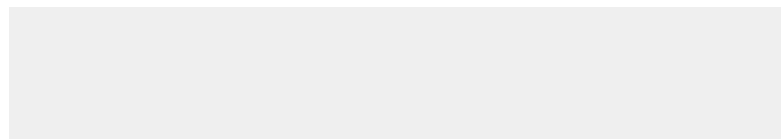


# 2020



# AT&T DIRECT REPORT

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# EXECUTIVE SUMMARY



## SITUATION

The purpose of this report is to identify key marketing strategies for AT&T Direct, AT&T's international phone service. AT&T Direct is the global market leader in international phone services, but the sheer size and profitability of the market necessitate a concentrated effort on top-of-mind brand awareness, especially considering forecasted shifts in the market (like the predicted 70% growth in Asia/ Pacific region tourism over the next five years). AT&T must market to customers by traditional print and physical media, but should focus efforts on locations like airports and popular tourist destinations where the largest potential customer share can be captured.

One of AT&T Direct's primary benefits is its ease-of-use— it's extremely accessible from virtually any phone by dialing a country's access code. However, despite best efforts to keep the brand top-of-mind, some potential customers aren't aware of AT&T Direct or will use whatever service is the first option. To address this challenge, AT&T should partner with hotels and local phone telecom providers to display the country access code near handsets and establish a preferred, revenue-sharing partnership that local servicepeople would recommend to customers.

## SEGMENTS

The primary target customers are traveling businesspeople, American expatriates, study abroad students, military personnel, and tourists, all of whom would be using AT&T Direct to call the United States from abroad. American consumers are brand-loyal. In fact, 72% of business travelers report that earning reward points is "important" or "critical" to their travel purchase decisions. To capitalize on this brand loyalty, and to build its own, AT&T should partner with existing rewards programs like Delta SkyMiles and Marriott Bonvoy. In this partnership, customers would be able to earn reward points with either loyalty program by purchasing AT&T Direct with currency. Additionally, customers could redeem their loyalty points to make AT&T Direct calls.

## CHANNEL PARTNERS

Marketing spend will be allocated by region, focusing on four key channel partners: Delta Airlines, the USO, Marriott Hotels, and state-sponsored tourism agencies. The tactics laid out in this report vary by region, channel, and buyer persona, but focus on three primary objectives: increasing top-of-mind brand awareness, reducing friction to purchase, and incentivizing brand loyalty.



## BUDGET ALLOCATION

SEGMENT	SEGMENT ALLOCATION*
<b>BUSINESS TRAVELER</b>	<b>\$95</b>
EXPATRIATE	\$32
STUDY ABROAD STUDENTS	\$21.5
MILITARY PERSONNEL	\$21.5
<b>TOURIST</b>	<b>\$80</b>

REGION	REGION ALLOCATION*
<b>HEADQUARTERS</b>	<b>\$100</b>
AMERICAS	\$40
ASIS/PACIFIC	\$50
<b>EMEA</b>	<b>\$60</b>

\*IN MILLIONS

Ultimately, AT&T needs to understand the habits and use-cases of their service to reduce friction to purchase and increase brand loyalty. The majority of the \$250 million budget should be invested in establishing strategic relationships with local partners like state tourism agencies, hotels, and airlines that already serve the target customer. The top two sections/region where budget will be allocated are headquarters and the top two segments inside those regions are traveling businessman and tourist.

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**AT&T HAS \$250 MILLION DOLLARS TO ALLOCATE BETWEEN 3 REGIONS OF THE WORLD AMERICAS, ASIA/PACIFIC, EMEA AND HQ.**



# INTRODUCTION

AT&T Direct is a service that will benefit many US citizens traveling abroad. The AT&T Direct service allows a US citizen to call home internationally with the usage of a particular code that is unique to each individual country. The new service will offer opportunities for AT&T to continue to grow in market share of the telecommunications industry but domestically in the United States and internationally. To best leverage the competitive advantage of the AT&T Direct product, there are five segment groups that have been selected. The five segments that have been selected are travelling businesspeople, expatriates, study abroad students, military personnel, and tourists.

The AT&T Direct initiative has been given a \$250 million marketing budget. This budget will be divided between three different regions of the world and the AT&T headquarters. There are three international regions that have been selected based on geographical location and closer cultural similarities. These regions are the Americas, Asia/Pacific, and EMEA (Europe, Middle East, and Africa).

The \$250 million that has been designated toward the marketing efforts will be allocated between these three regions and AT&T headquarters. The table below shows how the \$250 million will be ultimately allocated between each region and segment.

AT&T DIRECT REGION AND SEGMENT BUDGET BREAKDOWN*					
	HQ	AMERICAS	ASIA/PACIFIC	EMEA	TOTAL SEGMENT
BUSINESS TRAVELER	\$50	\$15	\$20	\$10	<b>\$95</b>
EXPATRIATE	\$5	\$7	\$10	\$10	<b>\$32</b>
STUDY ABROAD STUDENTS	\$5	\$1.5	\$5	\$10	<b>\$21.5</b>
MILITARY PERSONNEL	\$5	\$1.5	\$5	\$10	<b>\$21.5</b>
TOURIST	\$35	\$15	\$10	\$20	<b>\$80</b>
<b>TOTAL REGION</b>	<b>\$100</b>	<b>\$40</b>	<b>\$50</b>	<b>\$60</b>	<b>\$250</b>

\*IN MILLIONS

The report shows how the budget was allocated based on the tactics that were developed with the selected channel partners. All selected channel partners help give exposure and touch points to each of the identified segments. The region and market share of the segment will determine the allocated budget for that specific segment.

## SEGMENTS

### TRAVELING BUSINESS PERSON

For the purposes of this report, “business travelers” are defined as the segment of the population that travels internationally for business at least once a year. Of the \$1.3 trillion global business travel industry, American businesspeople are the second largest market of business travelers in the world (Shaulova, Esther, and Lodovica Biagi). The typical business traveler is a 35-54 year-old married man with an income over \$75,000 a year. Most are managers, technical consultants, or salespeople (Business Traveler Study: American Express Global Business Travel). Typically, they make 5 or more trips per year. To remain connected with clients and their home offices, they communicate frequently by phone, at least 3 times per day for an average of 20 minutes per call (The 2018 Skift Global Business Traveler Report). Business travelers tend to be less price sensitive than the average traveler due to their high income, frequency of trips, and ability, in some cases, to charge expenses to their employers.

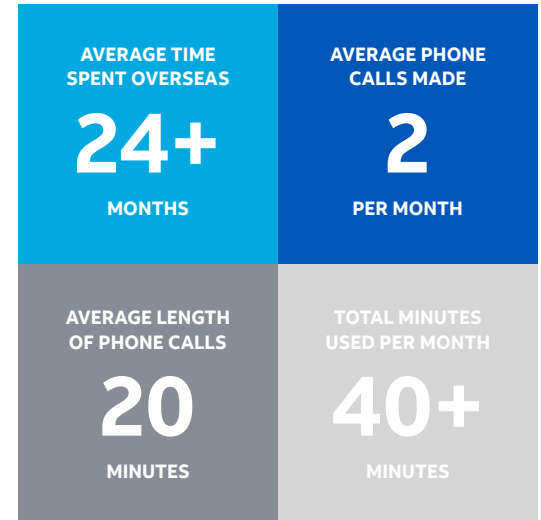
AVERAGE TIME SPENT OVERSEAS <b>15+</b> DAYS PER YEAR	AVERAGE PHONE CALLS MADE <b>5</b> PER DAY
AVERAGE LENGTH OF PHONE CALLS <b>20</b> MINUTES	TOTAL MINUTES USED PER DAY <b>100+</b> MINUTES

Business travelers reach all corners of the world, but common foreign destinations include London, Paris, and Shanghai (Egencia Names 2018 Top Business Travel Destinations). Tokyo, behind New York, has the highest average per diem (expenses paid by an employer) at \$597.28 per day in 2018 (Shaulova, Esther, and Lodovica Biagi). Paris has demonstrated its importance as a travel destination in recent years, increasing air travel arrivals 20% in the year 2018 (Egencia Names 2018 Top Business Travel Destinations).

## EX-PAT

The segment “Ex-pat” is described as someone of United States Citizenship who lives outside the United States for an extended period of time. Most of these individuals have left for career opportunities, with banking and education drawing the most American workers overseas. Over 10% of the ex-pats polled were also retirees who chose to stay overseas.(Statista). On average these individuals are high income earners with a global average annual income of just under 100,000, not including expatriate packages provided by most companies. This is well above the average national income of the united states which is about \$59,000. (“Americans Overseas”).

Over 65% of expatriates are married or have children, therefore, because they are with their immediate family, they do less calling compared to other segments. Their calls are less frequent and are on average more brief than calls of other segments because of the extended duration of their time abroad. They may tend to make a large volume of business-related calls but these will be taken care of by the company and not covered under the AT&T direct service. 10% of expatriates choose to retire to their chosen countries. These retirees represent a small group that does even less frequent calling. They have lived more prolonged periods of time abroad and, on average, spend more time living a local lifestyle and less time calling home.



## STUDY ABROAD STUDENTS

In the 2017 - 2018 school year, 1 in 10 students had the opportunity to study abroad (IIE Research Department). This segment hopes to target the ever-increasing number of American college students who travel abroad to study.



The most recent data from the United States Department of State shows that in 2017, 341,436 students traveled abroad to study (Farmer). This amounted to 10,000 more students than the previous year (a 3.2% increase), and the numbers are projected to continue to grow. The majority of students who chose to study abroad chose Europe as their destination. Only 5 countries: United Kingdom, Italy, Spain, France, and Germany were the destination for 40% of American students going abroad. This makes it simple to choose a location of focus.

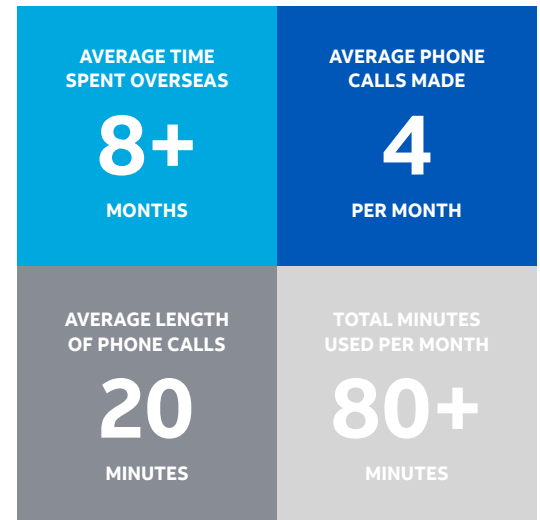
Students have a clear usage behavior when they call home from abroad. The average student makes two phone calls per week and they spend an average time of 15 minutes per phone call. This does not represent a substantial market especially since customer turnover is so high.



## MILITARY PERSONNEL

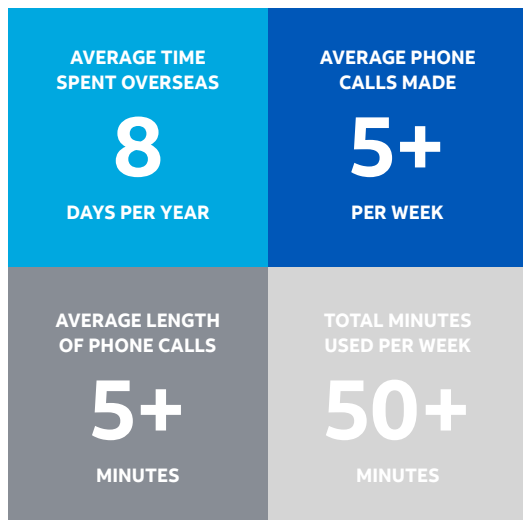
The segment of “Military Personnel” will be defined specifically as all deployed, active duty military personnel stationed overseas. The most recent statistics show that American military forces are spread across 3 general areas. 61,000 troops are stationed in Europe, 25,000 in the Middle East, and 74,000 in Asia. A majority of military personnel deployed are male at 88%. The average income for these soldiers ranges from \$25,000 to \$45,000, and their employment is military. The drive for many people to join the military has to do with a feeling that they are called to serve (Keller). Then following a feeling of needing to serve, many say that they are following the family tradition and enter service for honor and respect (Keller).

Unfortunately, this segment is not the most substantial and the amount of American military individuals deployed is a number that has been in continuous decline. Just in the last five years the number of troops deployed has decreased by over 100,000 (Defense Department).



## TOURISTS

The segment “tourist” is described as individuals or groups who leave the United States and travel outside of the country for leisure, vacation, sightseeing, etc. In 2018 there were 41.77 million (“U.S. Citizen Traffic to Overseas Regions, Canada & Mexico 2018”) United States residents that travelled overseas. These individuals are 18 to 49 years old. The segment includes both males (57%) and females (43%). These individuals have full-time employment, an annual income between \$48,000 to \$102,000, and a bachelor’s degree or higher. They are married or single, 45% and 31% (Shaulova, Esther, and Lodovica Biagi).



According to the State of American Vacation 2018 report, the average time taken for travel and vacation is eight days (State of American Travel 2018). According to a study done by Informat, US citizens make six phone calls on average while in the United States (Burke). With the assumption that while US citizens are on vacation they will not be making six phone calls a day due to price and time, we can assume that a tourist will attempt to reach home every one to two days. Going off these assumptions, we can assume an average number of five to seven phone calls will be made with AT&T Direct while on vacation. We assume these phone calls to be anywhere from five to ten minutes. We predict the average tourist can take 25 to 70 minutes a week speaking to those back in the United States.

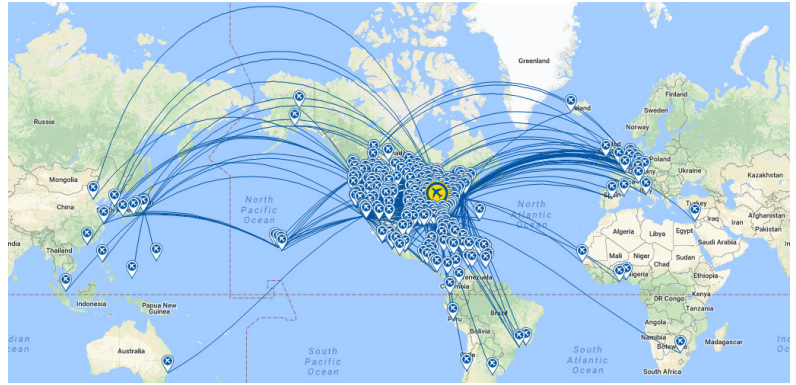
## CHANNEL PARTNERS

### DELTA AIRLINES

Members of each of our five segments will have come in contact with airports and airlines. Business travelers, tourists, and students studying abroad all frequent airports to reach their destinations and to come home. Expatriates also generally travel frequently to nearby countries and travel home once or twice per year, depending on their company. Clearly, strategic placement within airplanes and airports could be instrumental to the project’s success.



Delta Airlines is a key strategic partner for our project. Globally, Delta Airlines is the number one airline based on brand value and size (Brand Directory). Even more importantly, Delta flies to 242 destinations in 60 countries and all six inhabited continents. They serve even more areas of the world if we were to consider some of their international partner airlines as well. Partnering with Delta airlines gives us the ability to spread awareness to all of our selected segments across the world.

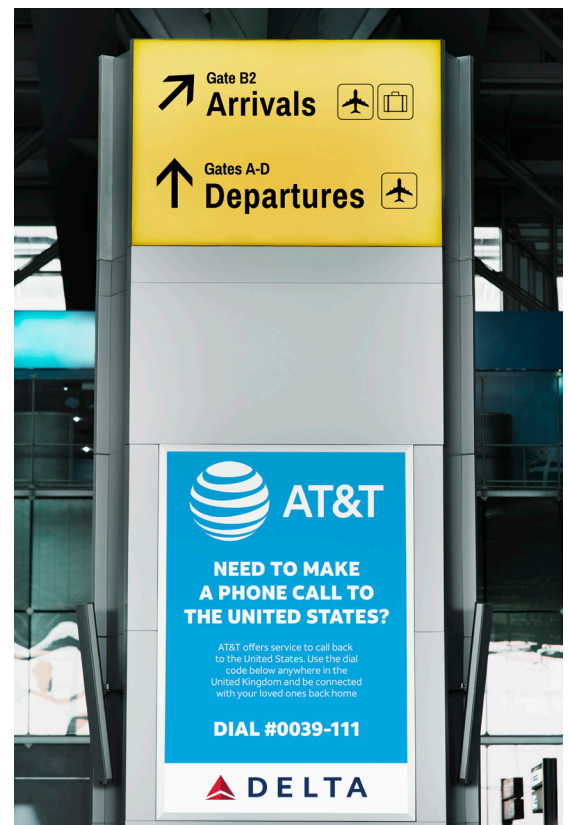
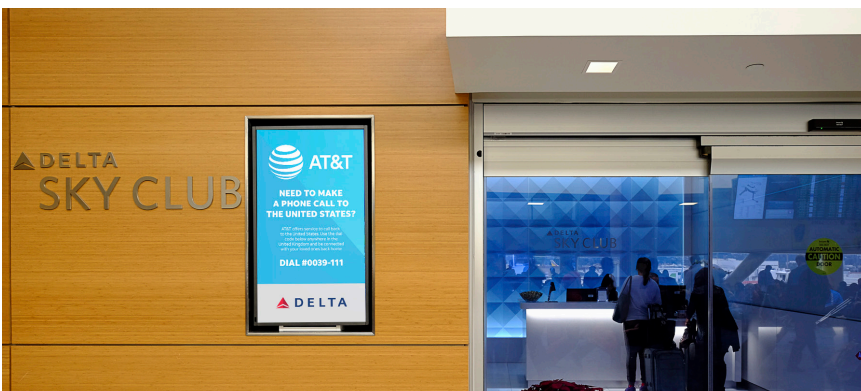


## ADVERTISEMENTS IN DELTA BUSINESS LOUNGE & GATES

Many of our targeted segments travel frequently enough to have rewards points and are in higher income classes. As such, they have access to the business lounges at various airports. AT&T can capitalize on this opportunity by positioning advertisements in these lounges as well as at Delta gates to increase market share with frequent travelers.

AT&T may choose to place advertisements in various strategic locations. These will include a large-style banner or poster in the front of the club, small center-pieces on tables, and instructional pamphlets next to payphones. The most prominent of advertisements will be placed next to the payphones so consumers will have access to the service at the exact time they need it. They will not need to remember the number, making it easier for the consumer, which in turn will increase revenue.

Many travelers call home as soon as they have arrived in a country or before they leave so similar advertisements and pamphlets will be placed at airplane gates. Signs will also be placed on luggage carousels and luggage carts where travelers can see AT&T's service prominently displayed. These advertisements once again provide convenience and no need to plan ahead for the consumer.



## DELTA SKYMILES EXCHANGE

When traveling, Americans gravitate toward familiar brands with which they have existing relationships because they tend to be rewarded by their loyalty programs. For example, 72% of business travelers say earning rewards points is “important” or “critical” when they’re traveling (The 2018 Skift Global Business Traveler Report). AT&T can capitalize on this existing loyalty by partnering with a program like Delta SkyMiles to allow customers to purchase international calling with their miles or to earn miles when they pay for their call in currency. Such a relationship would not only borrow the equity of the Delta brand, but reduce friction to purchase. Costs for AT&T would come from revenue sharing— for example, Delta might get 5% of the revenue generated by each attributed call.

## IN-FLIGHT ADVERTISEMENTS

International flights last several hours and provide many opportunities to reach American travelers. AT&T can feature advertisements on Delta flights through in-flight magazines, in-seat monitors, napkins, or pamphlets prepared specifically for the arrival country.

Napkins and monitor advertisements will feature simple and memorable information that displays the call-back information displayed prominently.



As someone arrives in the country they will be provided pamphlets about the country they have just arrived in. Pamphlets will prominently feature tips for communicating with home which mainly emphasizes our service. AT&T can also feature a memorable advertisement on the back of the pamphlet, advertising the service for people who are not new travelers to the country and providing them details about the benefits of the service.

In-flight advertisements will provide information to a captive audience who are in the same location for an extended period of time. The variety of advertisements will help consumers become familiar with the service. AT&T will cover the cost of advertisements and provide a small profit sharing incentive to Delta for the provided space.





# USO

Potentially one of the most unique markets is the Military segment. Their travel is typically on government transport, and their out of country housing is isolated from civilians. Because of the specificity of this segment and certain restrictions, the greatest way to target them is through a partnership with United Service Organizations (USO). USO is known for the work that they do for military families. From providing ice cream to military family members in airports to putting on concerts overseas, USOs aim is to serve every man, woman, and family member of the United States military.

Partnering with the USO will help us in two key areas: association with a trusted name, and exposure in joyful situations. The USO is a trusted brand in the military, so our advertisements will be hailed along them and earn us more credibility with our target segment. Also because soldiers often associate the USO with fun, exciting, and uplifting experiences, our product will subsume that same association.

## PURCHASABLE CARE PACKAGES INCLUDING AT&T CALL CREDIT

USO not only sends care packages to service men and women overseas, but they also offer care packages for purchase. AT&T can sponsor a specific care package which would include credit to use our product to call home. This tactic will not only increase immediate product usage, but it will get customers familiar with our product.

## ADVERTISEMENTS IN USO AIRPORT LOUNGES

USO provides a great service for troops and their family in the Airport USO lounges. These lounges span the world, but are most prominent in American airports. Signs advertising AT&T will put our company at the top of mind for anyone in the military traveling overseas. This is a great opportunity because it will not only target the deploying troops, but also any family member who is also using the service.

## ADVERTISEMENTS IN CONCERT TICKETS

Most notable among activities the USO puts on for deployed troops are the concerts. These take place at overseas bases and are meant to boost morale of the troops. A concert for a comedian or a rockstar would be a great way to raise awareness for our product. AT&T can advertise directly onto tickets given for the concerts.



## MARRIOTT HOTELS

The single most popular hotel for business travelers is Marriott at 10% (Business Travel in the US - Statista). Because business travelers, under our definition for this report, stay at least one night away from home, most stay in a hotel. By unit, Marriott International is the world's largest chain of hotels, and many of their other brands (including Courtyard and The Ritz Carlton) are top locations for business people, as well. American tourists abroad are drawn to Marriott hotels for their familiarity, consistent quality, and because they may already be rewards members with the US-based family of hotels. A strategic partnership with Marriott allows AT&T access to a consistent flow of potential customers in the two highest-value segments we have identified. Below, we'll lay out a series of tactics that AT&T could implement in Marriott Hotels to increase usage of their AT&T Direct product.

### HANDSET-MOUNTED PLACARD

Every traveler needs a place to sleep at night, and the vast majority will stay in a hotel (The Travel & Tourism Competitiveness Report 2019). Getting the AT&T Direct brand into individual hotel rooms provides a convenient avenue to usage that targets travelers more narrowly than print or other physical ads. AT&T should provide Marriott with phone handsets to put in each guestroom. The handsets would have all the standard functionality of a regular hotel phone, but would also include a branded placard or line item (next to the front desk or room service extensions, for example) that gives instructions for calling internationally with AT&T Direct.



### PREFERRED AGREEMENT WITH SERVICE STAFF

Many travelers rely on the expertise and advice of hotel staff to recommend local services like taxis, restaurants, and tour guides. In a similar fashion, AT&T should develop a preferred relationship with Marriott that directs Marriott staff members to suggest AT&T Direct when asked for advice about calling internationally. As is the case with many of the aforementioned similar relationships, AT&T would share a portion of the revenue with Marriott for the relationship.

### PURCHASE AGREEMENT THROUGH MARRIOTT BONVOY REWARDS

When traveling, Americans gravitate toward familiar brands with which they have existing relationships because they tend to be rewarded by their loyalty programs. For example, 72% of business travelers say earning rewards points is “important” or “critical” when they’re traveling (The 2018 Skift Global Business Traveler Report). AT&T can capitalize on this existing loyalty by partnering with a program like Marriott Bonvoy to allow customers to purchase international calling with reward points or to earn Bonvoy points when they pay for their call in currency. Such a relationship would not only borrow the equity of the Marriott brand, but reduce friction to purchase. Costs for AT&T would come from revenue sharing— for example, Marriott might get 5% of the revenue generated by each attributed call.

## TRAVEL AGENCIES

AT&T can leverage the state/national run travel agencies in each of the three different regions of the most travelled areas. For example, in the EMEA region, London is one of the largest locations with the most traffic flow of citizens of the United States. AT&T would partner with Visit London to have access to their advertising channels. Partnering with these travel agencies would allow AT&T Direct to receive exposures on local transportation, tourist maps, transportation cards, famous tourist sites, and so forth. The following tactics below can be applied to other regions as well. To exemplify how these tactics can be used in certain regions, the following examples will have Visit London as the example channel partner.

## PUBLIC TRANSIT

Leveraging the double decker buses which are famous and common in the United Kingdom, AT&T would partner with Visit London and local advertising agencies to have access to the advertising on these double decker busses. Below is an example of what could be done to help gain exposure and attention for the AT&T Direct service. Advertisements can also be placed in subway and train stations. For example, in London the advertisements can be placed in The Tube.



## FAMOUS & ICONIC LOCATIONS

AT&T can implement a guerrilla technique near or at famous or iconic locations. The technique would consist of AT&T in partnership with Visit London having stations set up at these famous or iconic locations with employees offering to take pictures for free. On the front of the picture with the Visit London logo, and on the back will have the details of AT&T Direct on the back. The risk of this technique acknowledges that not all tourists will be from the United States, however with knowledge that London is the largest travel route from the United States, we can mitigate the risk with having this knowledge.



## TRAVEL BROCHURE & MAPS



AT&T would continue to partner with local travel agencies such as Visit London and have advertisements placed in the tourist maps and travel brochures of what a tourist can do in the city or town they are visiting. AT&T in partnership with Visit London can create their own tourist brochure and map content. An example would be AT&T can create a travel map with the most popular tube routes to get to the most popular locations. In essence, a tube travel cheat sheet.



# BUDGET ALLOCATION

Ultimately, several of our efforts encompass a global partnership with three organizations: Delta Airlines, Marriott Hotels, and USO. AT&T should invest a plurality of their marketing budget in these global partnerships. Strategic partnerships with these organizations represent the most expensive of all of the tactics presented, assuming that AT&T will be investing in a long-term revenue share agreement.

While the Americas do encompass a large share of outbound U.S. travel at 33.7%, the expected share is expected to decrease significantly compared to the rest of the world over the next five years, growing at less than 10% of the Asia/Pacific region's rate (Shaulova, Esther, and Lodovica Biagi). AT&T should adjust the allocation of budget to anticipate this trend and leverage less expensive advertising costs in the Americas, particularly Central and South America.

AT&T DIRECT REGION AND SEGMENT BUDGET BREAKDOWN*					
	HQ	AMERICAS	ASIA/PACIFIC	EMEA	TOTAL SEGMENT
BUSINESS TRAVELER	\$50	\$15	\$20	\$10	<b>\$95</b>
EXPATRIATE	\$5	\$7	\$10	\$10	<b>\$32</b>
STUDY ABROAD STUDENTS	\$5	\$1.5	\$5	\$10	<b>\$21.5</b>
MILITARY PERSONNEL	\$5	\$1.5	\$5	\$10	<b>\$21.5</b>
TOURIST	\$35	\$15	\$10	\$20	<b>\$80</b>
<b>TOTAL REGION</b>	<b>\$100</b>	<b>\$40</b>	<b>\$50</b>	<b>\$60</b>	<b>\$250</b>

\*IN MILLIONS

The Asia/Pacific region has the lowest market share of overseas travel, however the region is expected to grow 68.6% (Shaulova, Esther, and Lodovica Biagi) in travel from US citizens in the next five years. For the expected growth for travel and business in the Asia/Pacific area, an allocated amount of \$50 million will help accomplish the listed tactics given. AT&T needs to budget more than is budgeted for the Americas because the cost of advertising is more expensive in the Asia/Pacific region (Advertising Expenditure Forecasts December 2019).

EMEA receives the highest budget out of the three regions because it has the largest overseas travel market share of 49.3% (Shaulova, Esther, and Lodovica Biagi) of US citizens. AT&T can expect 20+ million (Shaulova, Esther, and Lodovica Biagi) US citizens in all five segments visiting or living in the EMEA region.

Business travelers will be the most profitable segment that will bring in the most revenue. The calling behavior of the business traveler segment will have the individual making more phone calls to both family and business associates. It is just as important to note that business travelers will tend to speak longer on the phone because their work will cover the cost of making phone calls. For these reasons business travelers will be our most focused segment.

Tourists will have the second most allocated budget for the reason that AT&T can assume that the individuals in this segment will make a phone call every one to two days, and will on average be overseas on vacation for eight days. Unlike the business traveler segment, the tourist will have to cover the cost of the phone call which will result in the conversation being shorter.

The study abroad student and military personnel segments have been allocated the same amount of budget for similar reasons. The frequency of the phone calls are not every day but instead spread out evening through months. This segment does receive a larger budget than expatriates for the reason that these individuals in these segments will not be surrounded by family as much will result in more phone calls made.

Expatriates will be allocated the smallest portion of the budget. While expatriates have high buying power and spend extended time overseas, their call volume and length of calls is smaller than other segments. Because of this, the budget allocated to their segment is proportionately smaller to represent a smaller revenue opportunity.

# CONCLUSION

In conclusion, the AT&T product will be most successful with the majority of the budget being allocated to headquarters. As explained above, the global initiatives that will be undertaken with the Delta Airlines and Marriott Hotels will have a trickle effect to all three regions. Although all five segments will be profitable, the segments of traveling business person and tourist are the two segments that receive the largest budget across the three different regions. With AT&T investing in strategic partnerships and focusing on the traveling business person and tourist segment, the AT&T Direct initiative will prove to be successful and profitable.

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