CORONAVIRUS INDUSTRY UPDATE
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Travel Powers the Economy and Enhances the Image of the USA

- **#1 Services Export**
  - 79.6 million international visitors spent $256.1 billion
  - $69 billion trade surplus
  - 31% of U.S. service exports; 10% of all U.S. exports
- **2.8% of GDP**
  - $1.62 trillion in economic output
  - $141.5 billion in tax revenue
- **7.8 Million Jobs Supported by Travel**
  - 5.5 million direct; 2.3 million indirect
  - Top 10 employer in 49 states and DC
  - 1.2 million jobs supported by international travelers
- **International Visitation Enhances the Image of the USA**
  - 74% more likely to have a favorable view of the USA after they visit
  - 61% more likely to support U.S. policies after they visit

Source: US Travel and Pew Research Center as a source along with US Department of Commerce, National Travel & Tourism Office (NTTO)
Economic Growth
Currency
Politics
Safety
Visa Policy
Perceptions
Coronavirus
Brand USA Response to the COVID-19 Pandemic

- **Providing guidance, information and insight**
  - Sentiment research
  - Market insights

- **Delivering hope and optimism**
  - Voice & messaging recommendations
  - Empathetic/Compassionate – Human – Genuine – Story-Driven

- **Building SMART marketing tools**
  - Specific – Measurable – Actionable – Relevant – Timebound
  - Go USA TV
Inspire travel through entertainment

Curate entertainment-driven storytelling with a distinct sense of place

Be the go-to channel for content featuring U.S. destinations
COVID-19 and Travel Sentiment Survey

- Fielded March 10-11, 2020
- National Sample of 1,000 adults 18+
87% of travelers are planning travel in the next six months.

Types of Trips:
- Domestic Leisure: 64%
- International Leisure: 24%
- International Business: 8%
- Domestic Business: 4%
Factors Impacting Decisions to Travel in Next 6 Months

- **Coronavirus/COVID-19**
  - 12%: No impact at all
  - 12%: No impact at all
  - 18%: Slightly impact
  - 22%: Greatly impact
  - 35%: Greatly impact

- **Concerns about the economy**
  - 22%: No impact at all
  - 16%: No impact at all
  - 25%: Slightly impact
  - 20%: Greatly impact
  - 17%: Greatly impact

- **Transportation costs**
  - 16%: No impact at all
  - 13%: No impact at all
  - 27%: Slightly impact
  - 23%: Greatly impact
  - 21%: Greatly impact

*Percent*
58% of travelers planning to travel in the next six months will change their travel plans due to coronavirus.

- Reduced travel plans: 36%
- Changed destination to one I can drive to as opposed to fly: 30%
- Canceled trip completely: 28%
- Changed trip from international to domestic: 22%

Base: Coronavirus Changed Travel Plans
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Q&A