



**Brand USA**

# Market Information

**FRANCE**

# 2020

## About This Guide

*Brand USA is pleased to present this guide in partnership with the U.S. Commercial Service and the National Travel and Tourism Office (NTTO). It includes snapshots of the economy in France along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).*

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# Brand USA



## Who We Are

### Our Mission

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As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 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 to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

### Building on Success

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As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked with more than 900 contributing organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

*Photos: Eiffel Tower, Paris (left); Old City, Bordeaux (right)*



## Our Partnerships

Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

**According to studies by Oxford Economics, over the past seven years, Brand USA's marketing initiatives have helped welcome 7.5 million incremental visitors to the USA, benefiting the U.S. economy with nearly \$55 billion in total economic impact, and supporting more than 50,000 incremental jobs each year.**

## Learn More

For industry or partner information about Brand USA, please visit [TheBrandUSA.com](http://TheBrandUSA.com). For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at [VisitTheUSA.com](http://VisitTheUSA.com).

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## A Message from Christopher L. Thompson



As the destination storytellers for the United States of America, Brand USA helps drive our nation's economy, create jobs, and bring the people of the world closer together. This guide is designed to assist you in generating business from the French outbound-travel sectors. And, while it includes data from our fiscal year 2019, it's important to acknowledge the unprecedented

impact of COVID-19 in 2020. The global pandemic has resulted in tremendous loss for many families and has had a devastating impact on the travel industry. All of this makes Brand USA's work even more critical. We are uniquely positioned to help guide the industry out of this crisis.

France continues to rank as the seventh largest overseas source market for inbound visitation. In 2019, 1.8 million traveled to the United States and spent \$6.47 billion, a two percent increase over 2018. As noted by the U.S. National Travel and Tourism Office, visitors from France want great outdoor adventures; authentic, cultural experiences; and prefer sightseeing when on vacation.

Our forward-thinking marketing approaches allow us to capture the attention of global audiences in new, more compelling ways which ensure the United States stays top-of-mind as an aspirational travel destination. In September 2019, we debuted Brand USA Travel Week Europe. This event provided partners a cost-effective way to directly engage travel trade professionals from 20 European countries, including well-known and emerging markets. During the event, we detailed our *One Europe* strategy which considers the impact of Europe as a whole, with 14.5 million collective visitors to the United States in 2018. This *One Europe* strategy allows us to better leverage and amplify initiatives and partnerships, including those with tour operators, airlines and media who are all buying, reporting and distributing across borders.



Brand USA uses many voices to showcase the diverse people and places across the United States in a way that inspires and encourages wanderlust. In FY2019, Brand USA launched the *United Stories* campaign giving voices to real travel experiences from a variety of perspectives including locals, international visitors, category experts and the creative class. We continued to stream content through the GoUSA TV streaming and YouTube channels, which offer a variety of short, medium, and long-form content about a diversity of travel experiences.

As you consider resources, please know Brand USA has a dedicated travel-trade website which provides a more effective and efficient platform for industry professionals to navigate information about U.S. travel. In addition, please don't hesitate to reach out to our team about U.S. destinations, the opportunities we offer to enhance your marketing efforts, and the most effective ways to inspire travelers to book trips to the USA.

We look forward to working with you in the months ahead to generate business to the United States from France.

Together, we are marketing the USA!

**Christopher L. Thompson**

President & CEO

Brand USA

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## Brand USA Executive & Senior Leadership

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# Market Facts



## Geography

### Area

643,801 km<sup>2</sup>

### Largest Metropolitan Areas



Photos: Vallon des Auffes, Marseille (left); Vineyard in Bordeaux (right)

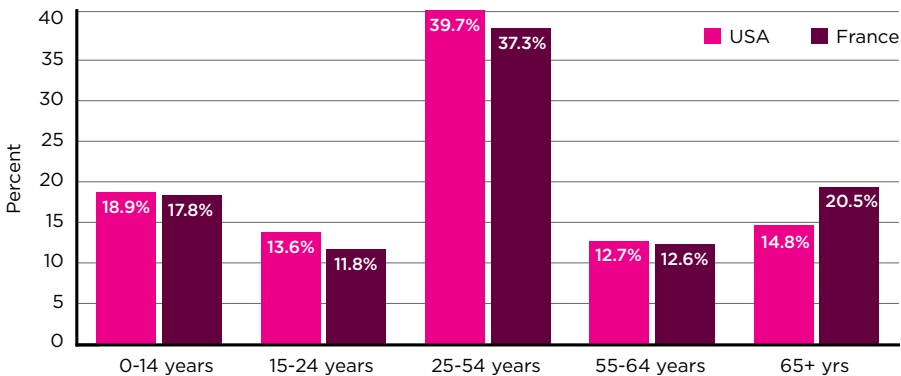
Source: CIA World Factbook 2020

# Demographics

## Population

	France	USA
Population Size	67,063,703	323,730,000
Median Age	40.1 years	37.8 years
Population Growth Rate (2019 est.)	0.4%	0.78%

## Population by Age



# Economy

- **GDP:** \$2.418 trillion (2019)
- **GDP Real Growth Rate:** 1.3% (2019)
- **GDP—Per Capita:** \$36,060 (2019)
- **Unemployment Rate:** 8.1% (2019)
- **Inflation Rate:** 1.1% (2019)

Sources: INSEE 2020; CIA World Factbook 2019



## Vacation Allocation

By law, French citizens receive a minimum of five weeks' paid holiday. For the 11 national holidays, they also may consider the historical "RTT" days—these are additional days off for those who work 39 hours/week in the public sector and for some private companies.

### National Holidays 2020

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- **New Year's Day:** January 1
- **Easter Monday:** April 13
- **Labor Day:** May 1
- **Victory Day:** May 8
- **Ascension Day:** May 21
- **Whit Monday:** June 1
- **Bastille Day:** July 14
- **Assumption Day:** August 15
- **All Saints' Day:** November 1
- **Armistice Day:** November 11
- **Christmas Day:** December 25

Note: With the exception of Easter Monday, these are not sliding dates, meaning that a national holiday during a weekend won't be moved to a weekday.

### Primary Travel Periods 2020

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- **Winter Holidays:** Two weeks in February or March
- **Easter Holidays:** Two weeks in April
- **Summer Holidays:** Six weeks of school holidays in July and August
- **Fall Holidays:** Two weeks in late October
- **Christmas Holidays:** Two weeks in late December

# Travel Trends

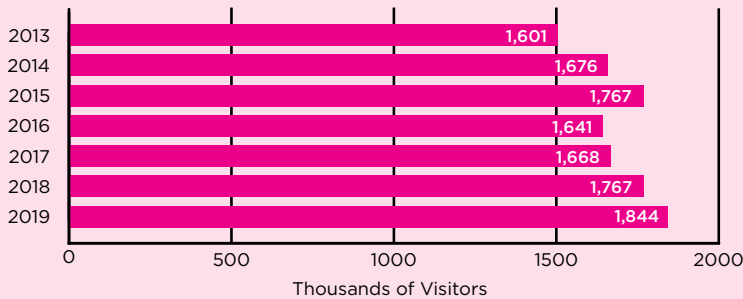


## International Travel Trends

### Spending Trends: Exports (Millions of U.S. Dollars)

	2013	2014	2015	2016	2017	2018	2019
<b>Total Travel &amp; Tourism Exports</b>	\$5,501	\$6,151	\$6,503	\$6,075	\$6,188	\$6,359	\$6,469
<b>Travel Receipts</b>	\$4,219	\$4,723	\$5,119	\$4,816	\$4,923	\$5,132	\$5,263
<b>Passenger Fare Receipts</b>	\$1,282	\$1,428	\$1,384	\$1,259	\$1,265	\$1,227	\$1,206
<b>Change (%) in Total Exports</b>	10	12	6	-7	2	3	2

### Visitation Trends: Arrivals

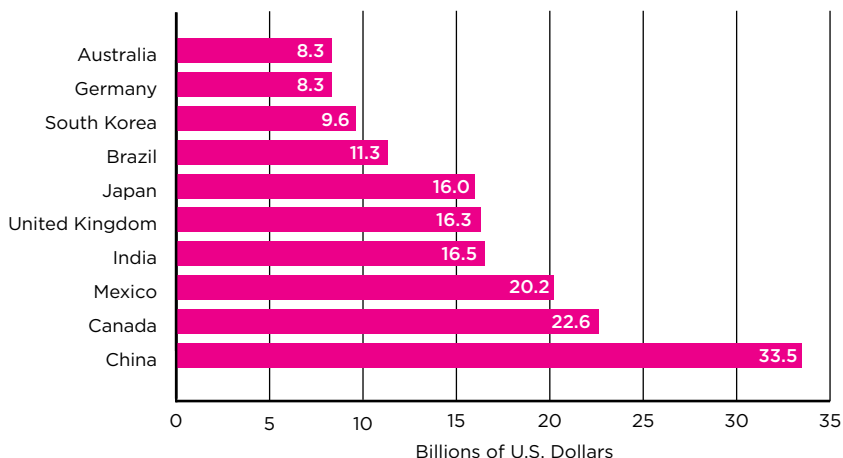


Photos: Mont Saint-Michel, Normandy (left), Place des Jacobins, Lyon (right)  
Source: U.S. Department of Commerce, National Travel and Tourism Office



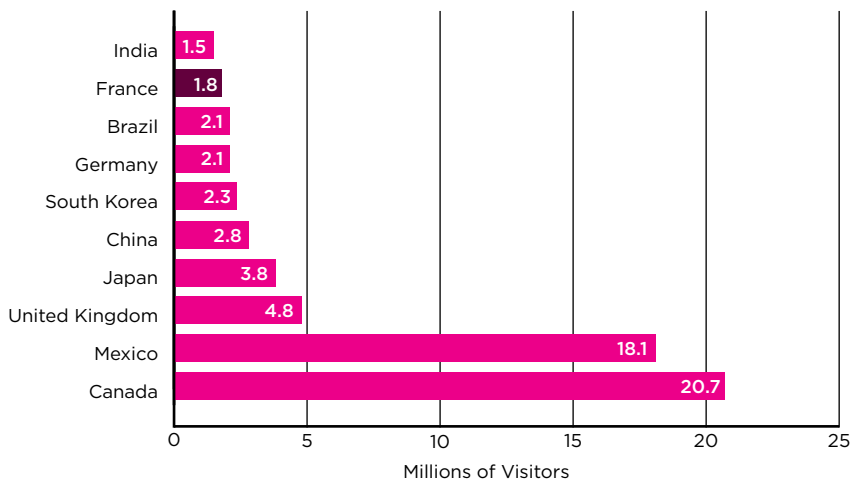
# Inbound Travel Trends

## Visitor Spending



## International Arrivals to the USA

Top 10 Countries Generating Travel to the United States (Long-Haul Arrivals)



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

# Traveler Characteristics

## Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	59.9	65.3
Visit Friends/Relatives	16.5	15.1
Business	13.5	12.0
Convention/Conference/Trade Show	5.8	4.6
Education	3.3	2.3
Religion/Pilgrimages	0.3	0.3
Health Treatment	0.2	0.2
Other	0.4	0.3

## All Purposes of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	69.8	72.6
Visit Friends/Relatives	28.0	26.6
Business	15.4	13.8
Convention/Conference/Trade Show	6.8	6.5
Education	4.7	4.2
Health Treatment	0.6	0.4
Religion/Pilgrimages	0.9	0.4
Other	0.4	0.3
<b>NET PURPOSES OF TRIP</b>		
Leisure & Visit Friends and Relatives	81.2	83.7
Business & Convention	21.2	18.9

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



## Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean Nights)	14.3	15
Length of Stay in USA (Median Nights)	10	10
First International Trip to the USA	27%	23%

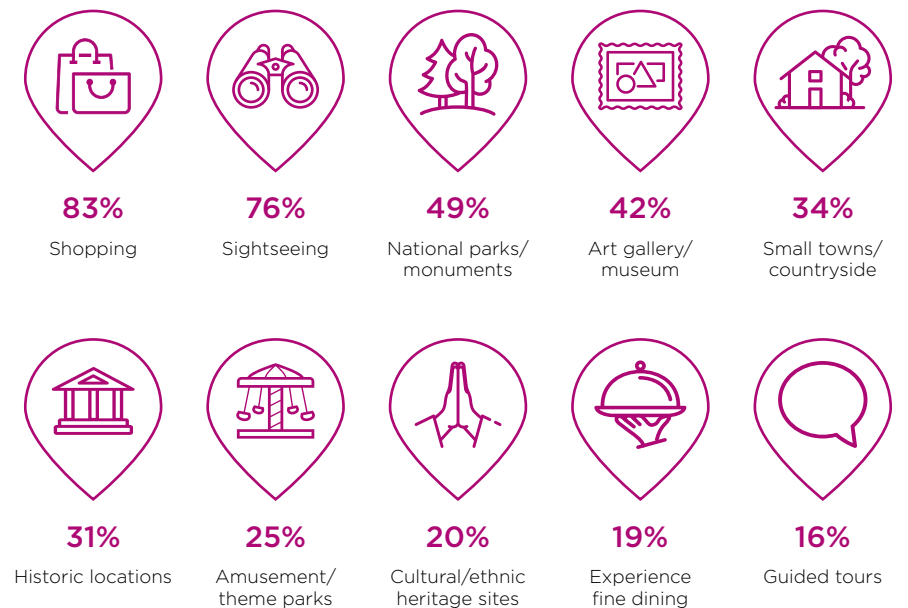
## U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/ Regions	2018 (%)	2019 (%)
<b>REGIONS</b>		
East North Central	5.62	6.25
Middle Atlantic	42.07	42.12
Mountain	16.09	14.50
Pacific	28.28	26.14
South Atlantic	21.53	24.1
<b>STATES/TERRITORIES</b>		
New York	40.32	40.07
Arizona	8.18	6.8
Nevada	13.59	10.63
California	26.75	24.83
Florida	13.94	16.08
<b>CITIES</b>		
New York City	40.13	39.76
Las Vegas	13.48	10.63
Los Angeles	17.71	15.27
San Francisco	16.59	14.45
Miami	10.70	13.05

## Transportation Used in the USA



## Activity Participation While in the USA



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



# Air Travel Information



Air travel to the USA from France has seen drastic changes in recent years, with newcomers breaking into the market with lower priced fares, such as Norwegian, Level, French Bee, and Corsair. U.S. destinations have become more accessible to French travelers, making way for shorter trips—on the East Coast especially—and easier connections.

The strong alliance between Air France, KLM, and Delta has recently been reinforced with Virgin, enabling French travelers to use London-Heathrow as an additional airline hub to Paris-CDG and Amsterdam-Schipol. Air France-KLM's CEO, Benjamin Smith, made the United States a priority of the company's development. During the COVID-19 crisis, Air France boosted the flight capacity to the USA.

Airlines are key in a disintermediated market such as France. The airline development is impressive. There were more new air routes to the USA inaugurated in France in recent years than to any other country (Indianapolis and Denver in 2018, Air France's direct flight to Dallas in 2019).

However, the recent airline struggles during the COVID-19 crisis may change the way flight routes develop in the future, looking for optimizations on existing routes instead of new openings.

## Non-Stop Flights from France to the USA

Airline	Flights From	Flights To	Frequency (week)
Air France	Paris (CDG)	Atlanta (ATL)	14 (2 daily)
Air France	Paris (CDG)	Boston (BOS)	7 (daily)
Air France	Paris (CDG)	Chicago (ORD)	5
Air France	Paris (CDG)	Dallas (DFW)	7 (daily)
Air France	Paris (CDG)	Detroit (DTW)	7 (daily)
Air France	Paris (CDG)	Houston (IAH)	7 (daily)
Air France	Paris (CDG)	Los Angeles (LAX)	13
Air France	Paris (CDG)	Miami (MIA)	7 (daily)
Air France	Paris (CDG)	New York (JFK)	28 (4 daily)
Air France	Paris (CDG)	San Francisco (SFO)	7 (daily)
Air France	Paris (CDG)	Seattle (SEA)	3
Air France	Paris (CDG)	Washington, DC (IAD)	11
Air France	Paris (ORY)	New York (JFK)	7 (daily)
Air Tahiti Nui	Paris (CDG)	Los Angeles (LAX)	4
American Airlines	Paris (CDG)	Charlotte (CLT)	7 (daily) April-October
American Airlines	Paris (CDG)	Chicago (ORD)	7 (daily)
American Airlines	Paris (CDG)	Dallas (DFW)	7 (daily) June-October, additional daily flight
American Airlines	Paris (CDG)	Miami (MIA)	7 (daily)
American Airlines	Paris (CDG)	New York (JFK)	7 (daily)
American Airlines	Paris (CDG)	Philadelphia (PHL)	7 (daily)
Corsair International	Paris (CDG)	Newark (EWR)	7 (daily)
Corsair International	Paris (ORY)	Miami (MIA)	4
Delta Airlines	Nice (NCE)	New York (JFK)	7 (daily)
Delta Airlines	Paris (CDG)	Atlanta (ATL)	14 (2 daily)
Delta Airlines	Paris (CDG)	Boston (BOS)	14 (2 daily)
Delta Airlines	Paris (CDG)	Cincinnati (CVG)	7 (daily)
Delta Airlines	Paris (CDG)	Detroit (DTW)	14 (2 daily)
Delta Airlines	Paris (CDG)	Indianapolis (IND)	7 (daily)
Delta Airlines	Paris (CDG)	Los Angeles (LAX)	7 (daily)
Delta Airlines	Paris (CDG)	Minneapolis (MSP)	7 (daily)

*Flights have been affected by COVID-19.*



Airline	Flights From	Flights To	Frequency (week)
Delta Airlines	Paris (CDG)	New York (JFK)	7 (daily)
Delta Airlines	Paris (CDG)	Raleigh (RDU)	7 (daily)
Delta Airlines	Paris (CDG)	Salt Lake City (SLC)	7 (daily)
Delta Airlines	Paris (CDG)	Seattle (SEA)	7 (daily)
French Bee	Paris (ORY)	Newark (EWR)	7 (daily)
French Bee	Paris (ORY)	San Francisco (SFO)	3
La Compagnie	Nice (NCE)	Newark (EWR)	5
La Compagnie	Paris (CDG)	Newark (EWR)	7 (daily)
Level	Paris (ORY)	Newark (EWR)	4
Norwegian Air	Paris (CDG)	Austin (AUS)	3
Norwegian Air	Paris (CDG)	Boston (BOS)	5, April-October
Norwegian Air	Paris (CDG)	Chicago (ORD)	5, April-October
Norwegian Air	Paris (CDG)	Denver (DEN)	4, April-October
Norwegian Air	Paris (CDG)	Fort Lauderdale (FLL)	3
Norwegian Air	Paris (CDG)	Los Angeles (LAX)	10
Norwegian Air	Paris (CDG)	New York (JFK)	9
Norwegian Air	Paris (CDG)	Orlando (MCO)	2
Norwegian Air	Paris (CDG)	San Francisco (SFO)	3
United Airlines	Nice (NCE)	Newark (EWR)	7 (daily)
United Airlines	Paris (CDG)	Chicago (ORD)	7 (daily)
United Airlines	Paris (CDG)	Newark (EWR)	7 (daily) May-October, additional daily flight
United Airlines	Paris (CDG)	San Francisco (SFO)	7 (daily) April-October
United Airlines	Paris (CDG)	Washington, DC (IAD)	7 (daily)

Flights have been affected by COVID-19.

# Market Snapshot



## The Importance of Leisure in the French Market

The French are among those with the most time off in Europe—a minimum of five weeks of paid holiday, by law, 11 national holidays, and “RTT” days (additional days off) depending on the industry in which they work.

As such, the holiday departure rate has increased consistently since 2010, reaching an average departure rate of 62 percent in 2016, and 86 percent for households with the highest incomes.

France’s economic and security context explain such high percentages. The high level of terrorism in France and the numerous social riots against reforms (e.g., the yellow vests protests, a national strike against the national pension reform) play a part in the French considering travel abroad. Travel trend experts point out that “traveling is a therapy,” and this has never been so true. French travel to recharge batteries, gather with family, and take a break from their anxious daily lives.

The travel decision maker’s primary considerations include:

- The cost of the trip (USD/EUR currency)
- The destination’s weather
- The level of security and threats

French people also look for:

- Great outdoors adventures
- Authenticity
- Culture and heritage
- Gastronomy



French people look for activities in their holidays to include:

- Sightseeing (77 percent)
- Eating out (4 percent)
- Relaxing (3 percent)
- Entertainment (2 percent)
- Shopping (2 percent)
- Sports (9 percent)

The COVID-19 crisis may have increased the importance of a destination's high security level and low threat level for the French. According to several French media sources, the French are the vast majority (58 percent) of travelers who consider their next holiday destination if it has a health system that follows proper, certified international standards. While the U.S. health system is undoubtedly one of the best of the world, France has a free national healthcare system that makes French travelers perceive the U.S. system as unaffordable. As a result, those who invest in travel insurance before visiting the USA could increase.

French who travel to the USA book an average of five months prior to departure, but this may change after the COVID-19 pandemic hit the market and confinement measures were taken for everyone in the country. Travelers will very likely look for last-minute deals, on OTA platforms in particular.

Ultimately, as the French were quarantined for weeks to protect themselves from COVID-19, it's likely that they will look for experiences fitting their lifestyle and beyond more than ever when it's safe to travel again.

## Bon appétit: An appetite for new destinations—any time of year

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The French love to travel, but the manner in which they do has changed drastically. As such, the French market became an important free independent traveler (FIT) business over the years.

The French now consider any destination in the world, which wasn't the case 10 years ago. They have also begun traveling off the beaten path. The number of destinations that French travelers have planned or explored in their lives has drastically increased. The top 10 “favorite long-haul destinations of French travelers” is much different than 10 years ago, with better volumes.

*Sources: Visit USA France; Les Entreprises du Voyages; TourHebdo*

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As a result, traveling habits also evolved with more off-season travel as Asian, South American, and Middle Eastern destinations are seeing more French travelers during the fall and winter. All destinations are becoming more aggressive in terms of marketing efforts, and France remains one of the strongest economies in the world.

Australia and Canada have seen French arrivals increase year after year, breaking records. The cultural connection that Canada has with France, especially Quebec, can explain why. It also shows that French travelers are eager to find historical and cultural elements in their travels and like to immerse themselves in the culture—for instance, participating in local activities that make them feel unique.

French are interested in the USA's great outdoors. And while Western itineraries (including national parks) show them some U.S. outdoor destinations, the French may not be aware of all of the opportunities available and could benefit from being steered toward other regions with outdoor destinations and activities, such as the North Pacific and Midwest.

Seventy-three percent of French travelers revisit U.S. destinations, with the top three being: New York City (807,000 visitors in 2018, +5.2 percent); California and West Coast itineraries (473,000 visitors in 2018, +5.2 percent) and Florida (330,000 visitors in 2018). However, reports indicate that the South (Louisiana, Georgia, Mississippi, and Tennessee), Washington, Oregon, Texas, Massachusetts, Pennsylvania, and the District of Columbia are growing in demand.

## The French Revolution: Uncertainty leads the acceleration of the disintermediation

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Before the COVID-19 crisis, France was already shaken up by several social crises. The yellow vests protests became massive—and sometimes violent—protests all over France, spreading uncertainty in the market. A year later, a strike against the national pension reform received massive media coverage as well.

*Source: TourHebdo ; Visit USA France; Les Entreprises du Voyages*



Following these protests, the SETO (Union of Tour Operators in France) announced that its members recorded a drop in sales of 3.7 percent in early 2019. It was hard to recover from this delay in sales according to several TOs (le Quotidien du Tourisme). SETO barely had the time to report that tour operators were finally, but slowly, recovering from these social crises when the COVID-19 outbreak hit the market, thus pausing all destination sales. The French Minister of Economy declared that tour operators should provide vouchers to customers who wished to cancel trips instead of compulsory refunds. Tour operators are still hoping to recover from these challenges, but the biggest one still has to be tackled.

France is the ninth market in terms of arrivals to the USA (2018) and has seen an increase for three years in a row. Nevertheless, out of 1,767,461 French visitors in 2018, about 200,000 passengers went to the USA through traditional TOs (Les Entreprises du Voyage, SETO Association of French tour operators, and internal figures). This means that less than 10 percent of trips to the United States are carried out by tour operators. Interestingly, out of 30 participating SETO tours, the USA remains the number one long-haul package destination for the summer season only. However in the summer of 2019, there were only 27,491 travelers to the USA, down six percent from the previous year.

So, if TOs are struggling to get better numbers, what platform are French travelers using to book trips to their favorite U.S. destinations? They are booking the trips themselves using online travel agencies (OTAs).

With an estimated 70 percent of market share, OTAs are the “Kings of Travels” to the USA from France. In addition to aggressive marketing campaigns, they are assisted by an incredible airlift development in France with new routes opening in 2018 and 2019 from major French players, such as Air France (80 percent of revenue), and European players offering great deals to the USA via their airports (British Airways, Lufthansa, Aer Lingus, and TAP Portugal).

Through this, the OTAs can highlight their dynamic packages and respond to the French need to have everything tailor-made. Newcomers, such as

*Sources: TourHebdo; AirFrance*

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Norwegian, are also reshaping the way travelers consider the USA, with more affordable flights to major destinations.

Benoit Crespin, Director of eDreams Odigeo in France, has seen promising numbers before the COVID-19 crisis in the USA. Until the COVID-19 travel ban was in effect for French travelers, the USA was the OTA's number one long-haul destination.

Travel agents, some backed up by large groups (Marietton now owns Selectour and Havas Voyages) remain solid performers, with more travel agents interested in booking directly with receptive tour operators to meet their clients' high expectations with custom itineraries. Some are even serving as specialists who become tour operators themselves, using the internet as a means of distribution.

Through the years, TOs have had to evolve to respond to these changes. Some have merged into bigger groups (and COVID-19 may lead to more consolidations), embracing tailor-made products with dedicated à la carte services for B2C TOs or personalized itinerary platforms for B2B TOs (escorted tours represent a mere 60,000 people per year). Others focused on the key factor for success: the customer experience.

## Dream Big or Go Home: Requests to experience the extraordinary and live like a local

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French travelers are looking for different and singular experiences. Extraordinary experiences have doubled in TOs' offerings; such TOs and other players like Cheetiz are changing their packages to offer the most original experiences a traveler can have.

These unique expériences, once a niche segment of U.S. travel offerings, is becoming predominant, or something travelers will look for as FIT—for instance, traveling across the United States on a Harley-Davidson motorcycle, renting a Mustang, flying above Devil's Tower, surfing in Los Angeles, swimming with dolphins in the Gulf of Mexico, riding a horse on a ranch, sharing local beers with Americans, or skiing in the mountains. TOs are now

*Sources: Voyageurs du Monde; TourHebdo; AirFrance*





featuring these experience-focused itineraries to stand out and offer added value to customers who may want to see lower prices in OTAs' packages.

On the other hand, some OTAs are changing the way they distribute packages with many activities by promoting flash sales, creating a “fear of missing out” or FOMO effect to make their members feel privileged.

Travelers may also look for experiences that enable them to live like a local or live “the American Dream.” The boom of U.S. specialists in travel agencies made this possible: they can deliver tailored experiences that immerse customers in local cultures. Evaneos has built its brand on this promise.

What used to be escorted tours with big groups—declining in sales and/or not available anymore in France for FIT tours such as Fly and Drives—are now reduced to six- to 12-person groups. Visiteurs and FTI Voyages also announced they will adjust the format of their groups.

## Soft Power, Contents, and Social Media

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The need for experiences has seen an extraordinary increase due to social media. These stories to share enable travelers to present themselves as strong individuals. French travelers want to experience something they will remember forever, and while a simple road trip through the USA is—and will always be—memorable, the USA can offer more in its unexplored regions.

Social media and social travel play major roles in future travel, and social and sustainable travel remains a leading trend. No trip is complete without staying connected and updated. Sharing experiences is key to satisfaction and selection. Travel is essentially about connecting places, people, experiences, and memories. And technology brings all of this together. In fact, 23 percent of French travelers said that social media influenced them in choosing their next travel destination—and 29 percent said it affected their hotel selection. For 18- to 24-year-olds, these figures skyrocket to 48 percent.

Influencers showcase destinations differently now. With affiliation to travel trade companies, they can test and approve new itineraries and products,

*Sources: Voyageurs du Monde; Expedia; Next Content 2018; ARCEP 2019*

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creating a partnership with a TO or an OTA and participating directly in their marketing efforts. Some travel with members of their community, winners of a contest or guests, and through better storytelling and sophisticated concepts, showcase the assets of a destination like never before.

The American music industry, Hollywood movie hits, or “binge watch” shows are a major influence for French travelers who enjoy them. Content shot in the USA also generates attractiveness. Stephen King books, the Marvel movies, the latest *Late Late Show with James Corden* buzz in LA, or such shows as *Friends*, *Stranger Things*, *Westworld*, *True Detective*, *Breaking Bad*, and *Keeping Up with the Kardashians* help to reinforce the United States' soft power and offer hints about what French travelers are looking for. In fact, Netflix now represents 23 percent of Internet traffic in France.

The Internet, smartphones, social media, blogs, and videos have redesigned the entire travel industry and the travel experience itself. Technology has helped make the travel experience begin from the moment that a person has the aspiration to go somewhere. Even further, it helped create the aspiration itself. Thousands of blogs, vlogs, and social media accounts dedicated to travel made this happen. This is the moment to embrace technology as the medium that leads aspiring travelers to the USA, generating better feedback and improved visibility.

Sources: Expedia; Next Content 2018; ARCEP 2019

# Brand USA Resources



## Online Channels

### Digital Marketing/Social Media

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The majority of the USA Campaigns are driven by digital marketing strategies to engage, inspire, and prompt international travelers to visit the United States. A variety of channels and methods are used, including:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Rich media
- Targeted advertising

### Proprietary Consumer Website Platforms

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Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which includes a global site in English plus in-language sites in most markets where Brand USA markets the United States to international travelers
- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States

*Photos: Le Panier Quarter, Marseille (left); Avignon (right)*

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## Social Media Channels

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In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles are used for global, consumer-facing promotions in English:

- **Website:** VisitTheUSA.com
- **Twitter:** @VisitTheUSA
- **Facebook:**  
Facebook.com/VisitTheUSA
- **YouTube:**  
YouTube.com/VisitTheUSA
- **Instagram:** VisitTheUSA

The following campaign hashtags support global and thematic promotions and initiatives:

- **Global:** #VisitTheUSA
- **Great Outdoors:** #OutdoorsUSA
- **Flavors/Culinary:** #TasteUSA
- **Market the Welcome:**  
#USAWelcome
- **Road Trips:** #RoadTripUSA

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in the Digital Channels chart on the following page.



## Digital Channels

Market	URL	Local Tagline	Channels	Hashtag
<b>Australia</b>	VisitTheUSA.com.au	Plan Your USA Trip Now	<a href="#">@VisitTheUSA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAau</a> <a href="#">YouTube.com/VisitTheUSA</a> #VisitTheUSA
<b>Brazil</b>	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	<a href="#">@VisiteOsUSA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisiteOsUSA</a> <a href="#">YouTube.com/VisiteOsUSA</a> #VisiteOsUSA
<b>Canada: English</b>	VisitTheUSA.ca	Plan Your USA Trip Now	<a href="#">@VisitTheUSAcA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAcA</a> <a href="#">YouTube.com/VisitTheUSA</a> #VisitTheUSA
<b>Canada: French</b>	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	<a href="#">@VisitTheUSAcA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAcA</a> <a href="#">YouTube.com/VisitTheUSAFr</a> #VisitTheUSA
<b>Chile</b>	VisitTheUSA.cl	Planifica tu viaje a USA ahora	<a href="#">@VisitTheUSAes</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSACl</a> <a href="#">YouTube.com/VisitTheUSAes</a> #VisitTheUSA
<b>China</b>	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	<p>Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): <a href="http://weibo.com/GoUSACn">http://weibo.com/GoUSACn</a>  Tencent Weibo (Chinese microblogging site): <a href="http://t.qq.com/DiscoverGoUSA">http://t.qq.com/DiscoverGoUSA</a>  Youku (YouTube equivalent): <a href="http://i.youku.com/gousacn">http://i.youku.com/gousacn</a>  Weishi (Vine equivalent): <a href="http://www.weishi.com/u/23484775">http://www.weishi.com/u/23484775</a>  Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only):  美国国家旅游局  Lofter (Photo sharing platform): <a href="http://GoUSA.lofter.com">http://GoUSA.lofter.com</a></p>	#VisitTheUSA
<b>Colombia</b>	VisitTheUSA.co	Planifica tu viaje a USA ahora	<a href="#">@VisitTheUSAes</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSACo</a> <a href="#">YouTube.com/VisitTheUSAes</a> #VisitTheUSA
<b>France</b>	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	<a href="#">@VisitTheUSAFr</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAFr</a> <a href="#">YouTube.com/VisitTheUSAFr</a> #VisitTheUSA
<b>Germany</b>	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	<a href="#">@VisitTheUSA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSADe</a> <a href="#">YouTube.com/VisitTheUSADe</a> #VisitTheUSA
<b>Global</b>	VisitTheUSA.com	Plan Your USA Trip Now	<a href="#">@VisitTheUSA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSA</a> <a href="#">YouTube.com/VisitTheUSA</a> #VisitTheUSA
<b>India</b>	GoUSA.in	Plan Your USA Trip Now	<a href="#">@GoUSAin</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/GoUSAin</a> <a href="#">YouTube.com/GoUSAin</a> #USATrip
<b>Japan</b>	GoUSA.jp	今すぐ USAへの 旅の 計画を	<a href="#">@GoUSAjp</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/GoUSAjp</a> <a href="#">YouTube.com/GoUSAjp</a> アメリカ旅行
<b>Mexico</b>	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	<a href="#">@VisitTheUSAes</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAMx</a> <a href="#">YouTube.com/VisitTheUSAes</a> #VisitTheUSA
<b>Korea</b>	GoUSA.or.kr	지금 USA 여행을 계획해보세요	<a href="#">@GoUSAKr</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/GoUSAKr</a> <a href="#">YouTube.com/GoUSAKr</a> #미국여행
<b>Sweden</b>	VisitTheUSA.se	Plan Your USA Trip Now	<a href="#">@VisitTheUSA</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAse</a> <a href="#">YouTube.com/VisitTheUSA</a> #VisitTheUSA
<b>Taiwan</b>	GoUSA.tw	N/A	N/A	<a href="#">facebook.com/GoUSA.official</a> N/A
<b>United Kingdom</b>	VisitTheUSA.co.uk	Plan Your USA Trip Now	<a href="#">@VisitTheUSAuk</a> <a href="#">@VisitTheUSA</a>	<a href="#">facebook.com/VisitTheUSAuk</a> <a href="#">YouTube.com/VisitTheUSA</a> #VisitTheUSA

# Brand USA Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, Inc. to conduct proprietary consumer research in various international markets. Respondents were recruited from an online panel. For markets beyond North America, the results reflect responses from adults who travel outside of their continent for leisure. The Global Market Intelligence program is designed to gain insight into travelers' perceptions of the USA and its competitors, as well as general travel behaviors and preferences.

## Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=1008).  
Base: France intercontinental travelers.



55%

Local lifestyle



51%

Cultural/  
historical  
attractions



41%

Urban attractions



40%

Dining/  
gastronomy



39%

Ecotourism/  
nature

## Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1044). Base: France intercontinental travelers.

41%

Diverse

28%

Adventurous

27%

Trendy

25%

Forward-  
thinking

22%

Open-minded



## Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday?  
Select all that apply. Base: France intercontinental travelers (N=1008).



**49%**

Websites  
via computer



**35%**

Personal  
recommendations  
from family and  
friends



**29%**

Information in  
printed travel  
guidebooks



**23%**

Websites/  
applications  
via mobile phone

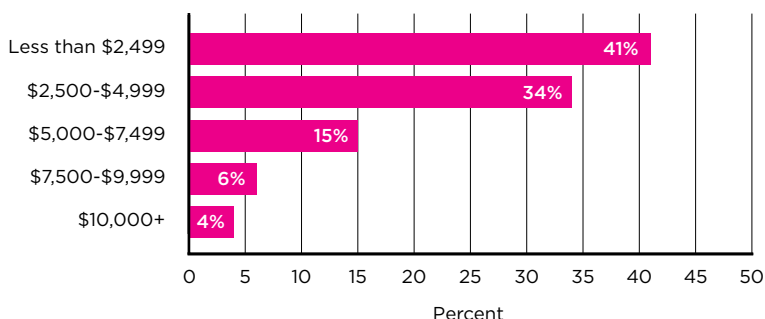


**23%**

Websites/  
applications  
via tablet

## Expected Household Travel Spend for Next Intercontinental Trip

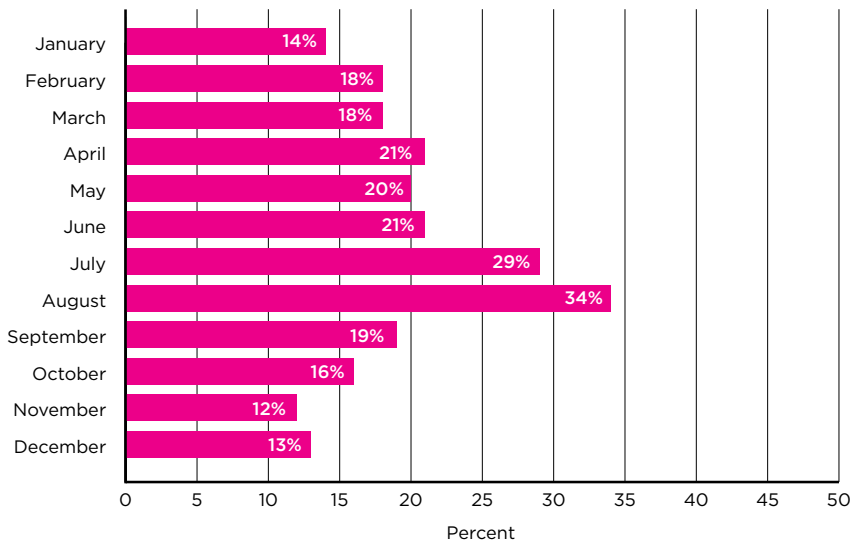
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/ Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.  
Base: France intercontinental travelers (N=1008). (Conversion EUR to USD=1.162).



**Mean: \$3,845 Median: \$3,021**

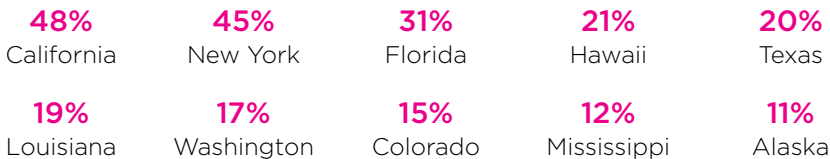
## Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: France intercontinental travelers (N=1008).



## Destination Interest—Top 10 States

Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: France intercontinental travelers with interest in visiting the United States (N=914).

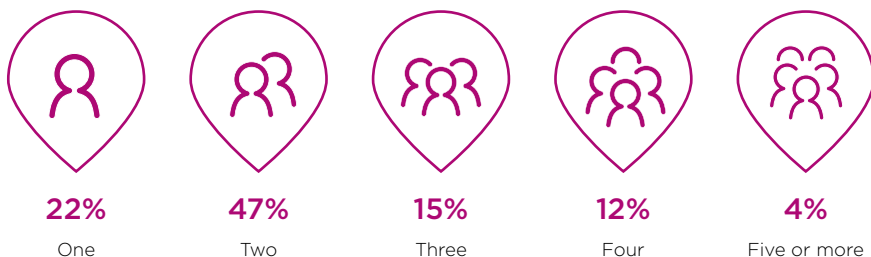






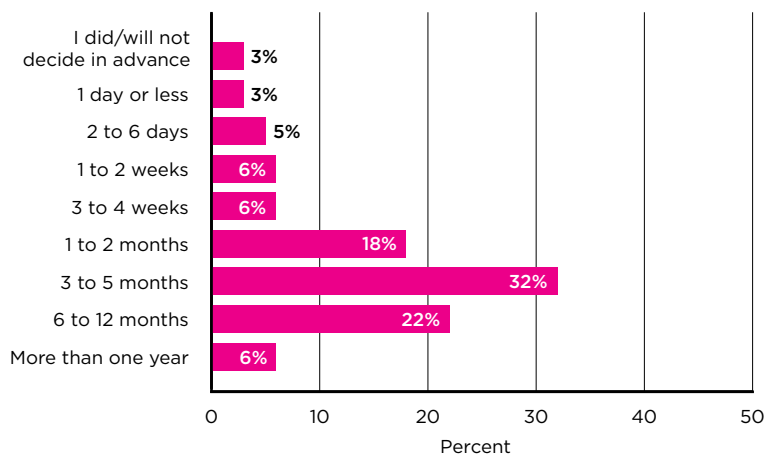
## Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: France intercontinental travelers (N=1008). Note: Totals may not add up to 100% due to rounding.



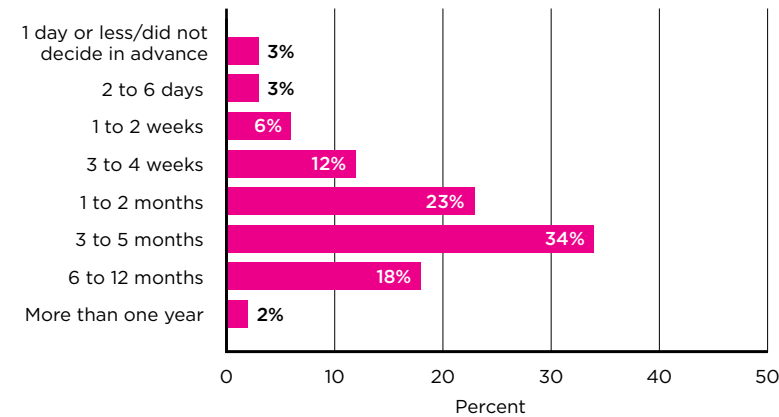
## Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: France intercontinental travelers (N=1008). Note: Totals may not add up to 100% due to rounding.



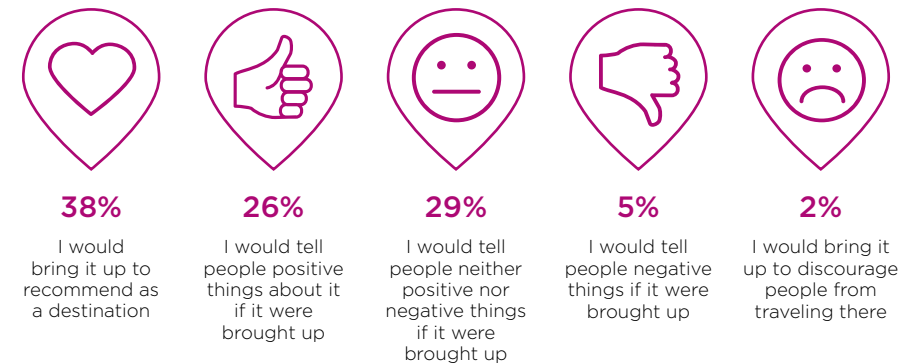
# Air Booking for Next International Trip

Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box. Base: France intercontinental travelers (N=1008). Note: Totals may not add up to 100% due to rounding.



# Net Promoter

Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries? Base: France intercontinental travelers (N=1008). Note: Totals may not add up to 100% due to rounding.

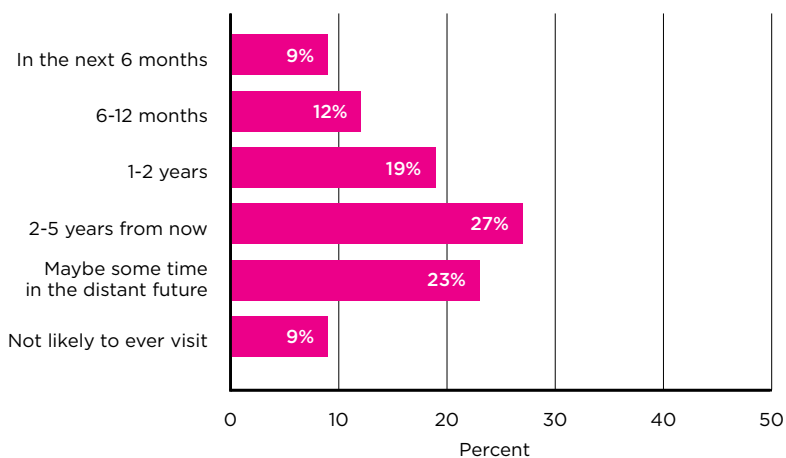


Source: Brand USA Market Intelligence Study 2019



## Likelihood of Travel to the USA

Question: When, if ever, are you likely to visit the following countries? Base: France intercontinental travelers (N=1008).



# Highlights of Success

Over the past seven years, Brand USA's marketing efforts have generated...

**7.5 million**  
incremental visitors



nearly  
**\$25 billion**  
incremental spending

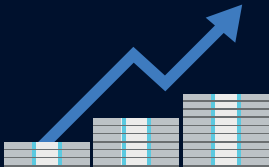


**50,000+**  
incremental jobs  
supported  
each year

**\$7.1 billion**  
federal, state &  
local taxes



nearly  
**\$55 billion**  
total economic  
impact





## Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA's cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets.

# Brand USA Partnerships



## Visit USA Committee, France

### How Brand USA Works with Visit USA Committees

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Brand USA works in collaboration with Visit USA committees around the world to promote the United States as a premier travel destination. These committees organize a wide range of promotional activity, including travel trade shows, workshops, and training for travel agents and tour operators, roadshows with U.S. destinations, and more.

Visit USA committees are generally managed by voluntary members with an interest in promoting and selling travel to the United States. Brand USA collaborates with Visit USA committees and supports activities that align with Brand USA's objectives and marketing strategies. In addition, Brand USA makes use of the in-market expertise of Visit USA committees, both where Brand USA has representation and where it does not.

### Visit USA Committee France

**Geoffrey Duval**

President

**Maureen LaChant**

Vice President

*Infos@office-tourisme-usa.com*

Photos: Villefranche-sur-Mer, Côte d'Azur (left); La Défense Business District, Paris (right)  
Source: CIA World Factbook 2018, unless noted otherwise



## About the U.S. Department of Commerce

Brand USA works in close concert with the U.S. Department of Commerce through the National Travel and Tourism Office (NTTO) and the U.S. Commercial Service.



### The National Travel and Tourism Office (NTTO)

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NTTO is the liaison between Brand USA and the federal government. The office works with Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA's annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal agencies.

More broadly, NTTO creates a positive climate for growth in travel and tourism by reducing institutional barriers to tourism, administers joint marketing efforts, provides official travel and tourism statistics, and coordinates efforts across federal agencies through the Tourism Policy Council. The office works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth through:

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;
- Design and administration of export expansion activities;
- Development and management of tourism policy, strategy and advocacy;
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.

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**Contact:**

**NTTO**

International Trade Administration  
U.S. Department of Commerce  
1401 Constitution Avenue, NW  
Washington, DC 20230  
202.482.0140  
*ntto@trade.gov*

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## The U.S. Commercial Service

Brand USA works closely with the U.S. Commercial Service (USCS) to pursue our mutual objective of promoting the United States as the premier international travel destination.



The USCS is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration. The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States. As America's largest services export, travel and tourism is a key sector for the USCS.

The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers attract international visitors and grow international arrivals. This assistance can include: trade counseling, market research, vetting of potential partners, outreach to wholesale buyers, and support with international sales calls/trade shows/visits. To search for a domestic trade specialist near you, visit [www.export.gov](http://www.export.gov).

### France

#### **Valérie Ferrière**

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7.9.20