awards Program		October 23-29, 2018
Festuris Gramado - International Tourism Fair	Gramado, Brazil	November 8-11, 2018
Delta Air Lines Award Program		March 24-29, 2019
WTM Latin America	Sao Paulo, Brazil	April 2-4, 2019
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

CHINA MARKET OVERVIEW

China Inbound Tourism Snapshot - *GROWTH Market*

The FIT market is booming year over year compared to the group tour market in China. The market went from a 70% group tour / 30% FIT ratio in 2016 to a 42% group tour/ 58% FIT ration in 2017.

Chinese travel behaviors have drastically changed over the last decade as most outbound travelers are in their late 20s and 30s. Specifically, language barriers are becoming less or an obstacle due to an increase in fluent English-speaking Chinese travelers. In addition, Chinese consumers travel motivations have shifted from being primarily focused on shopping to being exploratory and interested in "experiencing" the destination offerings which has created a demand for customized products and itineraries.

In Market Representatives

East West Marketing Corporation is a full-service representation company with nearly eighteen years of experience promoting in-bound tourism to the U.S. from the Chinese market. East West has established an extensive network with industry partners both in the U.S. and China, offering strategy and consulting for market entry, trade relationships, trainings and seminars as well as media and advertising support.

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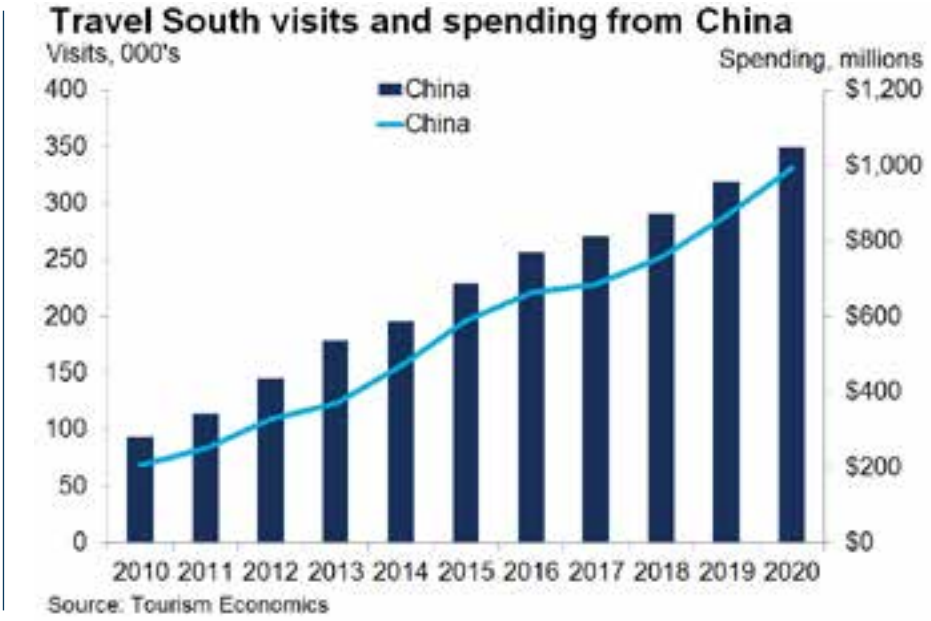
Research



Marketing & Sales Activities

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Research
Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media	
GoUSA.cn/Travel South GoUSA.tw/Travel South	Year-Round
Distribution of Travel South USA Inspiration Guides - Reprints - Chinese • *Produced by Brand USA / Miles Partnership*	Year-Round
WeChat Content Marketing	Year-Round
6x Press Releases	Year-Round
KOL/Influencer Campaigns/FAMs	On Approval

Travel Trade		
Ongoing Operator Trainings & Sales Calls		Monthly
Negotiation and Management of Co-Ops Campaigns		Year-Round
Brand USA Roadshows		On-Going
U.S. China Tourism Leadership Summit	Hangzhou, China	September 9-12, 2018
Training Seminar	Beijing, China Shanghai, China	October 2018 April 2019
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
TSUSA Sales Mission	Shanghai, Hangzhou & Beijing	June 17-25, 2019
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

FRANCE MARKET OVERVIEW

France has a long-lasting friendship with the United States, and French travelers are repeaters who will explore several regions of the country during their lifetime to discover out of the beaten path destinations. They are especially attracted to the South for its connection to French history, music (jazz, blues, soul, gospel, rock'n'roll…), authentic local food, historic Plantations, and the typically Southern hospitality.

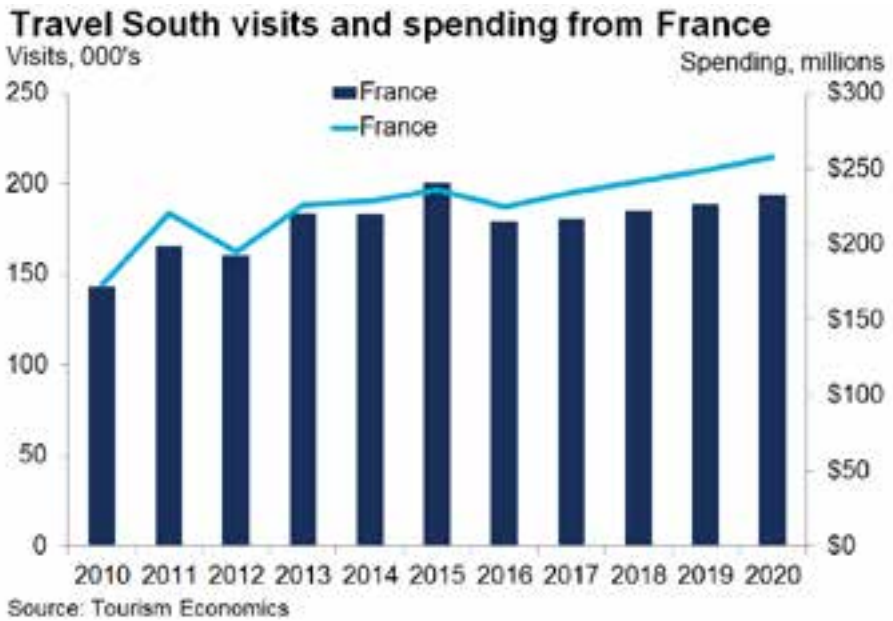
With direct flights from Paris to ATL, CVG and RDU, along with easy one - stop connection, the South has multiple gateways for French travelers. France is the 3rd largest market for the region in Europe and the forecast is good for continued growth. Tour operators are building more and more tailor made products for their clients, who are interested in Authentic destinations like the South.

France Inbound Tourism Snapshot - *Growth Market*

France's population is 67.2 million and is the second most populated country in the EU, with a GDP of 2,57 trillion US$ (+2% in 2017). France is the 5th largest international industrialized economy and the 2nd largest European (EU) industrialized economy. French employees enjoy 6 to 9 weeks of paid holidays per annum and an additional 11 public bank holidays per year. Paris, the capital of France, is the largest city with 12.4 million inhabitants, followed closely by Marseille, Lyon, Toulouse and Nice.

- The vacation departure rate in 2017 has reached 64%, with a departure abroad at a record of 38% in 2017 (+4 points VS 2016) .
- The USA is still the number 1 long-haul destination for French travelers: 22% of French travelers wanted to do a road-trip in the USA in 2018.
- The US department of commerce forecasts 1.78M of French visitors in the US in 2018 with an expected continuing growth for the 5 years to come.
- 76% of the French travelers are repeaters.

Research



In Market Representatives

Express Conseil

Express Conseil is a travel promotion specialist, assisting international clients in developing communication strategy in the French speaking markets of Europe. With more than 35 years of experience, Express Conseil provides strategic communication and PR positioning, trade show strategy, media campaigns, and press conferences.

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Marketing & Sales Activities

Travel South USA has a year-round investment in travel trade strategies along with earned, owned and paid media to amplify our efforts in-market, including travel trade workshops/training regional road shows, recruitment of tour operators buyers to International Showcase, social media campaigns, cooperative event marketing with Brand USA and cooperative advertising efforts B2C.

Research

Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media

TravelSouth.visittheusa.com/fr-fr www.Office-Tourisme-USA.com	Year-Round
Distribution of Travel South USA Inspiration Guides - Reprints - French • *Produced by Brand USA / Miles Partnership*	Year-Round
Social Media Campaigns • *Executed by Sparkloft*	Year-Round
Pitch Story Ideas to Media Targets	Year-Round
Host Visiting Journalist & FAM Tours	On Approval
E-Newsletter - PR	Quarterly
Ongoing Media Calls	Year-Round

Travel Trade

Visit USA France Membership		
E-Newsletter - Trade		Quarterly
Visit USA E-Learning V6		Year-Round
Ongoing Operator Trainings		Year-Round
Negotiation and Management of Co-Ops Campaigns		Year-Round
IFTM Top Resa	Paris, France	September 25-28, 2018
Visiteurs B2B Road Show	Bordeaux & Nice	October 4th & 11th, 2018
Visit USA Workshops	Lille, Strasburg & Paris	November 2018
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
Mahana Lyon Consumer Fair	Lyon, France	March 8-10, 2019
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

ITALY MARKET OVERVIEW

ITALY Inbound Tourism Snapshot - *Growth Market*

For Travel South USA, there is no such thing as an accidental tourist from Italy. It takes deliberate planning to visit the southern region, compelled by curiosity and the promise of what's unique and different in the American culture, history, lifestyle, nature, and innovative culinary scene. The Italian market has long-term potential and high spend per visitor and the U.S. remains the #1 long-haul travel destination for Italians.

The Italian travel industry landscape is mainly dominated by small-to-medium companies. A significant number of them are family-owned and run. Very often they focus on consumers in a specific geographic region and, in some cases, are market leaders on a global scale. There are approximately 80 tour operator companies who feature U.S. product and 6,000 travel agencies/retailers based in Italy.

The southern U.S. remains very popular for Italian tour operators looking to create product and market aggressively to their customer base of well-heeled travelers.

In Market Representatives

Thema Srl - Thema New Worlds Ltd. is a company founded in Milan, Italy in 1987 and operates throughout the Italian territory in the tourism sector offering services in marketing, sales, media relations, and PR. Thema Srl works with agencies associated with the development of strategic marketing, public relations, and communications programs. Holders of Thema Srl: Dr. Maria Olga Mazzoni and Mario Boveri.

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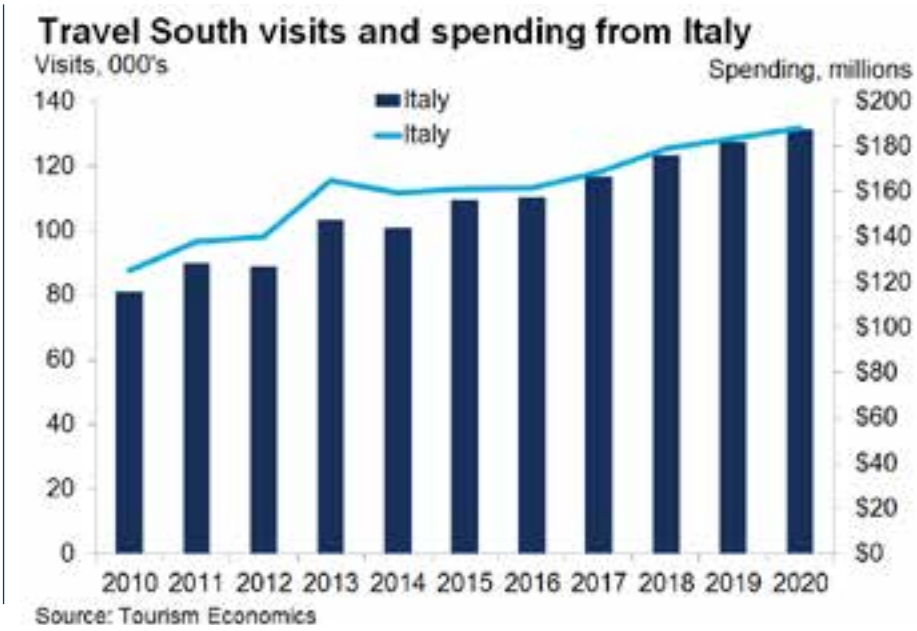
Milano, Italy
Tel: (+39) 0233108541
Fax: (+39) 0233105827
Email: travelsouthusa@themasrl.it
Web: www.travelsouthusa.com

Dr. Olga Mazzoni, *Managing Director*
Mr. Mario Boveri, *Operations Manager*
Ms. Barbara Barili, *Trade & Media Coordinator*

Research



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Earned, owned, and paid media strategies and tactics include hosting visiting journalists, FAM Tours, social media campaigns, and cooperative advertising efforts B2C.

Research
Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media	
www.visitusaita.org	Year-Round
Distribution of Travel South USA Inspiration Guides - Reprints - Italian • *Produced by Brand USA / Miles Partnership*	Year-Round
Social Media Campaigns • *Executed by Sparkloft*	Year-Round
E-Newsletter - PR	Quarterly
Host Visiting Journalist & FAM Tours	On Approval

Travel Trade		
Visit USA Italy Membership		
E-Newsletter - PR		Quarterly
Ongoing Operator Trainings		Year-Round
Negotiation and Management of Co-Ops Campaigns		Year-Round
Visit USA "American Day" - B2B Trade Event	Reggio Emilia, Italy Molfetta, Italy	September 22, 2018 January 19, 2019
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
International Showcase & Super FAMs	Nashville, TN & Region	November 26-29, 2018
Showcase USA-Italy	Bergamo, Italy	March 2-5, 2019
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

NORDIC UNION MARKET OVERVIEW

Nordic Union Inbound Tourism Snapshot

The USA remains the top long haul destination for Scandinavians and retaining is seventh ranking as most popular overall. Thailand, the other key long haul destination has slipped to 12th from 10th.

Living in more northerly latitudes, Scandinavians love the sun and 25% of them cite this as their main reason for an overseas vacation. Culture, music sport or an event trip is cited by 19% of overseas travellers and 7% for 'active trips' (hike, golf, bike etc.).

Nordic travelers have a large amount of vacation time (6 weeks paid, 11 National Holidays) and like to take a longer (than average European) vacations. They have significant disposable income with an average almost reaching $60,000 per year.

In Market Representatives

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Director of Trade & PR
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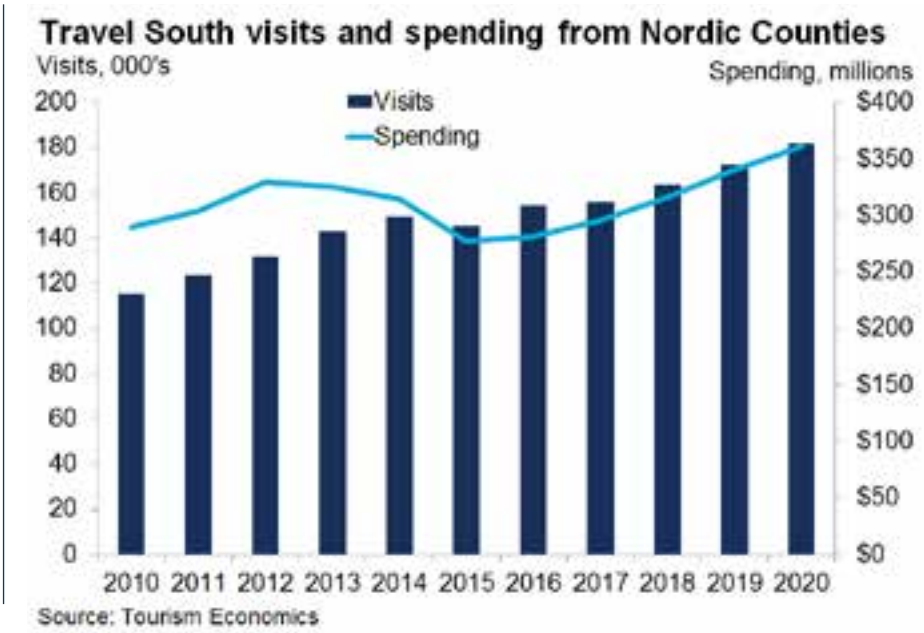
Research



Marketing & Sales Activities

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Research
Monthly Reporting
Tour Operator Brochure Analysis
Tourism Economics Commissioned Studies

Earned, Owned, & Paid Media	
TravelSouth.visittheusa.com/sv-se	Year-Round
Distribution of Travel South USA Inspiration Guides - Reprints - Queens English • *Produced by Brand USA / Miles Partnership*	Year-Round

Travel Trade		
Ongoing Operator Trainings		Year-Round
Negotiation and Management of 3x Co-Ops Campaigns		Year-Round
Product Offering Enhancement with Top Operators		Year-Round
International Showcase & Super FAMs	Nashville, TN & Region	Nov. 26-29, 2018
Discover America Sweden Workshops	Malmo, Sweden	September 20, 2018
Icelandair Mid-Atlantic Travel Show	Reykjavik, Iceland	Jan 31- Feb 3, 2019
Travel Match Trade Show	Olso, Norway	January 24, 2019
Discover America Day	Copenhagen, Denmark	March 4, 2019
International Showcase & Super FAMs	St. Louis, MO & Region	December 2-5, 2019

Consumer		
Danish Travel Show/Ferie for Alle	Herning, Denmark	February 22-24, 2019
Swanson's "America' Day"	Osby, Sweden	March 2, 2018
FDM Travel USA Event	Copenhagen, Denmark	March 3, 2019

Key Performance Indicators

TRAVEL SOUTH USA

Key Performance Indicators

Travel South USA's Global Marketing Plan details key objectives and priorities to guide the program of work for FY 18/19. The strategies, objectives and key performance indicators are directed by research and shifts in global market forces.

The core objectives are to:

1. **Lead an active and engaged Board of Directors,** state tourism office staff, partners, and strategic alliances that leverages resources to capture more visitors, spending more money and staying longer in the Travel South USA Region
2. **Increase Reach** by 10% the collaborative integrated marketing, cooperative advertising programs, travel trade outreach and earned media in the domestic and global marketplace
3. **Grow Awareness** by 10% through value driven partnership marketing, advertising, sales and public relations activities targeting travel trade, media and consumer outreach
4. **Amplify Engagement** using collaborative event marketing to deliver added value to partners and travel trade

Global Marketing

Objectives/Strategy/Key Performance Indicators

Objective 1

Lead an active and engaged Board of Directors, state tourism office staff, partners, and strategic alliances that leverages resources to capture more visitors, spending more money and staying longer in the Travel South USA Region

Strategy	Resources	KPI's
A Provide high quality research, both commissioned and industry intelligence, that is relevant, useful, and provides insight that helps to guide marketing strategy and/or influence the organization's/states' plans.	Vendors - Tourism Economics, American Bus Association Foundation	Financial Partner satisfaction
B Extend reach thru the completion of the marketing and promotional activities outlined in the Program of Work for FY18/19.	Vendors - Multiple	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
C Take our marketing intelligence, reporting, and dashboards to the next level with a integrated reporting platforms for International State Tourism Dashboard, Boardpaq.com, Coveragebook.com and TSUSA International Dashboard.	Vendor - Miles	Financial Partner Satisfaction

Continued

Global Marketing

Objectives/Strategy/Key Performance Indicators

Strategy	Resources	KPI's
D Communicate Travel South USA's activities, opportunities and results using **TravelSouthUSA.org**, **Boardpaq.com**, **CoverageBook.com** and quarterly **E-Newsletters**, along with published documents.	Vendors - LRC, Tourism Skills Group, Doubletake Creative Publishing	Financial Partner Satisfaction
E Extend Domestic Earned Media to exceed 110 million readership/impressions through a management partnership with LRC Communications & state PR efforts.	Vendors - LRC	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
F With the utmost respect for the public and private monies, direct, manage, and actively provide the highest standards of financial, non-profit corporation compliance, and state tourism membership benefits and meetings.	Vendors - Johnson & Johnson CPA	Financial Partner Satisfaction

Objective 2

Increase Reach by 10% the collaborative integrated marketing, cooperative advertising programs, travel trade outreach and earned media in the domestic and global marketplace

Strategy	Resources	KPI's
G Deliver world-class cooperative advertising offers to the state tourism offices thru the Ultimate Advertising Challenge.	Darienne Mobley, Inc	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
H Extend the reach and voice of the southern International messaging by 10% in our Digital Marketing through a managed partnership with Brand USA & Miles Media. Identify, measure, and improve the metrics that leverage the most effective, and most cost-efficient way to market the region to millions of potential visitors using the limited marketing dollars to drive awareness on VisittheUSA.com/TravelSouth, GoUSA.cn/travelsouth, GoUSA.tw/travelsouth and the hundreds of pages of State/Partner linked rich media content.	Vendors - Brand USA/Miles	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback

Global Marketing

Objectives/Strategy/Key Performance Indicators

Objective 3

Grow Awareness by 10% through value driven partnership marketing, advertising, sales and public relations activities targeting travel trade, media and consumer outreach

Strategy	Resources	KPI's
I Actively partner and lead partners to participate in Brand USA co-op opportunities.	Vendors - Brand USA/ Miles	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
J Direct the Global Partnership Programming for expanded representation services and collaborative marketing efforts in Australia, Benelux, Brazil, China, Italy, France, and Nordic Union with special projects and UK.	Vendors - Multiple	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
a *Execute the Program of Work in Australia, meet expectations for strong marketing, advertising and event ROI's and focus on good satisfaction scores from GPP state participants.*	Gate 7	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
b *Execute the Program of Work in Benelux countries - Belgium, The Netherlands, Luxembourg meet expectations for strong marketing, advertising and event ROI's and focus on good satisfaction scores from GPP state participants*	Target Travel Marketing	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
c *Execute the Program of Work in Brazil to meet expectations for productive marketing, advertising and earned media, ROI metrics and good satisfaction scores from GPP state participants*	River Global	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
d *Organize integrated sales and marketing strategies in China for states and partners to participate on a pay-to-play basis.*	East West Marketing Corp	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
e *Execute the Program of Work in France, meet expectations for strong marketing, advertising, and event ROI's and focus on good satisfaction scores from GPP state participants*	Express Conseil	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
f *Execute the Program of Work in the Nordic Union, meet expectations for strong marketing, advertising, and event ROI's and focus on good satisfaction scores from GPP state participants.*	Thema Nuovi Mondi, Srl	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
g *Execute the Program of Work in the Nordic Union, meet expectations for strong marketing, advertising, and event ROI's and focus on good satisfaction scores from GPP state participants.*	Five Marketing Solutions Ltd.	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
h *Organize in the United Kingdom/Ireland a unified regional presence at WTM London for the South to increase destination awareness and provide opportunities to showcase the "Taste & Tunes of the South".*	Brand USA/Bfor	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback

Global Marketing

Objectives/Strategy/Key Performance Indicators

Objective 4

Amplify Engagement using collaborative event marketing to deliver added value to partners and travel trade

Strategy	Resources	KPI's
K Produce the 7th Annual Travel South International Showcase in Nashville, TN which includes extensive digital presence with online registration software, brochures, FAM flyers, e-newsletters, industry training opportunities, and news releases focused on driving attendance and quality programming	Vendors - M2Onstage, Doubletake Creative Publishing, Terrapin Blue	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
a *Aggressively recruit to deliver a minimum of 1:1 supplier to buyer ratio of attendees at International Showcase and high quality buyers on post-FAMs Goals are 125 Buyers and 120+ Partner PODS*		
b *Guarantee a minimum of 25 pre-scheduled appointments for suppliers to meet and transact business with international wholesalers/tour operators & receptive tour operators*		
L Produce the 37th Annual Travel South Domestic Showcase in Myrtle Beach, SC which includes extensive digital presence with online registration software, postcards, hand-written notes, e-newsletters, and industry news releases focused on driving attendance and quality programming.	Vendors - M2Onstage, Doubletake Creative Publishing, Terrapin Blue	Financial Marketing Effectiveness Partner Satisfaction Customer Feedback
a *Aggressively recruit to deliver a minimum of 1:1.7 suppliers to buyer ratio of attendees at Showcase Goal is 125-tour operator buyers and approximately 200 Supplier booths total.*		
b *Guarantee a minimum of 25 pre-scheduled appointments for suppliers to meet and transact business with North American tour operators and maintain overall satisfaction ratings 4.0 or better for all segments of participants attending.*		
c *Enhance Journalist program to increase the number of high quality journalists attending showcase and offer partners as well as the state tourism offices appointments and execute a world-class hosted journalist program.*		

TOGETHER
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STRONGER

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Kentucky
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TNVACATION.COM

VIRGINIA IS FOR LOVERS

WEST VIRGINIA

TRAVEL·SOUTH USA

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