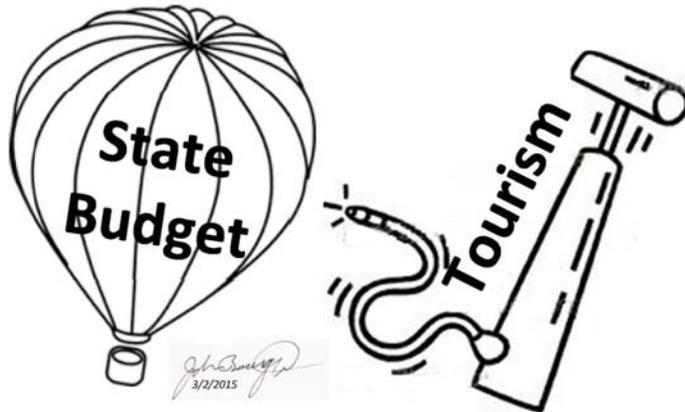


## Fill the gap. Invest MORE in tourism

March 2, 2015 - A simple solution to the State's budget deficit is to invest more in the tourism marketing budget. It's been proven over and over that tourism marketing investment returns 10 times what is spent in taxes and jobs. Need an extra \$20 Million to meet our State's critical needs? Invest \$2 Million *more* in tourism.



And, as word-of-mouth is by far the most powerful marketing tool, grass-roots regional offices ensure optimal performance of the budget. There probably should be a few more!

Unlike most budget expense items, spending on tourism actually *increases* funds available for other purposes.

Governor Malloy himself is aware of its powerful ROI... and the damage his predecessor had wreaked to our State's overall budget by cutting tourism's. When he ran in 2010 he said:

***"(Connecticut) made a gigantic mistake...  
cutting back, and cutting back with respect to culture and tourism..."***

It's smart to avoid our earlier mistakes. Solve the budget deficit by investing more in tourism marketing.

Attached is a report that cites Connecticut's experience cutting tourism budgets as a "Case Study" in what not to do... amidst success stories of other states.

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John Bourget is a marketing data consultant to Connecticut DECD's Office of Tourism, our Regional tourism offices and numerous of our State's leading attractions and events.



# THE POWER OF TRAVEL PROMOTION

SPURRING GROWTH, CREATING JOBS



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# EXECUTIVE SUMMARY

During an era when tight budgets have become the “new normal” in state capitals and city halls across America, the pressure to cut even critical programs is often intense. Legislators and other policymakers need to be armed with the facts when making tough decisions about budget priorities. Over the past few decades, one of the clearest, most compelling facts that has emerged is that travel promotion represents one of the best investments a state or city can make.



## AMONG THE KEY FACTS THIS REPORT DOCUMENTS



Travel and tourism is a **cash-generating machine** for state and local governments. In 2012, travel generated \$129 billion in tax revenue to government at all levels and \$58.4 billion to state and local governments – enough to pay the wages of **every** firefighter and police officer in the country.



Wise strategic investments in travel promotion by destinations kick off a **virtuous cycle** of increased traveler visits, greater traveler spending in local communities, faster job creation and higher tax revenues that far surpass the initial investment.



Like other valuable brands, travel destinations require **consistent engagement and investment**. States and cities that fail to invest will quickly lose market share to competitors that can take years to recover, while those that invest strategically to build brand appeal generate a **strong return on investment**.

In the aftermath of the Great Recession, the travel industry has stepped forward as one of the key drivers of the American economy, a leading employer in communities across the U.S., and a highly efficient, proven revenue generator for state and local governments. States and cities that treat travel promotion budgets like strategic investments will be rewarded with more visitors, more jobs and higher tax revenues.

# THE POWER OF BRANDS

Most people associate brands with iconic names like Coca-Cola, Apple, McDonald's or Google. Yet nearly all products that compete successfully in the global marketplace have a compelling brand identity – including travel destinations.



In recent years, brand awareness has extended well into the political arena, with parties and individual candidates spending heavily to communicate their “brands” to voters.

During the 2012 election cycle, candidates for U.S. Congress spent approximately \$1.8 billion<sup>5</sup> on a variety of marketing activities, rivaling Ford Motor Company, which spent \$2.1 billion in advertising and promotional spending.<sup>6</sup>

Like the iPhone or a Diet Coke®, each destination has an identity that evokes emotion, imagery and reactions that inspire travelers to visit. From “I [Heart] New York®” to “Virginia is for Lovers®,” and from “Pure Michigan®” to “What happens in Vegas, stays in Vegas®” – all have developed as unique, exciting and valuable brands that draw millions of visitors to their respective regions.

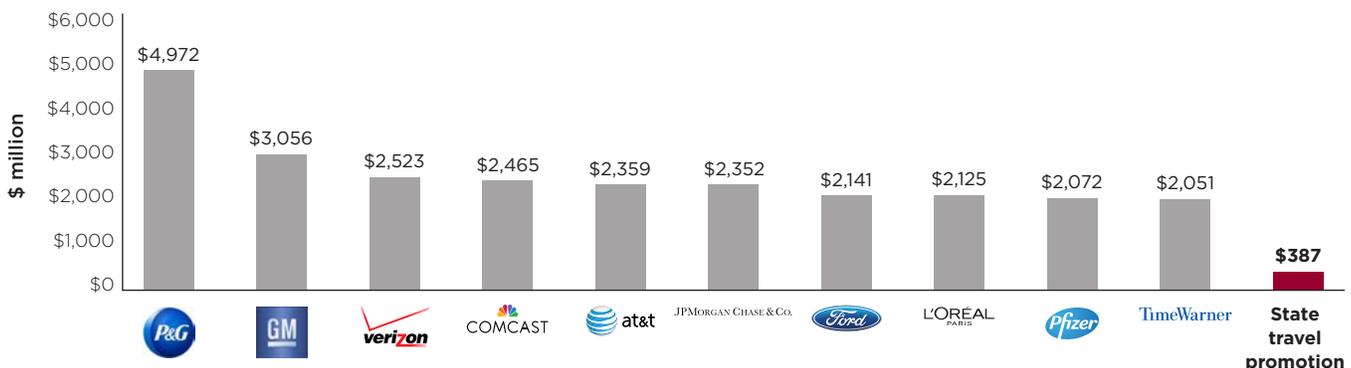
Of course, brands do not flourish in a vacuum. As Jez Frampton, global chief executive of Interbrand, recently wrote, “Only brands that stay transparent, actively engaged and true to their promises will manage to capture hearts and minds, earn trust, and command loyalty and premium.”<sup>1</sup>

In short, brands are business assets requiring skillful marketing and extensive promotion to stay recognized and relevant. Leading companies invest billions of dollars each year on advertising campaigns, marketing materials, social media outreach and other creative brand-building tools in an effort to appeal to customers, increase market share and grow revenue.

In 2011, the top 50 national advertisers spent \$75.3 billion on marketing and promoting their products.<sup>2</sup> By comparison, the 50 state tourism offices spent about one-half of one percent as much – or about \$387 million – to market their destination brands.

State tourism offices preliminarily reported investing \$407 million to market and promote their destinations to domestic and international travelers in fiscal year 2012.<sup>3</sup> The median marketing budget reported by states was \$6.5 million.<sup>4</sup>

Companies Spend Billions Promoting Their Brands



SOURCE: Advertising Age and U.S. Travel Association, 2011.

# PROMOTION BOOSTS ROI



Smart business leaders understand that even the best brands lose market share if advertising and promotion budgets lag behind competitors. Take two of the world's most powerful brands – Coke® and Pepsi.

In 2012, PepsiCo CEO Indra Nooyi announced a dramatic 50-percent increase in the company's advertising and marketing budget to support its soft drinks, including its flagship brand, Pepsi.<sup>7</sup> The reason? Between 2004 and 2010, PepsiCo's advertising budget declined from 6.0% of revenue to 4.0% of revenue – and Pepsi lost valuable market share to archrival Coke®.<sup>8</sup>

As one Wall Street analyst put it, “PepsiCo overall needs to step up investments behind its brands to reinvigorate them. If you go back 10 years, they have definitely been under-investing relative to Coke®.” A major PepsiCo investor cheered the move, pointing to a “clear link between advertising spend and sales.”<sup>9</sup>

The same dynamic is at work in the travel industry. While advertising and promotion spending may be seen as easy targets in a time of tight budgets, experience shows that failing to invest in promotion reduces a destination's competitiveness in the travel marketplace. States and cities that neglect their promotion budgets weaken their destination brands and lose market share, just as sure as Pepsi or Coke®.



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Your trip begins at michigan.org



# TRAVEL PROMOTION STRENGTHENS ECONOMIC VITALITY

Wise and strategic investments in travel promotion feed a virtuous cycle of economic benefits. Travel promotion programs spur interest in visiting destinations among potential travelers. Stronger travel interest generates more visitors. Additional visitors spend more at local attractions, hotels, restaurants, retail stores and other businesses. Greater travel spending supports more local jobs and generates additional tax revenue for state and local governments.

## TRAVEL PROMOTION'S VIRTUOUS CYCLE



As the case studies in this report clearly demonstrate, investments in travel promotion pay for themselves many times over. Conversely, indiscriminate cuts in promotional budgets represent the ultimate penny-wise, pound-foolish mistake.



According to the most recent data by the U.N. World Tourism Organization (UNWTO) and Oxford Economics, other countries' promotional spending to attract travelers averaged \$11 per visitor for the 54 surveyed.<sup>17</sup>

At \$2.95 per overnight visitor, Brand USA's investment is less than 41 of the 54 countries tracked by the UNWTO, including:<sup>18</sup>



#### AUSTRALIA

\$106.7 million promotion budget or \$19 per visitor.



#### BELGIUM

\$109 million promotion budget or \$14.50 per visitor.



#### MEXICO

\$133.6 million promotion budget or nearly \$6 per visitor.



#### UNITED KINGDOM

\$139.3 million promotion budget or \$4.74 per visitor.

## Brand USA: Competing and Winning in the International Travel Market

States are not the only winners and losers in the travel promotion game. Countries also compete in the highly competitive – and highly lucrative – global travel market.

Between 2000 and 2010, the world travel market grew by more than 60 million annual travelers.<sup>10</sup> Yet in 2010, the U.S. welcomed essentially the same number of travelers as it did in 2000 – a “lost decade” for the U.S. travel industry that had severe implications for the national economy.<sup>11</sup> By failing to keep pace with the growth of global long-haul travel, the U.S. economy lost:

- **78 million visitors;**
- **\$606 billion in travel and tourism output;**
- **467,000 jobs; and**
- **\$37 billion in travel-generated tax revenue.<sup>12</sup>**

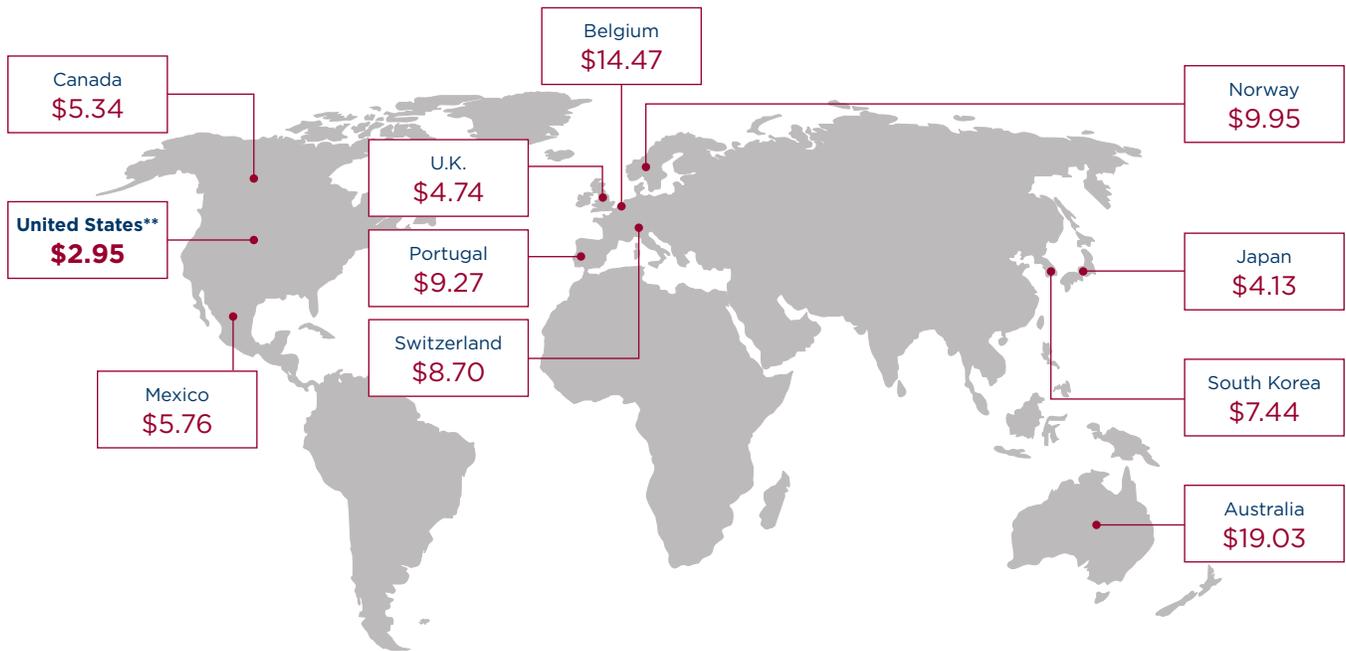
To prevent the U.S. from falling further behind, in 2010 Congress passed and President Obama signed into law the Travel Promotion Act. In 2012, the U.S. launched the first-ever National Travel and Tourism Strategy and established a national goal of attracting 100 million international travelers – and a resulting \$250 billion in travel-related spending – to the U.S. by 2021.<sup>13</sup>

One of the most important consequences of the Travel Promotion Act was the creation of Brand USA, the public-private marketing and promotion entity aimed at helping the U.S. compete for international visitors – all at no cost to U.S. taxpayers. After just more than a year of operation, Brand USA is already demonstrating the positive impact of travel promotion.

In 2012, Brand USA launched the “Land of Dreams” campaign in three countries – the United Kingdom, Japan and Canada. The goal was to raise awareness about the incredible travel options in the U.S.; change perceptions about the difficulties in visiting the U.S.; and create a positive buzz about traveling to the U.S. – all designed to ultimately drive increased visitation, spur job creation and fuel economic growth.

After just six months, the number of potential travelers who reported they intend to visit the U.S. increased by 14 percent in Japan and the U.K. and by 12 percent in Canada – an early, critical metric of success.<sup>14</sup> Assuming Brand USA is allocated its maximum budget of \$200 million – not one dime of which comes from U.S. taxpayers – this represents an investment of just \$2.95 to attract each visitor.<sup>15</sup> Considering that each overseas traveler to the U.S. spends an average of \$4,500 per trip, that \$2.95 investment is well worth the return.<sup>16</sup>

### U.S. Travel Promotion Investment Lags Behind Many Other Countries (Spending Per Overnight Visitor\*)



SOURCE: Oxford Economics and UNWTO, 2012; U.S. Travel Association, 2013  
\*2012 is preliminary data. \*\*Based on 2013 forecast.

Compared to what other countries are spending to draw travelers, this is an exceptional bargain that speaks volumes about the vast potential of the U.S. as a global travel destination.

What potential impact will Brand USA’s campaign to attract more international visitors have on the U.S. economy? Every one percent increase in international travelers from the markets where Brand USA’s first campaign ran (the U.K., Japan and Canada) translates into nearly 300,000 visitors, pumping more than \$500 million annually into our economy and supporting more than 7,000 additional American jobs – a significant economic contribution on a relatively modest investment compared to our competitors.<sup>19</sup>

Many destinations and states within the U.S. are leveraging Brand USA’s efforts by investing their own resources in international marketing programs. According to Destination Marketing Association International’s “DMO Marketing Activities” report, one-half of all destination marketing organizations in the U.S. and more than three-quarters of state tourism offices invested in international promotion in 2012.<sup>20</sup> Some of these funds are now dedicated to Brand USA’s cooperative marketing partnership programs, helping to boost the brand appeal of both the U.S. and participating destinations – and their respective economies – upon capturing the lucrative international visitor market.

# TRAVEL DRIVES AMERICA'S ECONOMY

During the ongoing economic recovery, the travel industry has emerged as a key driver of U.S. economic growth. The data clearly demonstrate that travel has a major economic impact not only nationally, but also in practically every state in the country.



## Widespread Economic Impact

In 2012, spending in various industries directly linked to travel – including transportation, lodging, food services, amusement parks and recreation, travel management and retail – generated \$855.4 billion in direct economic output.<sup>21</sup> When indirect and induced effects are included from the travel industry's spillover to other industries – ranging from utility and energy companies to manufacturing and local farms – travel's total impact on the U.S. economy reached \$2 trillion.<sup>22</sup> Linked to many other industries, travel generates additional demand throughout the economic supply chain, boosting job skills and spurring investment in other industries indirectly related to travel.<sup>23</sup>

Nationwide, 14.6 million Americans – or one in eight in the private sector – are employed in jobs dependent on travel and tourism.<sup>24</sup> Travel is a top 10 employer in 48 states and the District of Columbia.<sup>25</sup> Unlike jobs in industries such as manufacturing and information technology, travel jobs cannot be shipped overseas.<sup>26</sup>

## A Gateway to Opportunity

Travel jobs serve as a gateway to opportunity and a middle-class life for millions of Americans. In addition to teaching critical job skills and offering rewarding career paths, the travel industry also provides many employees with the flexibility they need to fulfill their higher education goals.

- Among workers who began their careers in the travel industry, one-third earned at least a bachelor's degree, compared to just 28 percent in health care, 19 percent in construction and 18 percent in manufacturing.<sup>27</sup>
- Of the 5.6 million Americans working part time while pursuing higher education, nearly one-third, or 1.8 million workers, work in the travel industry.<sup>28</sup>
- More than half of all travel industry employees – a total of four million workers – earn middle-class wages or higher.<sup>29</sup>
- Two out of five workers who first took a job in the travel industry are earning more than \$100,000 per year.<sup>30</sup>

**Two out of five workers who first took a job in the travel industry are earning more than \$100,000 per year.**



### **A Major Job Creator, Leading the Recovery**

Since the employment recovery began in March 2010, the travel industry has created more than 440,000 new jobs (as of June 2013), making up 93 percent of the jobs lost during the recession compared to 74 percent for the rest of the economy.<sup>31</sup>

The most recent data show that the travel industry continues to outpace the rest of the U.S. economy when it comes to adding jobs. As of June 2013, the travel industry added jobs at a 20 percent faster rate than the rest of the economy since March 2010.<sup>32</sup>

### **The Future Looks Bright**

According to a study by McKinsey Global Institute, the travel industry will continue to fuel economic growth and job creation in the coming years. One in every seven new jobs added in the next decade – up to 3.3 million – could come from the travel-driven hospitality and leisure industries.<sup>33</sup> International travel will play an increasingly prominent role, with the growth in overseas visitors expected to increase by approximately five percent per year for the next five years.<sup>34</sup>

As one of the few industries that consistently generate a trade surplus, travel has also emerged as a strong contributor to the U.S. balance of trade. Over the past decade, the U.S. trade surplus in travel improved ten-fold, from \$5 billion in 2002 to \$50 billion in 2012 – double the improvement in agriculture trade surplus.<sup>35</sup> In addition to boosting trade, spending by international travelers while visiting the U.S. also directly supported 1.1 million American jobs in 2012.



# TRAVEL BUILDS STRONG TAX BASE

Travel represents an important and growing source of revenue for cash-strapped state and local governments. In 2012, travel generated \$129 billion in tax revenue to government at all levels.<sup>36</sup> This travel-generated revenue represents the equivalent of a \$1,100 tax break for each American household, which is what they would have to pay in additional taxes without travel's contribution.<sup>37</sup>



In 2012, travel and tourism generated

**\$58.4 billion**  
in tax revenues  
to state and local  
governments

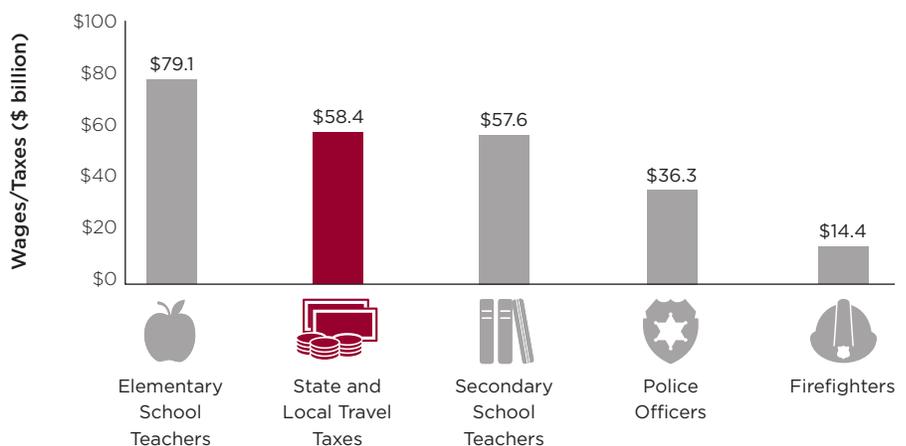
This **\$58.4 billion** is enough to cover the wages of all police officers and firefighters in the entire nation.

Today, tax revenue generated by travel contributes more than five percent of the total state taxes collected in 17 states.<sup>38</sup> In heavily traveled destinations such as Nevada and Hawaii, travel contributed 16 and 18 percent of total tax revenues respectively.<sup>39</sup>

Another way to look at the contribution of travel-generated tax revenue is to consider the essential public services it can fund.

In 2012, travel and tourism generated \$58.4 billion in tax revenues to state and local governments.<sup>40</sup> This \$58.4 billion is enough to cover the wages of all police officers and firefighters in the entire nation.<sup>41</sup>

## Travel Taxes Finance Essential Public Services



SOURCE: Bureau of Labor Statistics, 2011; U.S. Travel Association, 2012

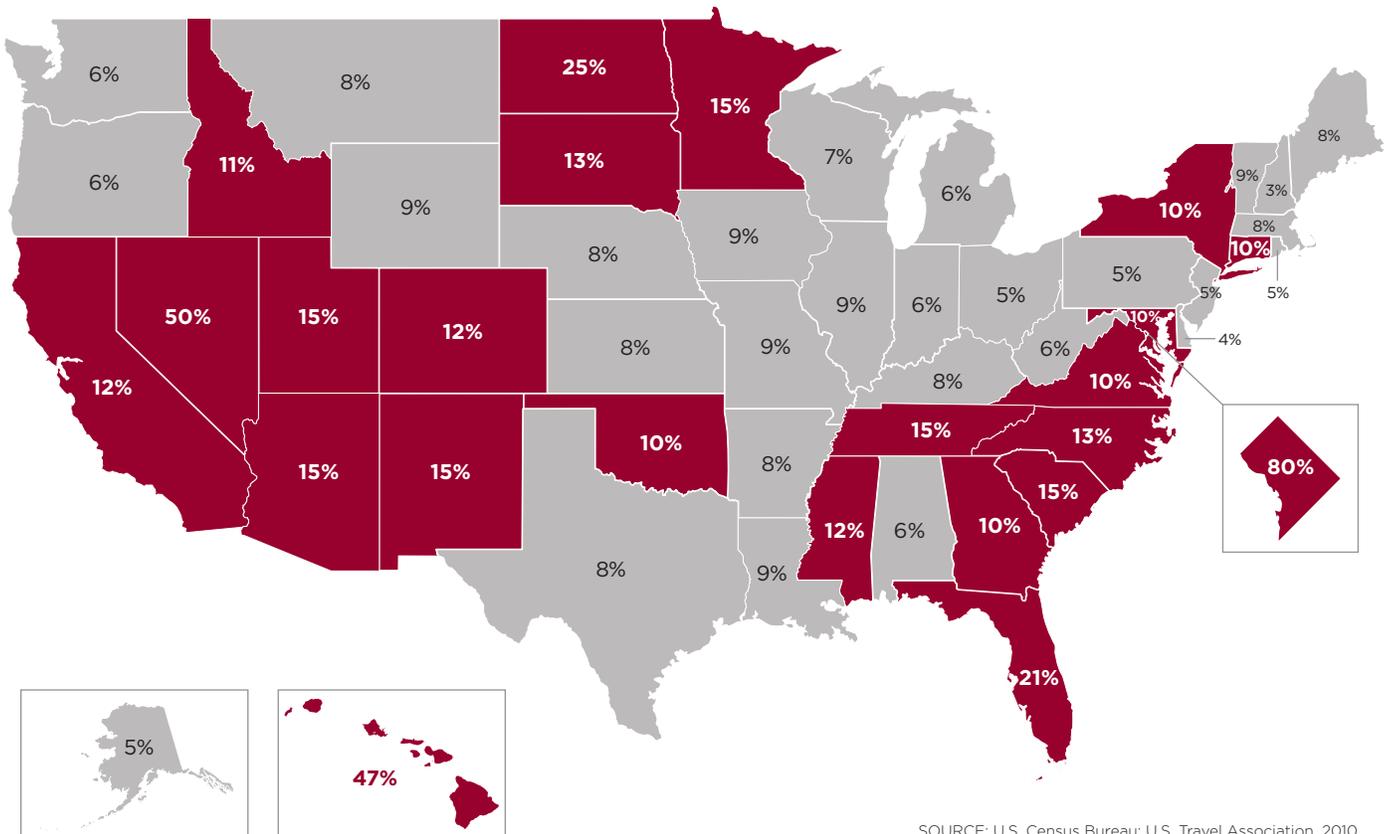


Or consider education. State and local revenue generated by travel-related taxes could cover the salaries of nearly 100 percent of all secondary school teachers in all 50 states or about seven out of 10 elementary school teachers.<sup>42</sup>

Or look at it from the students' perspective. The \$656 million in travel-generated taxes in Washington, D.C. is enough to educate 80 percent of the public school students in the District.<sup>43</sup> Nevada's \$1.8 billion in state and local travel taxes is enough to cover the education of half of the state's primary and secondary school students.<sup>44</sup> Nationwide, travel generated enough tax revenue to cover at least 10 percent of the cost of educating our children in almost half of the 50 states.<sup>45</sup>

States that leverage the revenue-generating power of travel by undertaking strategic, sustained investment in travel promotion programs reap immediate returns in terms of economic benefits. States that slash their promotion budgets, on the other hand, suffer long-term negative consequences and spend many years attempting to recover the lost market share and tax revenue.

**Travel Taxes Educate Our Children**  
 (Percentage of K-12 public school students educated by state and local taxes)



SOURCE: U.S. Census Bureau; U.S. Travel Association, 2010

**Nationwide, travel generated enough tax revenue to cover at least 10 percent of the cost of educating our children in almost half of the 50 states.**

# TRAVEL DESTINATIONS SPUR ECONOMIC DEVELOPMENT

In addition to helping states and localities build a strong tax base, a vibrant travel and tourism industry improves the quality of life for local residents and makes a community more attractive to potential employees and businesses.



As one recent study put it, “Public lands in the West, with rivers, lakes, mountains and recreational opportunities, serve as an attractive backdrop that has transformed the economy from dependence on resource-extractive industries to one that has seen growth from in-migration, tourism and modern economy sectors such as finance, insurance and real estate.”<sup>52</sup>

In communities across America, attractions such as museums, historic buildings, cultural sites, sports teams, outdoor recreational opportunities, festivals, concerts and other events instill pride among local residents and create a better quality of life. These attractions are important community assets, which not only draw visitors to a region, but also appeal to businesses deciding where to locate a new plant or facility.

Developing a region’s travel-related assets, therefore, serves the dual purpose of attracting both more visitors and more businesses – a win-win proposition for a local economy. A 2013 survey of corporate executives offers compelling evidence.<sup>46</sup>

- More than one-fifth (22%) of corporate executives cited “quality of life concerns” as the primary reason for the need to relocate a facility, ahead of factors such as healthcare costs (19%), poor infrastructure (17%) and labor availability (17%).<sup>47</sup>
- Half of corporate executives classified quality of life factors, such as cultural and recreational opportunities, as either “very important” or “important” to their site selection decisions.<sup>48</sup>

Not surprisingly, *Forbes* includes cultural and recreational opportunities among other critical factors, such as job and income growth, when ranking its “Best Places for Business and Careers.”<sup>49</sup>

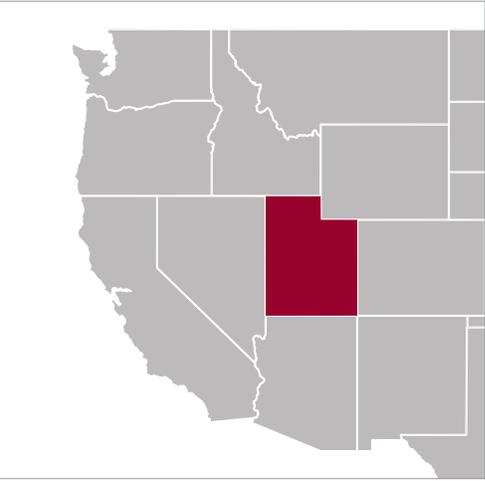
Young professionals, in particular, heavily favor locations offering diverse activities – such as outdoor recreation, arts and cultural attractions – when deciding where to start their careers.<sup>50</sup> Employees in flexible occupations such as law, finance, insurance, real estate and healthcare are also attracted to destinations because of their amenities, while studies have shown that natural attractions are important to drawing knowledge-based workers.<sup>51</sup>

The bottom line: Destinations that offer the high quality of life associated with desirable travel attractions have a significant competitive advantage when it comes to attracting business investment and dedicated employees.



**Stowe, Vermont: Stowe's Slopes Entice Innovative Business**

During its early days in the mid-Atlantic suburbs, high-tech, green energy startup Utility Risk Management Corporation found itself struggling to attract the talent needed to grow to the next level. With demand for its products rising, Utility Risk Management Corporation searched for a new location that would appeal to the high-tech, green energy talent pool from which the company hires. The solution? Relocate to the gorgeous ski town of Stowe, Vermont, in a state where visitors spend \$2 million, and as the No. 4 employer, travel spending generates jobs for 19,400 individuals.<sup>53</sup> While state incentives were obviously a plus, the company believed Stowe's slopes and amenities would appeal to potential employees.<sup>54</sup> In leveraging the allure of travel destinations, Utility Risk Management Corporation followed a well-tread path used by many successful technology companies. As a result of his passion for skiing, Thomas Watson led IBM to open a plant in Essex Junction, Vermont – providing easy access to his cabin in Stowe.<sup>55</sup>



**Salt Lake City, Utah: Sports and Outdoors Appeal to Travelers and Employers Alike**

Salt Lake City, Utah has been consistently ranked as a top place to live and work.<sup>56</sup> Certainly, the region's affordable housing, supportive government and other economic benefits have played a role. But the Salt Lake City area also offers an incredible combination of outdoor activities, cultural attractions and a pristine environment – creating a unique value proposition that appeals to both travelers and employers alike.<sup>57</sup> Businesses such as Huntsman Corporation, eBay, Unisys, 3M, Myriad Genetics and a Kroger subsidiary have all made Salt Lake City their home.<sup>58</sup> International firms like Amer Sports & Winter Outdoor Americas seek out Salt Lake City not only for its world-class skiing, running and biking trails, but also for easy access to international flights out of Salt Lake International Airport.<sup>59</sup> Meanwhile, a thriving travel industry is now Utah's No. 5 employer, offering jobs to 71,400 employees.<sup>60</sup>

# INCREASED INVESTMENT DELIVERS REAL RESULTS

## Sarasota, Florida: Repurposed Industrial Area Invigorates Economic Recovery

As one of the hardest hit regions during the Great Recession, Sarasota, Florida was struggling with falling housing prices and rising unemployment. Looking for ways to stimulate the region's economy, County Commissioner Joe Barbetta and other local leaders hit on a creative idea: Transform an old mining lake into the only internationally sanctioned rowing regatta facility in North America.

To get the project rolling, Sarasota reinvested \$20 million from a local tourist tax, along with highway infrastructure funds and state funds, to create<sup>61</sup> Nathan Benderson Park, a premier 2,000-meter sprint course and regatta center.<sup>62</sup>

During the 2010 regatta season, the sports facility hosted four events, which generated \$4.5 million in direct economic impact from 30,000 attendees, including 1,200 athletes from 62 countries.<sup>63</sup> Through an aggressive travel promotion campaign, the number of visitors has grown every year, including a 10-percent increase in 2012 over 2011, with a 16-percent jump in visits from Europeans.<sup>64</sup> And traveler-related spending nearly doubled in just one year.<sup>65</sup>

According to the Sarasota County Commission, from 2009 to 2011 the return on investment for Sarasota County tourism advertising increased nearly 50 percent, demonstrating the power of travel promotion to generate real economic benefits.<sup>66</sup>

Nathan Benderson Park is also a prime example of how travel assets create a virtuous cycle of economic development and job creation in a region. Developers in the area are investing more than \$40 million to build a new regional mall, two new hotels, restaurants and other attractions on a 'regatta island' – creating an Olympic-type setting for both visitors and residents to enjoy. The 680,000-square-foot Mall at University Town Center is projected to open in 2014 and generate \$500 million in annual sales revenue.<sup>67</sup>

VISITFLORIDA®



Yesterday's abandoned lake is now a key driver of economic development in Sarasota and Manatee Counties, as well as the entire southwest Florida region.<sup>68</sup> But local governments are just beginning to tap into the potential of Nathan Benderson Park by making strategic investments in travel promotion. Collectively, Sarasota County committed \$5 million to promote and market the facility in both 2012 and 2013 and is making targeted investments for specific events.<sup>69</sup>

In an effort to lure lucrative international visitors to the region, Sarasota has embarked on a marketing campaign, supported by a \$90,000 promotion budget, to bring the 2017 World Rowing Championships to the region.<sup>70</sup> Attendance at the event would nearly equal the population of the city of Sarasota and pump about \$13 million in direct spending into the local economy.<sup>71</sup> The championship's total economic impact would be nearly \$25 million, according to tourism estimates, far exceeding the financial investment in promotion.<sup>72</sup>

“It is competitive to win this bid, but I've spent the last four years traveling the country to compare our facility with others and really understand the rowing culture. Our region is ready to take tourism to the next level – this is a huge opportunity right at our fingertips.”

-Paul Blacketter, executive director of planning, Benderson Development





**Jefferson City, Missouri: Unique Travel Asset Revives Local Community**

The transformation of an old State Penitentiary into a major visitor attraction sparked the resurgence of an entire community in Jefferson City, Missouri.<sup>73</sup>

In 2009, forward-looking Jefferson City residents partnered with local investors to begin developing a decommissioned prison and its surrounding 140 acres.<sup>74</sup> At the unveiling of the project’s plans, Cole County Presiding Commissioner Marc Ellinger sensed the opportunity for economic growth and job creation, stating, “The old prison site is a unique opportunity for economic development in our community, and this is a big step toward realizing that growth in our core.”<sup>75</sup> Opened in late 2009, by the end of 2010 the prison was a major tourist attraction, injecting economic benefits into the community from 11,700 visitors to the attraction alone. Visitation to the Missouri State Penitentiary was nearly 20,000 in 2012.

But the rapid and immediate influx of tourists did not just happen organically – it was the outcome of savvy investments in travel promotion. Jefferson City increased visitation to the penitentiary in the first year with a strategic and targeted marketing campaign, including outdoor billboards, print and online banner ads, showcasing its latest attraction.

Through a partnership with the Missouri Division of Tourism, Jefferson City invested more than \$100,000 in the fiscal year 2011 campaign. By 2012, traveler spending injected \$129 million and 3,600 jobs into the local economy.<sup>76</sup>

**Jefferson City Economic Impact**

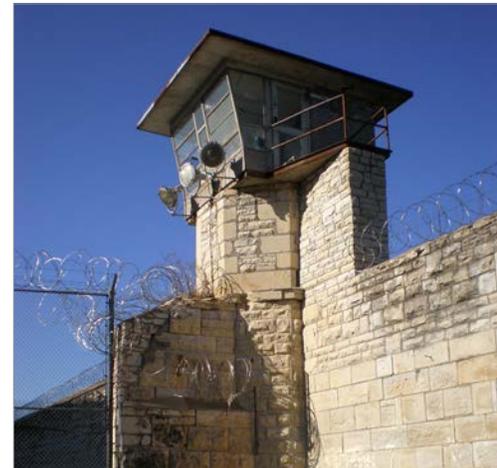
	2010	2011	2012
Missouri State Penitentiary Visitation	11,700	17,203	19,121
Marketing Budget (Fiscal year)	\$115,500	\$68,850	\$66,750
Travel Spending	\$122,000,000	\$125,000,000	\$129,000,000

SOURCE: Missouri Division of Tourism, 2013

Not only did the prison stimulate greater travel to Jefferson City, it spurred other economic development, including restaurants, retail stores and a new \$67.7 million courthouse that opened in 2011.

“The design of this new courthouse embraces the characteristics of Jefferson City and creates an inviting atmosphere focused on the community. Putting this new courthouse on the bluff at the old prison site represents the perfect combination of history and opportunity.”

–Brad Scott, GSA regional administrator<sup>77</sup>





## Finger Lakes, New York: Travel Promotion Transforms Rural Area Into Napa Valley East

Initially, Corning, New York – a small, rural town between New York City and Buffalo – seemed to hold little appeal as a travel destination.<sup>78</sup> Government officials struggled to promote economic development while the region’s largest employers such as Corning Incorporated had trouble attracting talented employees.<sup>79</sup>

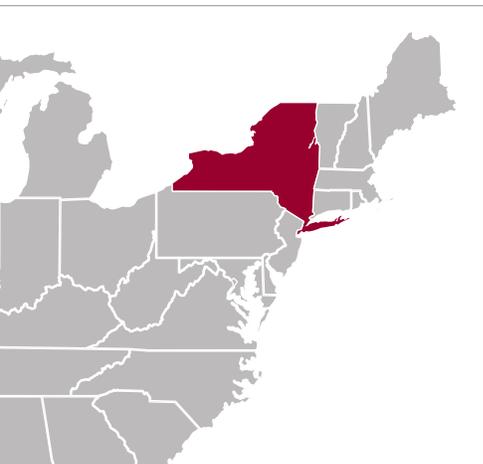
Then, in early 2000, business and government leaders turned to travel and tourism as a means of boosting the region’s economy, increasing its appeal as a place to live and work, and enhancing the quality of life for people in the community.

At the time, Corning Enterprises was in the midst of a \$65 million investment to enlarge and enhance The Corning Museum of Glass, turning it into a prime cultural attraction.<sup>80</sup> To create a true brand identity for the region and to promote local restaurants, winemaking and other attractions, Corning Enterprises joined forces with three counties to launch a coordinated campaign – “Finger Lakes, Wine, and Much More.” In March 2000, the Finger Lakes Wine Country Tourism Marketing Association was established with a mission of promoting the region as a unique destination.

In the first year of operation, a \$156,000 investment in media and advertising generated an incremental \$11.4 million in travel spending – a \$21 return for each \$1 invested.<sup>81</sup> The following year, the organization’s budget increased to \$680,000 with additional funding from wineries, wine trails, hotels, Coach USA and a local trust company.<sup>82</sup> In 2001, 149,000 travelers visited the region, injecting \$14.7 million into the local economy.<sup>83</sup>

More than a decade later, travel continues to deliver proven economic benefits. Finger Lakes Wine Country continues to invest in travel promotion, advertising and marketing to develop the value of its brand and draw new visitors. According to a December 2012 study by Longwoods International, with a \$873,000 promotion budget, the Finger Lakes Wine Country 2012 marketing campaign resulted in:

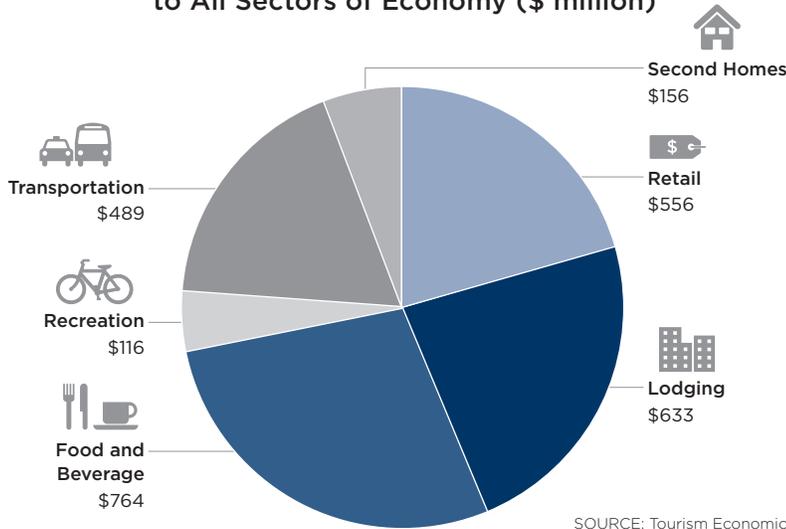
- 301,000 incremental day and overnight trips to the region in just a seven-month period;
- \$38 million spent by visitors in the local economy, up 16 percent from 2010;
- \$3.4 million in taxes; and
- An ROI of \$44 in trip spending for \$1 invested in marketing the region, up 10 percent from 2010.<sup>84</sup>



The travel industry in Finger Lakes Wine Country has a significant impact. In 2011, total travelers to the region:

- Supported 59,000 total jobs;
- Directly contributed \$346 million in state and local tax revenues;
- Spent \$2.7 billion, up six percent from 2010, on local goods and services, supporting a variety of businesses as seen in the chart below.<sup>85</sup>

**Finger Lakes Travelers Significantly Contribute to All Sectors of Economy (\$ million)**



SOURCE: Tourism Economics, 2011

Today, Finger Lakes Wine Country is the second-largest wine region in the U.S., boasting more than 100 wineries spread across 900 square miles and 11 Finger Lakes. Travelers to the region enjoy and support not only area wineries and the landmark Corning Museum of Glass, but also 400 registered historic sites, 300 B&Bs, more than 100 restaurants, 26 state parks and 2,000 miles of hiking and biking trails.<sup>86</sup>

“Finger Lakes Wine Country provides a concentrated marketing effort that one entity alone could not accomplish. This public-private partnership has enabled our region to attract and welcome hundreds of thousands of visitors from more than 35 countries, and provides an attractive economy and community for those who live here. Our regional tourism industry provides job opportunities for full-time employment as well as wonderful employment opportunities for students and seniors.”

-Beth Duane, director, marketing & community relations, The Corning Museum of Glass

“We’re reminded time after time that New York is, at heart, a tourism state. I’m especially proud that the Finger Lakes region plays such a prominent role in this leading statewide industry. Our wine country and our countless visitor attractions are second to none. The most effective investments we make are usually aimed at strengthening these tourism foundations and promoting our strengths to keep attracting more and more visitors, and to continue building new tourism-related opportunities for economic growth and job creation in the future.”

-New York State Senator Tom O’Mara





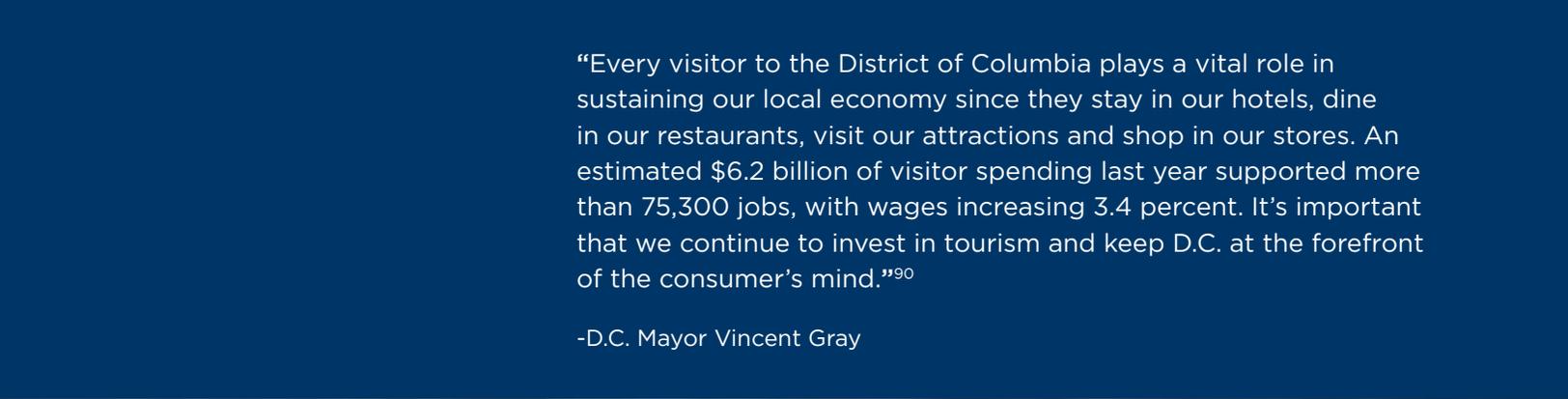
**Washington, D.C.: Capital Investment Pays Monumental Dividends**

Despite a strong local economy and growing tourism assets, Washington, D.C. faced a significant challenge competing against other top destinations with larger marketing budgets. The city recognized the importance of travel to its economy but lagged behind other cities that could afford to invest heavily in marketing and promotion programs. Washington’s 2012 travel budget of \$13.8 million paled next to New York’s budget of \$35.2 million and Orlando’s \$49.8 million.<sup>87</sup>

About 13 percent of the budget for Destination DC, the official convention and tourism corporation for Washington, D.C., was invested in direct marketing, limiting the scope of its advertising campaigns and promotion.<sup>88</sup>

Recognizing the economic benefits of increased visitation and travel spend to the city, the D.C. City Council boosted Destination DC’s budget by 20 percent, approving an additional \$3 million for 2013. This investment was dedicated specifically for marketing, allowing the city to aggressively court potential travelers at a level previously unseen in the nation’s capital.<sup>89</sup>

By removing obstacles to efficient and effective promotion efforts, and by boosting the promotion budget, the city will now be able to leverage these unmistakably positive travel trends into additional growth.



“Every visitor to the District of Columbia plays a vital role in sustaining our local economy since they stay in our hotels, dine in our restaurants, visit our attractions and shop in our stores. An estimated \$6.2 billion of visitor spending last year supported more than 75,300 jobs, with wages increasing 3.4 percent. It’s important that we continue to invest in tourism and keep D.C. at the forefront of the consumer’s mind.”<sup>90</sup>

-D.C. Mayor Vincent Gray



# WHAT HAPPENS WITHOUT PROMOTION?

## Connecticut: Budget Cuts Equal “Gigantic Mistake”

Early in 2010, an ominous report from the Connecticut Office of Legislative Research signaled downward trends in nearly all travel-related categories, including major attraction visitation, air passengers, casino slot revenue and travel-related employment.<sup>91</sup> Travel is a significant contributor to Connecticut’s economy. In 2010, travelers visiting Connecticut spent \$8.9 billion, supporting jobs for 60,400 people and generating \$774 million in state and local tax revenues. Although the report optimistically predicted a rebound in 2011, the turnaround never materialized. Why? One main reason: Connecticut eliminated its entire tourism budget.

After just one year of this disastrous experiment, Connecticut’s travel-related tax revenue growth slowed to half the pace it achieved even during the deep recession of 2009-2010.<sup>92</sup> To reverse this decline, the travel industry helped lead a campaign to educate state and local officials about the virtuous cycle of travel promotion in terms of its positive impact on tax revenues, jobs and economic development.

During his successful 2010 campaign for governor, Daniel P. Malloy proposed to reinvigorate the state’s travel promotion budget as part of his platform.

“[Connecticut] made a gigantic mistake, in my opinion, of doing what we’ve been doing over the past couple of years in cutting back, cutting back, and cutting back with respect to culture and tourism. It’s going to take us a few years to undo that damage unfortunately.”<sup>93</sup>

-Connecticut Governor Daniel P. Malloy

In June 2011, more than 4,000 active and engaged travel industry stakeholders with the support of newly elected Governor Malloy, Connecticut committed to investing \$15 million into travel promotion at a time when many other state programs were being cut. The revived campaign included television and radio advertisements, upgrades to the travel website CTVisit.com and improved visitor guides.<sup>94</sup>

Connecticut was fortunate to reverse course quickly. By 2013, the economic outlook from Connecticut Economic Digest forecasted a quick recovery for travel in Connecticut and a much-needed injection into the state’s economy – propelled by a two-year, multimillion dollar marketing initiative to develop, foster and stimulate the state’s brand identity and bolster travel and tourism.<sup>95</sup>

**Connecticut**  
still revolutionary

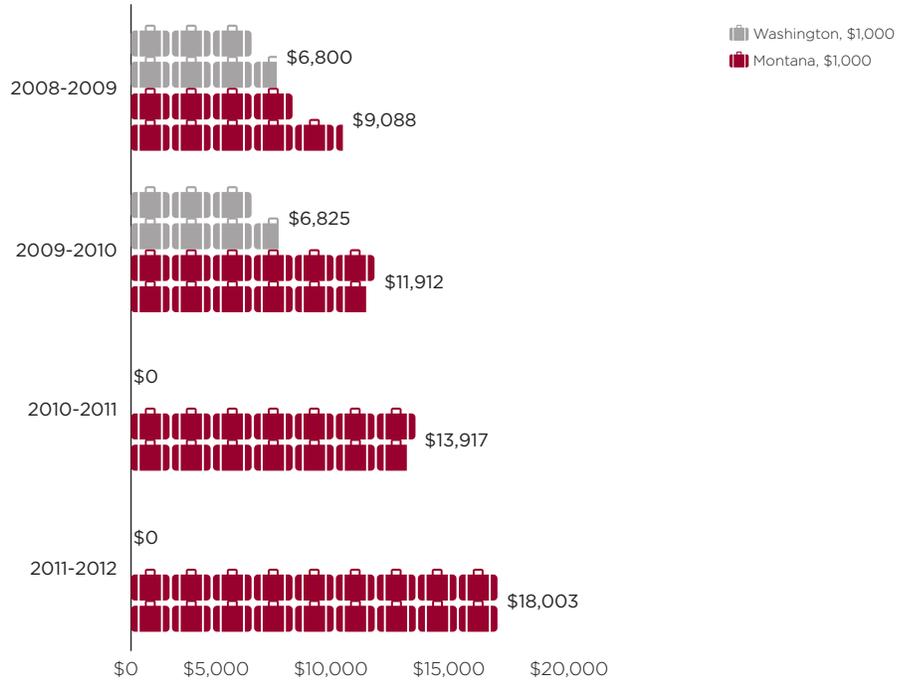




### Washington State: Competitors Cannibalize Travel Market

In 2011, the state of Washington took the radical step of completely shutting down its tourism office. Perhaps sensing an opportunity to increase market share, Washington’s neighbors increased their promotion budgets, including a 30-percent increase in Montana during the most recent budget cycle.<sup>96</sup>

**Washington State’s Competitors are Gaining an Edge with Travel Promotion Investment**  
(\$ thousands)



SOURCE: U.S. Travel Association, 2013

The results were predictable.

In 2011, traveler spending in competing Montana grew 70% faster than in Washington state. Travel-related tax revenues also grew at a far faster rate in Montana compared to Washington.

Not only is Washington state lagging seriously behind its nearby competitors when it comes to travel spending and tax revenue, it is falling behind the rest of the country as well. In 2012, the growth in traveler spending in Washington state was 40 percent slower than national growth,<sup>97</sup> while growth in state and local taxes generated by travel was 14 percent slower than the nation overall.<sup>98</sup>

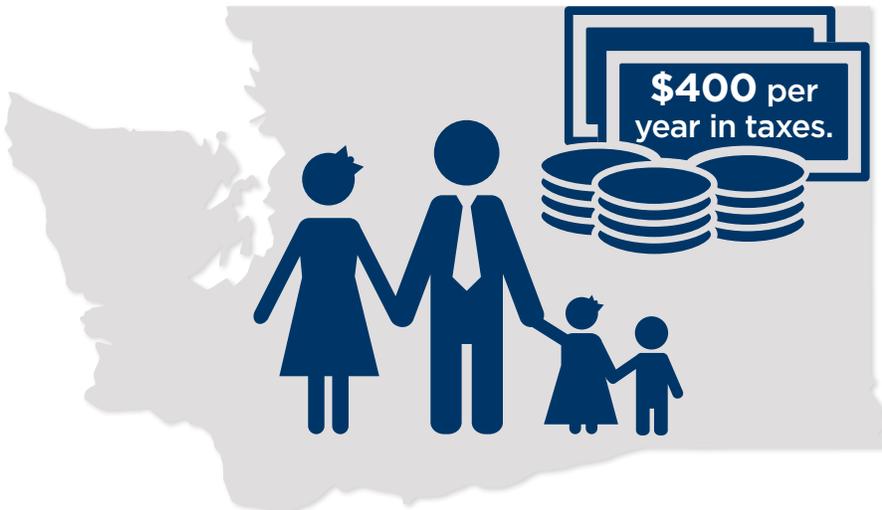
With zero state support, the travel industry has tried to fill the void by creating the Washington Tourism Alliance (WTA) – a group formed by industry stakeholders to keep alive some critical tourism programs. The WTA has been able to keep the state’s official travel website, [www.experiencewa.com](http://www.experiencewa.com), and a mobile app, VisitWA, up and running, and continues to publish the Official Washington State Visitors Guide on an annual basis.

Nevertheless, with a WTA budget of just \$481,000, Washington state continues to fall behind other states in the region, which fund tourism budgets ranging from \$10 million to \$60 million.<sup>99</sup>

In order to stay competitive, the support of both the private and public sectors is essential, says WTA Executive Director Louise Stanton-Masten.<sup>100</sup> The WTA is currently working to establish a long-range transition into a sustainable, industry-led and industry-funded tourism promotion organization so that Washington State is marketed in a competitive manner.

Tax revenue generated by out-of-state visitors saves Washington state families approximately \$400 per year in taxes.<sup>101</sup> Yet, those tax savings will decline over time, as competing states invest in travel promotion efforts to seize market share from Washington state. What happened in Connecticut before that state reinstated its promotion program could happen in Washington state: continued loss of visitors, travel spending and tax revenue – at least until political leaders recognize travel promotion generates a positive return on investment.

**Tax generated by out-of-state visitors saves Washington families approximately**



# THE BOTTOM LINE

Legislators and policymakers often face a hard task in balancing the desire for fiscal responsibility with the need to make strategic investments that produce long-term benefits for states and communities. When it comes to investing in travel promotion efforts, however, the decision should not be difficult. Wise investments in travel promotion programs feed a virtuous cycle of economic benefits – growing the number of travelers boosts spending at community businesses, which supports more jobs and increases tax revenue.

The data and case studies in this report yield several clear lessons for state and local government leaders:

- **Travel is a vital contributor toward local communities.** Travel spending not only sustains local jobs and businesses, it represents a critical source of tax revenue for funding local services such as fire and police protection and education. Additionally, it creates an appealing environment to recruit even more travel- and non-travel-related businesses.
- **Investment in travel promotion is crucial to maintaining market share.** Destinations that view travel promotion budgets as easy savings rather than strategic investments pay the price in the self-defeating form of fewer visitors, less travel spending and lower tax revenue.
- **Enhanced travel-related offerings produce dividends for destinations.** Destinations with stronger travel assets and more developed product offerings improve the quality of life for local residents, attract new businesses and skilled employees, and increase the appeal to potential visitors.
- **Brand USA provides important support to state and destination marketing efforts.** For the first time ever, the U.S. has finally joined the competition for highly lucrative international travelers through a promotional program that does not cost U.S. taxpayers a dime. By supporting Brand USA, states and destinations can leverage their own efforts to attract international visitors.



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The U.S. Travel Association is the national, non-profit organization representing all components of the travel industry that generates \$2.0 trillion in economic output. It is the voice for the collective interests of the U.S. travel industry and the association's more than 1,300 member organizations. U.S. Travel's mission is to increase travel to and within the United States. U.S. Travel is proud to be a partner in travel and payments with American Express®. For more information, visit [USTravel.org](http://USTravel.org) or [traveleffect.com](http://traveleffect.com).

