

Pennsylvania
pursue your happiness™

INTERNATIONAL TOURISM MARKETING

October 13, 2016





Snapshot

- A brief history
- New strategy
- U.K./Ireland Sales & Public Relations Mission
- IPW Trade Show
- Visit USA UK
- Brand USA
- What's next
- How can we help?

A brief history

- 2004 - 2011 – In-country representation in five countries: U.K. , France, Spain, Italy, Germany. Total investment: \$7.8 million
- 2011 - 2013 – Limited in-country representation in China.
- Between 2000 and 2008, the number of overseas visitors to Pennsylvania grew 56% vs. a 2% decline for the U.S.
- The situation flipped between 2008 and 2015 with Pennsylvania registering a 1.5% increase compared to a 51.5% increase for the U.S.

INTERNATIONAL

33% DECLINE in PA Market Share
of Overseas Visitors to the U.S. (2008-2015)

Estimated **\$3.1 BILLION LOSS** in Visitor Spending

Growth in Overseas Visitation, 2008-2015



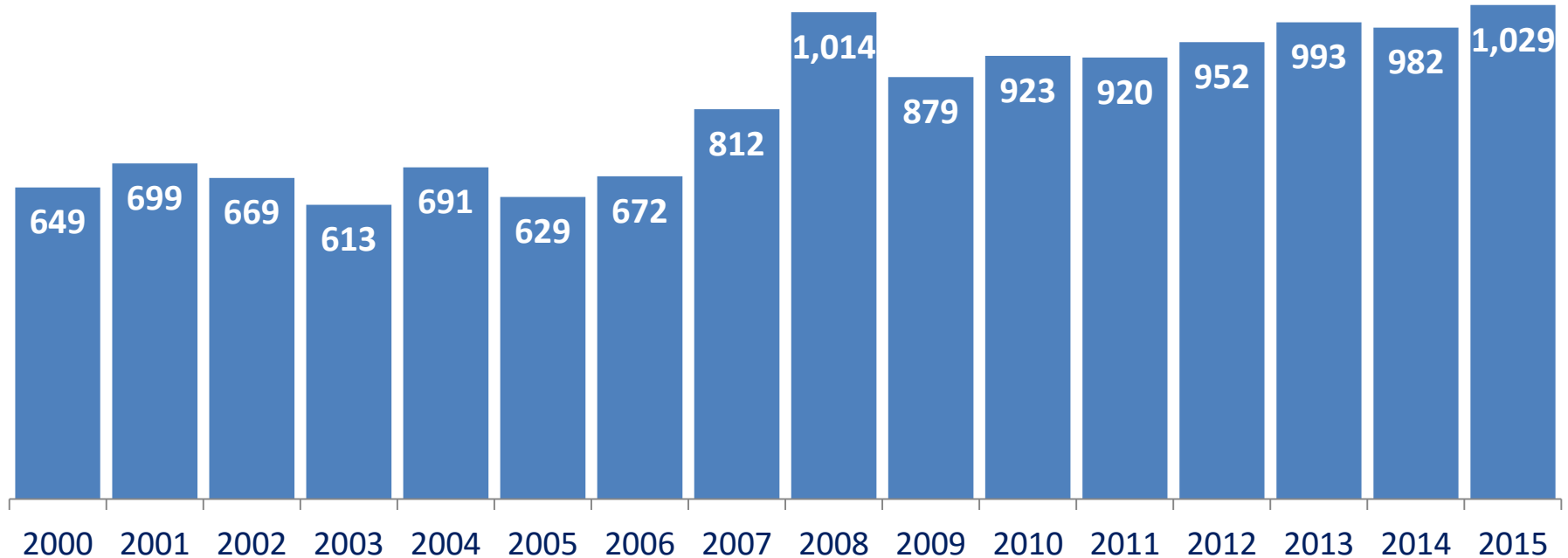
U.S.
51.5%



PA
1.5%

Pennsylvania hosts roughly 1 million visitors annually from overseas markets – a number that has held relatively steady since 2008.

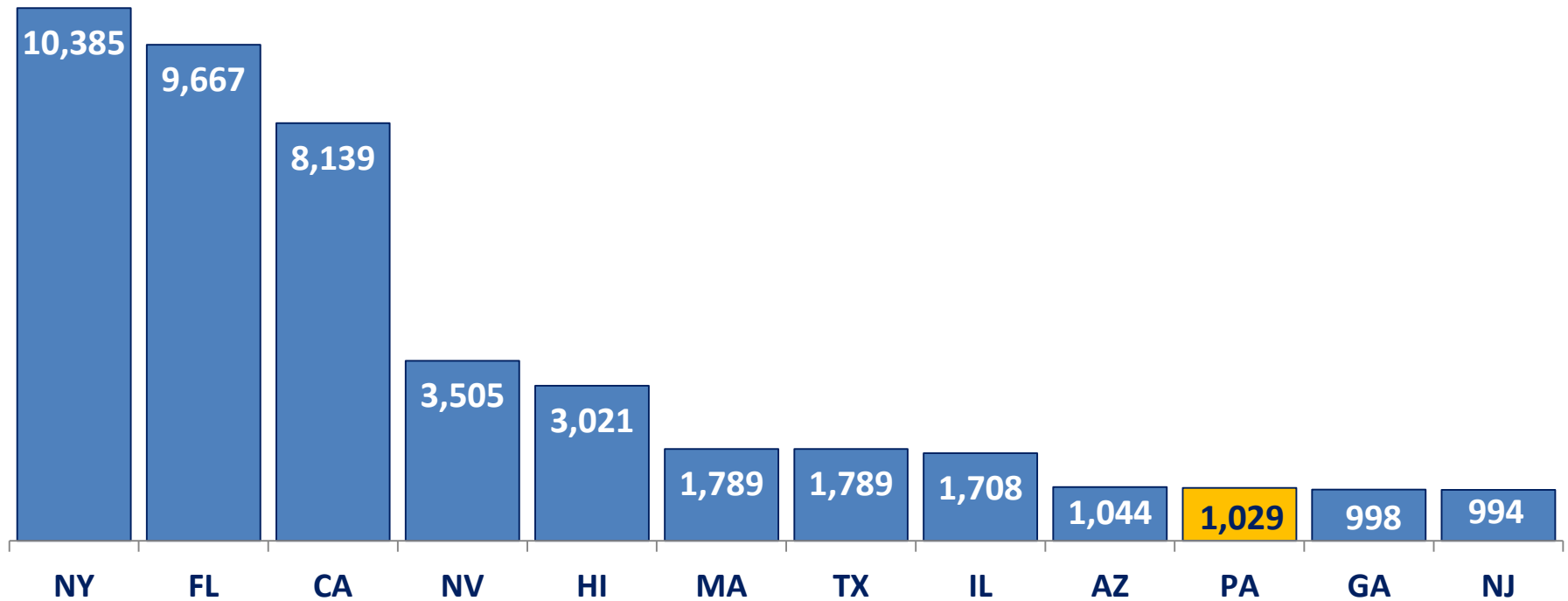
Pennsylvania Overseas Visitor Volume (in 000s)



Source: U.S. Department of Commerce, National Travel and Tourism Office

Pennsylvania was the 10th most popular U.S. destination state for overseas travelers in 2015 with a 2.7% market share.

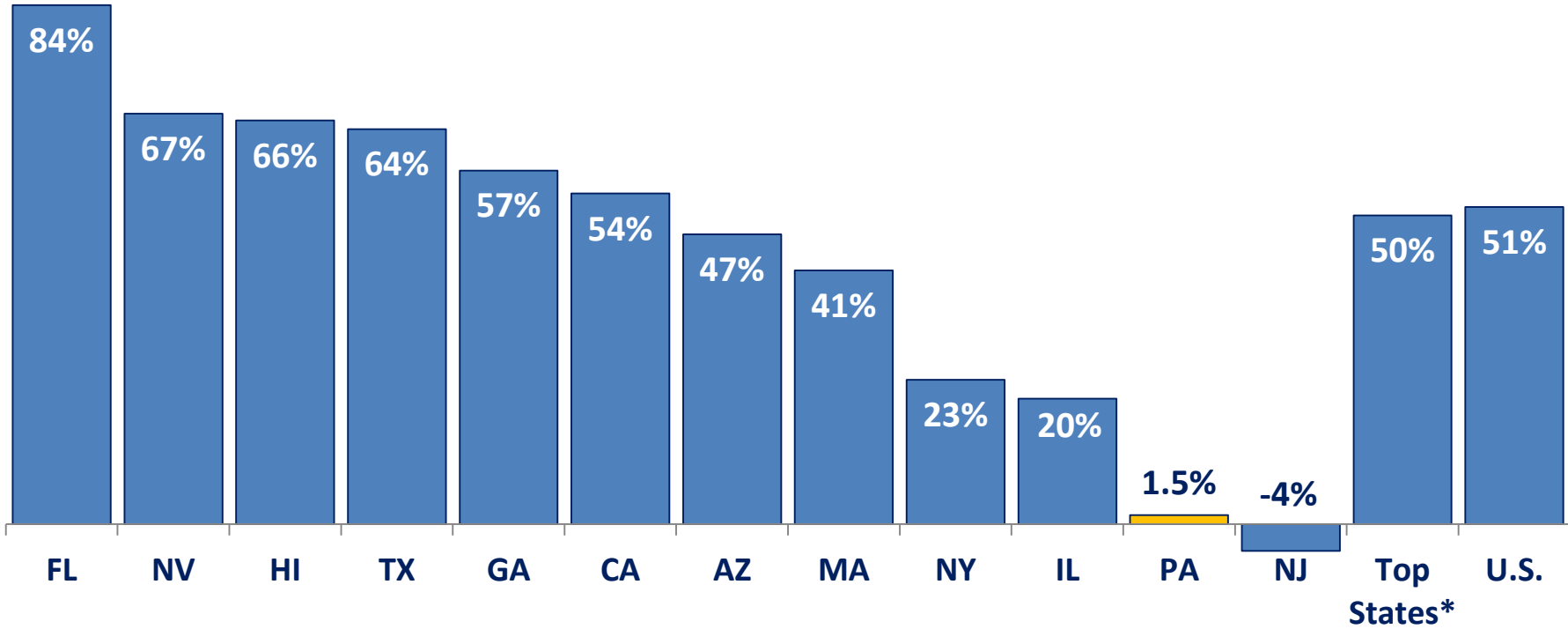
2015 Overseas Visitor Volume (in 000s)



Source: U.S. Department of Commerce, National Travel and Tourism Office

Pennsylvania's growth rate in overseas visitors from 2008 to 2015 was well below the rate for most of the top destination states for overseas travelers.

Percent Change in Overseas Visitor Volume, 2008 - 2015



*Excluding PA & NJ

Source: Based on data from U.S. Department of Commerce, National Travel and Tourism Office



New Approach
Targeted Investments,
Limited \$\$\$

Resources

- New American Development Fund
- CAN DO approach

New American Development Fund – Congress created the EB-5 Program in 1990 to stimulate the U.S. economy through job creation and capital investment by foreign investors. In 1992, Congress created the Immigrant Investor Program, also known as the Regional Center Program. This sets aside EB-5 visas for participants who invest in commercial enterprises associated with Regional Centers.

CAN DO approach – Hazleton story



U.K. & Ireland Sales and Public Relations Mission, May 8-15

- Greg Evans Consultancy
- 6 DMO partners
- 250 contacts
- London/Glasgow/Ireland
- Sponsorship from American Airlines
- 3 signature events with prizes provided by DMOs, American Airlines, Delta Airlines, and British Airways

The collage features the Pennsylvania & American Airlines logo at the top left, with logos for American Airlines, British Airways, and Delta. Below it is a photo of a Hard Rock Cafe London storefront. To the right is a photo of a bar area. Below the bar photo is a photo of a dining room with tables set for a dinner event.

Event 1:
Request the pleasure of your company for Dinner
on Friday 13th May
The Polo Room at O
5-6 Molesworth Place, Schoolhouse
Time: 12.30 for 13.00 |
RSVP to: Greg Evans
Email: rsvp_sec@btint.com
Tel: +44 7768 341790

Event 2:
Request the pleasure of your company for Dinner
On Thursday 12th May 2016 at
Halo @ The Morrison Hotel, Lower Ormond Quay, Dublin 1
Time: 1900 for Pre-Dinner drinks 1930 Dinner
Dress: Business Attire
RSVP to: Greg Evans
Email: rsvp_sec@btinternet.com
Tel: +44 7768 341790

U.K. & Ireland Sales and Public Relations Mission, May 8-15

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Participants: UK & Ireland sales mission 2016



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IPW, June 19-23

- 6000 attendees
- 500 travel writers & influencers
- 73 countries
- 9 DMO partners



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Visit The USA - UK

- Public relations and trade organization
- Dedicated website, public relations, e-newsletter, annual guide, events
- Greg Evans Consultancy

The screenshot shows the Visit the USA website interface. At the top, there is a search bar and a navigation menu with links: Home, Visit USA, Brochures, News, Offers, Video, Contact Us, Press, Trade & Members. Below the navigation are three tabs: States & Destinations, Attractions & Services, and Type of Holiday. A grid lists 50 US states and territories. A 'get inspired' section features a map and a 'Where to go' section. A 'Travel & Holidays to the USA' section includes a 'Newsletter Sign-up' form and a 'View the Visit USA 2016 Travel Planner' link. A 'Latest News for UK Visitors to USA' section mentions Zika virus. A 'Historic Plantations of Louisiana' advertisement is also visible.



Brand USA Partnership 2015/16

- Established by the Travel Promotion Act as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and communicate U.S. entry policies, Brand USA began operations in May 2011.
 - Inspiration Guide
 - Originals Program – Outdoors, Culinary

NORTHEAST | PENNSYLVANIA

PENNSYLVANIA

APPEALING history & nature

A place of urban adventures and natural beauty, Pennsylvania is full of wonderful traditions that come to life in its bustling cities and small towns. History buffs can experience Revolutionary War heritage at Valley Forge and the Brandywine Valley or explore Gettysburg, a major battle site of the U.S. Civil War. In this year-round playground, discover the state's rugged, wild beauty, with rolling hills, forested mountains, rushing rivers and vast state parks.



Above: Philadelphia skyline

Above: Independence Hall

NORTHEAST

PHILADELPHIA

Discover Philadelphia, the birthplace of America and a modern city where history meets innovation and culture. Located between New York City and Washington, D.C., it's the second-largest city on the East Coast. See the Liberty Bell and Independence Hall in Independence National Historical Park. Along Museum Mile, visit The Barnes Foundation and Philadelphia Museum of Art. Enjoy the city's wonderfully diverse dining scene, with more than 2,500 restaurants, breweries and food trucks. Enjoy tax-free shopping in high-end boutiques along Rittenhouse Row and in vintage shops in Old City. discoverPH.com/international



HERSHEY-HARRISBURG

Explore the wonders of chocolate and make your own Hershey's candy bar at Hershey's "Chocolate Works" attraction. Tour the Susquehanna River on an authentic paddlewheel river boat. Try your luck on the slot machines or follow your favourite horse at Hollywood Casino. The area is an easy drive from New York City and Washington, D.C. visithersheyharrisburg.org



GETTYSBURG

Discover the city where thousands battled in 1863 during the U.S. Civil War and where President Abraham Lincoln delivered his famous Gettysburg Address. Tour the National Military Park by car, bus, Segway, horse-drawn carriage, or take a guided tour on horseback to learn about the major Civil War battle. DestinationGettysburg.com



THE COUNTRYSIDE OF PHILADELPHIA

Explore "America's Garden Capital" with more than 30 stunning horticultural displays within 48 kilometers of Philadelphia. Don't miss Longwood Gardens, a 1,077-acre masterpiece of formal gardens, woodlands and meadows. Stay at a romantic inn, shop at boutiques and galleries or spend the day at the immense King of Prussia Mall. thecountrysideofphiladelphia.com



THE POCONO MOUNTAINS

The Pocono Mountains are home to rolling mountain terrain, breathtakingly beautiful waterfalls, thriving woodlands and winding rivers, as well as nine state parks and two national parks. Find yourself in nature or unwind at a spa, where you can take advantage of one-on-one fitness training and enjoy a deliciously healthy menu. poconomountains.com



What's next?

- Expanded participation with Brand USA
 - Double Inspiration Guide w/partners
 - www.VisitTheUSA.com enhanced state page
 - 3 roadtrips – family, culture/history, outdoors
 - Travel agent training website
 - The Telegraph
- Support IPW participation, leverage location
- Re-entering China market
- Explore partner interest in additional sales and public relations missions
- Continue Visit USA UK membership

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How can we help you?



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