



VisitTheUSA.au

Brand USA

Market Information

AUSTRALIA
& NEW ZEALAND

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 economies in Australia and New Zealand 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

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

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: Sydney, Australia (left); Uluru-Kata Tjuta National Park, Australia (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. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at 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 Australia and New Zealand 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.

According to the 2019 data, the United States is the top travel destination for nearly one out of five travelers from Australia and New Zealand. Specifically, Australia ranks as the 10th largest overseas source market for inbound visitation with 1.315 million Australians traveling to the United States in 2019. And, Australians ranked number 9 in the top 10 spend for international visitors to the United States in 2019, spending \$8.3 billion.

Airlift to the United States from Australia and New Zealand is at record highs and fares are competitive and affordable. While leisure trips in 2018 accounted for 82 percent of Aussies travel there is a growing bleisure sector with half of the 13 percent of business travel extending their stay for leisure. And, Aussies are inclined to travel to the United States more than once with a total of 70 percent being repeat visitors, and they stay an average of 19 days and visit an average of two states.

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. 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 Australia and New Zealand.

Together, we are marketing the USA!

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Market Facts



Geography

Area

Australia

7,741,220 km²

New Zealand

268,838 km²

Climate

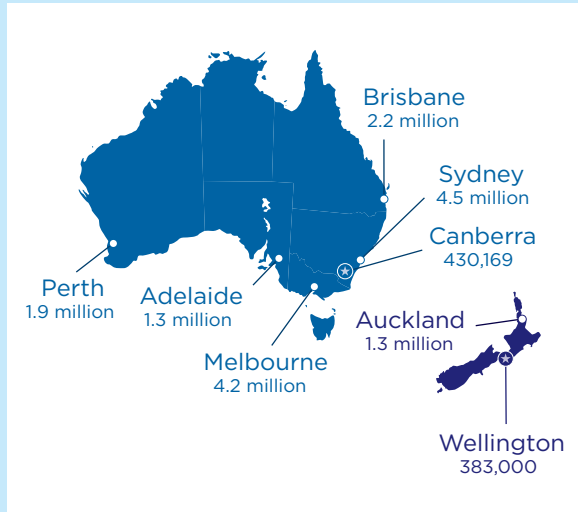
Australia

Generally arid to semiarid; temperate in south and east; tropical in north.

New Zealand

Temperate with sharp regional contrasts.

Largest Metropolitan Areas



Photos: Kaikoura, NZ (left); Gold Coast, Australia (right)

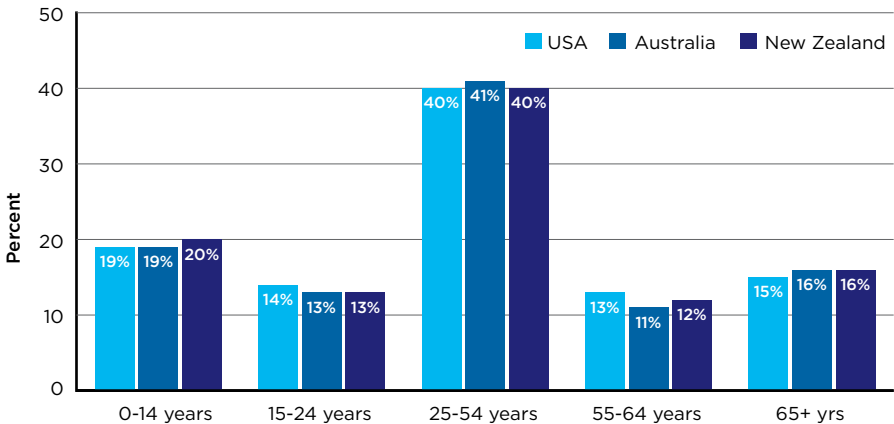
Source: CIA World Factbook 2020

Demographics

Population

	Australia	New Zealand	USA
Population Size (2020 est.)	25,466,459	4,925,477	331,002,651
Median Age	37.5 years	37.2 years	38.2 years
Population Growth Rate (2018 est.)	1.40%	1.44%	0.80%

Population by Age



Economy

Australia

- **GDP:** \$1.432 trillion (2018 est.)
- **GDP Real Growth Rate:** 2.7% (2018/9 est.)
- **GDP—Per Capita:** \$50,400 (2017 est.)
- **Unemployment Rate:** 5.1% (2018/9 est.)
- **Inflation Rate:** 1.9%

Sources: CIA World Factbook 2020, Trading Economics



New Zealand

- **GDP:** \$205 billion (2018 est.)
- **GDP Real Growth Rate:** 2.6% (2018/9 est.)
- **GDP—Per Capita:** \$39,000 (2017 est.)
- **Unemployment Rate:** 3.9% (2018/9 est.)
- **Inflation Rate:** 1.9%

Vacation Allocation

National Public Holidays 2020

Australia

- **New Year's Day:** Wednesday, Jan. 1
- **Australia Day:** Monday, Jan. 27
- **Good Friday:** April 10
- **Easter Monday:** April 13
- **ANZAC Day:** Saturday, April 25
- **Queen's Birthday:** Monday, June 8
- **Labour Day:** Monday, Oct. 5
- **Christmas Day:** Friday, Dec. 25
- **Boxing Day:** Monday, Dec. 28

New Zealand

- **New Year's Day:** Wednesday, Jan. 1
- **Day after New Year's Day:** Thursday, Jan. 2
- **Waitangi Day:** Thursday, Feb. 6
- **Good Friday:** April 10
- **Easter Monday:** April 13
- **ANZAC Day:** Saturday, April 25
- **Queen's Birthday:** Monday, June 1
- **Labour Day:** Monday, Oct. 26
- **Christmas Day:** Friday, Dec. 25
- **Boxing Day:** Monday, Dec. 28

Travel Trends

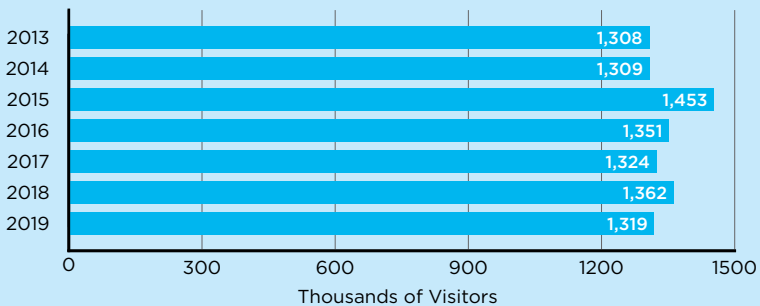


International Travel Trends: Australia

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

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$7,764	\$8,568	\$9,412	\$8,756	\$8,547	\$8,632	\$8,344
Travel Receipts	\$6,986	\$7,706	\$8,571	\$7,962	\$7,745	\$7,817	\$7,543
Passenger Fare Receipts	\$778	\$862	\$841	\$794	\$802	\$815	\$801
Change (%) in Total Exports	22	10	10	-7	-2	1	-3

Visitation Trends: Arrivals



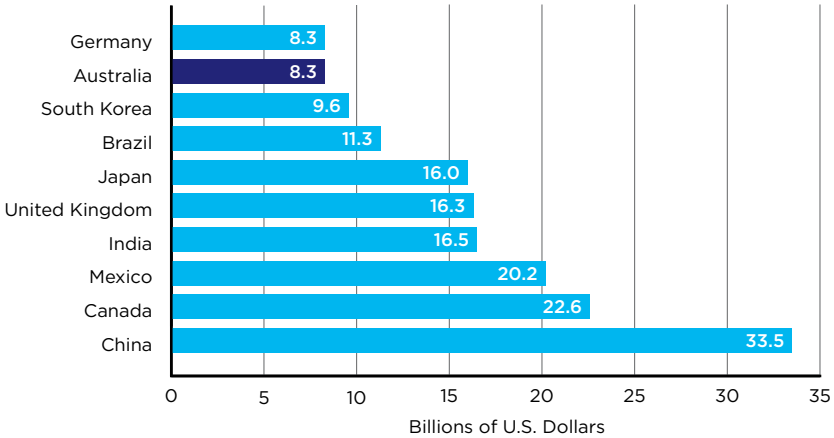
Photos: Melbourne, Australia (left); Wellington, New Zealand (right)

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



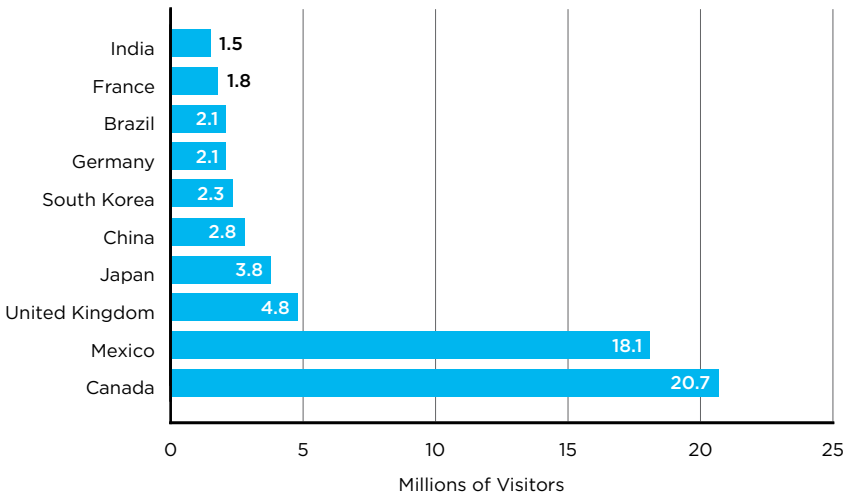
Inbound Travel Trends: Australia

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: Australia

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	73.2	68.6
Visit Friends/Relatives	13.6	19.3
Convention/Conference/Trade Show	4.8	6.1
Business	4.5	4.5
Education	2.3	0.9
Health Treatment	0.4	0.1
Religion/Pilgrimages	0.5	0.1
Other	0.7	0.5

All Purposes of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	82.5	79.4
Visit Friends/Relatives	26.8	33.0
Convention/Conference/Trade Show	7.5	8.6
Business	6.1	7.5
Education	3.7	2.2
Religion/Pilgrimages	1.0	0.5
Health Treatment	0.6	0.1
Other	0.7	0.5
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	91.1	91.1
Business & Convention	11.7	13.5

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)	19.3	18.6
Length of Stay in USA (Median Nights)	14	14
First International Trip to the USA	29.8%	25.4%

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

U.S. Destinations/ Regions	2018 (%)	2019 (%)
REGIONS		
Middle Atlantic	24.52	22.52
Mountain	26.60	22.86
Pacific	47.45	48.20
Pacific Islands	27.29	25.66
South Atlantic	19.70	18.78
West South Central	14.08	11.28
STATES/TERRITORIES		
New York	22.93	21.51
Nevada	19.12	17.16
California	44.54	45.36
Hawaii	27.18	25.55
Florida	11.12	10.31
Texas	8.88	7.98
CITIES		
New York City	22.27	20.79
Las Vegas	18.39	16.64
Los Angeles	31.21	29.93
San Francisco	16.66	15.45
Honolulu & Oahu	23.58	21.01

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

Transportation Used in the USA



55%

Air travel between U.S. cities



38%

Auto, private or company



36%

Ride-sharing service



35%

City subway/ tram/bus



33%

Auto, rented



33%

Taxicab/ limousine

Activity Participation While in the USA



90%

Shopping



86%

Sightseeing



51%

National parks/ monuments



50%

Guided tours



47%

Small towns/ countryside



43%

Historic locations



38%

Art gallery/ museum



31%

Experience fine dining



30%

Amusement/ theme parks



23%

Sporting event



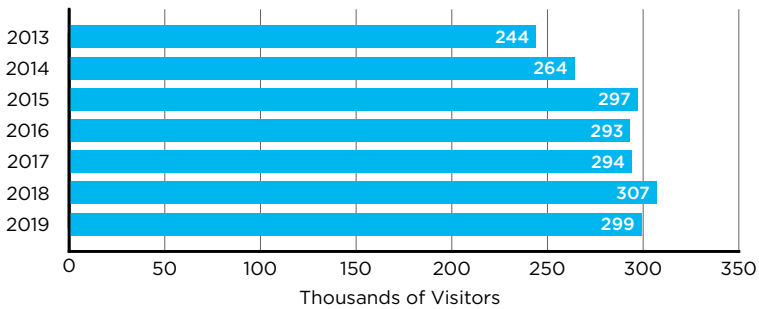
International Travel Trends: New Zealand

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

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$940	\$1,155	\$1,291	\$1,308	\$1,351	\$1,417	OCT
Travel Receipts	\$850	\$1,084	\$1,255	\$1,280	\$1,324	\$1,371	OCT
Passenger Fare Receipts	\$90	\$71	\$36	\$28	\$27	\$46	OCT
Change (%) in Total Exports	11	23	12	1	3	5	OCT

OCT: Data to be released October 2020

Visitation Trends: Arrivals



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

Traveler Characteristics: New Zealand

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	N/A	63.1
Visit Friends/Relatives	N/A	24.0
Convention/Conference/Trade Show	N/A	6.5
Education	N/A	3.5
Business	N/A	2.8
Health Treatment	N/A	0.0
Religion/Pilgrimages	N/A	0.0
Other	N/A	0.1

All Purposes of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	N/A	77.2
Visit Friends/Relatives	N/A	40.1
Convention/Conference/Trade Show	N/A	9.2
Education	N/A	5.2
Business	N/A	4.8
Religion/Pilgrimages	N/A	0.7
Health Treatment	N/A	0.2
Other	N/A	0.3
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	N/A	90.7
Business & Convention	N/A	13.4

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)	N/A	18.2
Length of Stay in USA (Median Nights)	N/A	10
First International Trip to the USA	N/A	19.9%

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

U.S. Destinations/ Regions	2018 (%)	2019 (%)
REGIONS		
Mountain	N/A	21.44
Pacific	N/A	46.36
Pacific Islands	N/A	28.10
STATES/TERRITORIES		
California	N/A	42.61
Hawaii	N/A	27.96
CITIES		
Honolulu & Oahu	N/A	25.97

Transportation Used in the USA



50%

Air travel between U.S. cities



36%

Auto, private or company



34%

City subway/ tram/bus



30%

Auto, rented



24%

Taxicab/ limousine



16%

Bus between cities

Activity Participation While in the USA



90%

Shopping



86%

Sightseeing



49%

National parks/ monuments



46%

Small towns/ countryside



41%

Historic locations



37%

Guided tours



32%

Art gallery/ museum



32%

Experience fine dining



27%

Amusement/ theme parks



9%

Nightclub/ dancing

Air Travel Information



Non-Stop Flights from Australia to the USA

Airline	Flights From	Flights To
American Airlines	Sydney (SYD)	Los Angeles (LAX)
Delta	Sydney (SYD)	Los Angeles (LAX)
Hawaiian Airlines	Brisbane (BNE)	Honolulu (HNL)
Hawaiian Airlines	Sydney (SYD)	Honolulu (HNL)
Jetstar	Melbourne (MEL)	Honolulu (HNL)
Jetstar	Sydney (SYD)	Honolulu (HNL)
Qantas	Brisbane (BNE)	Chicago (ORD) <i>commencing April 2020</i>
Qantas	Brisbane (BNE)	Los Angeles (LAX)
Qantas	Brisbane (BNE)	San Francisco (SFO) <i>commencing Feb 2020</i>
Qantas	Melbourne (MEL)	Los Angeles (LAX)
Qantas	Melbourne (MEL)	San Francisco (SFO)
Qantas	Sydney (SYD)	Dallas Fort Worth (DFW)
Qantas	Sydney (SYD)	Honolulu (HNL)
Qantas	Sydney (SYD)	Los Angeles (LAX)
Qantas	Sydney (SYD)	San Francisco (SFO)
United Airlines	Melbourne (MEL)	Los Angeles (LAX)
United Airlines	Melbourne (MEL)	San Francisco (SFO)
United Airlines	Sydney (SYD)	Houston (IAH)
United Airlines	Sydney (SYD)	Los Angeles (LAX)
United Airlines	Sydney (SYD)	San Francisco (SFO)
Virgin Australia	Brisbane (BNE)	Los Angeles (LAX)
Virgin Australia	Melbourne (MEL)	Los Angeles (LAX)
Virgin Australia	Sydney (SYD)	Los Angeles (LAX)

Photos: Geothermal Springs, Wai-O-Tapu, New Zealand (left); Brisbane, Australia (right)

Non-Stop Flights from New Zealand to the USA

Airline	Flights From	Flights To
Air New Zealand	Auckland (AKL)	Chicago (ORD)
Air New Zealand	Auckland (AKL)	Honolulu (HNL)
Air New Zealand	Auckland (AKL)	Houston (IAH)
Air New Zealand	Auckland (AKL)	Los Angeles (LAX)
Air New Zealand	Auckland (AKL)	New York Newark (EWR) <i>commencing Oct 20</i>
Air New Zealand	Auckland (AKL)	San Francisco (SFO)
American Airlines	Auckland (AKL)	Dallas Fort Worth (DFW) <i>commencing Oct 20</i>
American Airlines	Auckland (AKL)	Los Angeles (LAX)
American Airlines	Christchurch (CHC)	Los Angeles (LAX) <i>commencing Oct 20</i>
Hawaiian Airlines	Auckland (AKL)	Honolulu (HNL)
United Airlines	Auckland (AKL)	Chicago (ORD)
United Airlines	Auckland (AKL)	San Francisco (SFO)

The schedules were valid prior to COVID-19. In March 2020, Australian and New Zealand borders were officially closed for six months, other than essential travel. Many flights are on hold temporarily.

Source: Brand USA Proprietary Research

Market Snapshot



Australians and New Zealanders are amongst the most avid per capita international travelers in the world. In 2018, the USA was the number one long-haul destination, a position it has held for many years. Australia ranks as the ninth largest market to the USA for international spending and the 11th largest in terms of visitor numbers.

Repeat visitation is very high, with 72 percent of Australians being repeat travelers to the USA in 2018. They stay an average of 18.7 days, visiting an average of two states. Over the past decade, the spread of states visited has broadened significantly

as Australians become ever more familiar with a diverse range of U.S. destinations, and this increase has proliferated into new ports of entry.

While COVID-19 has decimated Australian and New Zealand travel for the time being, Brand USA's June 2020 global sentiment study showed the Australian market as the most ready to bounce back, from both an economical and attitudinal perspective.

While COVID-19 has decimated Australian and New Zealand travel, Brand USA's June 2020 global sentiment study showed the Australian market as the most ready to bounce back.

Information was valid prior to COVID-19.

Photos: Sydney, Australia (left); Piha Beach, Auckland, New Zealand (right)

Sources: U.S. Department of Commerce, Roy Morgan Single Source Australia, Luxury Escapes Travel 2020 Survey, Phocuswright Market Intelligence Survey for Brand USA 2019.

Travel Markets Summary

Australia and New Zealand remain important markets for inbound travel to the USA. Australians and New Zealanders travel farther, stay longer, and spend more in the United States than many other inbound markets. The average length of stay for Australians is 18.7 days, and the average number of states visited is two. Australians and New Zealanders continue to broaden the range of states visited in the USA as they become increasingly familiar with a more diverse range of U.S. destinations. They are a resilient travel market, and this combined with their increasing propensity to return to the USA makes them a key target despite the challenges of relatively small populations and distance to travel to the USA.

Australia ranks as the ninth largest market for international visitor spend. In 2018, Australians spent USD8.6 billion in the United States.

The Australian economy is softening somewhat with contractions in retail spending, a struggling Australian dollar, and reduced consumer confidence impacted by devastating bushfires, the USA/China trade wars, and uncertainty caused by coronavirus. GDP growth has slowed to 1.8 percent, and the exchange rate has remained relatively weak throughout 2019, averaging around AUD0.68 to USD1.

Despite the economic challenges, the desire to travel internationally continues to be the strongest on record, with an increasing percentage of holidays taken being overseas. Living in remote island nations, Australians and New Zealanders are accustomed to traveling internationally for their vacations.

The other key factor in visitation is in airlift and airfares. Airlift to the USA from Australia and New Zealand is at a record high, and fares continue to be competitive and affordable. The market has become very tactical, with one special fare after another bombarding consumers. New routes to launch in 2020 include Brisbane to San Francisco, Brisbane to Chicago, Christchurch to Los Angeles, Auckland to New York, and Auckland to Dallas Fort Worth. These will all continue to provide Australians and New Zealanders with an increased number of options for travelling to the USA.

Sources: U.S. Department of Commerce, Roy Morgan Single Source Australia, Luxury Escapes Travel 2020 Survey, Phocuswright Market Intelligence Survey for Brand USA 2019.



However, it's not just the USA that has benefited from new airlift. New aircraft technology is opening up the possibility of non-stop airlift to many competitor destinations as well, and the new normal in Australia and New Zealand is an increased offering of accessible, affordable destinations. The USA must continue to work hard to stay top of mind.

Australians and New Zealanders travel to the United States primarily for leisure purposes. 82 percent of Australians reported traveling for leisure in 2018. There is a growing leisure market, with 13 percent of travelers from Australia reporting the primary purpose as convention or business and an estimated 47 percent of these extending their stays.

Once in the United States, Australian travelers participate in various leisure activities with shopping and sightseeing (91 percent) at the top of the list. National parks (54 percent), guided tours (48 percent) and small towns/countryside (44 percent) also very popular. In line with the global trend, Australians and New Zealanders prefer authentic experiences that allow them to live like locals and gain an understanding of the countries they visit. Twenty-six percent attended a sporting event during their visit, and over half take a domestic flight within the USA.

Airlift to the USA from Australia and New Zealand is at a record high, and fares continue to be competitive and affordable.

The peak season for U.S. travel by Australians and New Zealanders is May through September and December through January, but with the exception of the low months of February and November, travel demand is flattening out across the seasons as airlines manage their demand and yield with tactical fares across the year.

The top sources for researching holidays are with airlines (47 percent), travel agents offline (41 percent), online travel agencies (OTAs) (35 percent), personal recommendations (31 percent) and travel guides (10 percent).

The dominant national carriers (Qantas in Australia and Air New Zealand in New Zealand) play a very significant role in these markets, as the extensive

Sources: U.S. Department of Commerce, Roy Morgan Single Source Australia, Luxury Escapes Travel 2020 Survey, Phocuswright Market Intelligence Survey for Brand USA 2019.

loyalty programs provide them with deep customer segmentation and insights as well as direct communication channels. This is being used at an increasing level of sophistication in market.

And while bookings are being influenced more by the digital revolution and are becoming ever more fragmented with an increasing number of touchpoints and channels, travel agents continue to play a very significant role, with 43 percent of airline reservations made by a travel agent. Working with, educating, and incentivizing retail agents is a key part of the best practice approach in market. While the home-based travel agent is increasing in prevalence, there continue to be 3,500 retail travel agency locations operating in Australia and over 300 in New Zealand.

Australia's OTA landscape has changed dramatically in recent years, transforming from an uncomplicated air and land model to a number of different types of OTAs with specialized offerings, from value-add bundling to hotel only, tailored touring, cruising, and luxury. Many of them are grappling to find the winning formula for selling the USA, which their clients are telling them they want, but which hasn't worked well with their standard models. As they find solutions to these challenges, the landscape for selling the USA in Australia and New Zealand will continue to change.

With the dominant and ever-increasing role of content in travel promotion, major media houses Ten, Nine, and News have created their own distribution channels or partnered with others to become part of the point of sale.

While 2019 was a very challenging year for them, most of the wholesale distribution within Australia and New Zealand continues to be with the two dominant players; Helloworld (Viva Holidays, Go Holidays, and ReadyRooms) and Flight Centre Travel Group (Infinity Holidays). These brands also dominate in the retail sector. Flight Centre Travel Group has retail brands Flight Centre (700 branded stores), luxury brand Travel Associates (117 stores), Travel Partners (90 stores and 140 mobile agents), and youth brand Universal Traveller (52 stores). Helloworld has retail brands Helloworld (787 branded stores), My Travel Group (1,195 stores), luxury group Magellan (192 stores), and MTA (350 mobile agents).

Sources: U.S. Department of Commerce, Roy Morgan Single Source Australia, Luxury Escapes Travel 2020 Survey, Phocuswright Market Intelligence Survey for Brand USA 2019.



New Developments

As the drive for experiential travel continues, the demand for coach touring has softened, with many of the coach companies introducing tailor-made options, which are becoming more popular than their core offering. As an example, G Adventures launched their tailor-made program in April 2019.

The wholesale market has had a difficult year, with leisure demand with major companies responding with restructures. Helloworld's lease on the "Qantas Holidays" brand expired, and the name has ceased to be used, while in the meantime

Qantas has ramped up their hotel contracting, and appear to be ready to start using this name as soon as their direct-to-consumer strategy ramps up. Leading B2B operator Excite Holidays went under in January 2020, leaving a major hole in the B2B competitive landscape.

The OTA landscape continues to evolve, and a number of them are putting their minds to the best options for curating the USA for maximum conversion. In March, bundling OTA Luxury Escapes commenced a significant expansion into the USA. In April, Trip.com (part of C-Trip) launched in Australia, and in 2020 Helloworld's OTA Truly Travel is set to launch.

In October 2019, Qantas undertook test flights between Sydney and New York and will soon make decisions on their next fleet purchases, which may include planes that are able to make this groundbreaking journey. 2020 will see five new routes launching; Brisbane–Chicago, Brisbane–San Francisco, Auckland–New York, Auckland–DFW, and Christchurch–Los Angeles.

The OTA landscape continues to evolve and a number of them are putting their minds to the best options for curating the USA for maximum conversion.

Information was valid prior to COVID-19.

Sources: U.S. Department of Commerce, Roy Morgan Single Source Australia, Luxury Escapes Travel 2020 Survey, Phocuswright Market Intelligence Survey for Brand USA 2019.

Brand USA Resources



Online Channels

Digital Marketing/Social Media

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

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: Karijini National Park, Australia (left); Wellington, New Zealand (right)



Social Media Channels

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

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

GoUSAtv Available on Roku, Apple TV, Amazon Fire, iOS, and Android. Also accessible via GoUSATV.com and YouTube.



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=1007).

Base: Australia intercontinental travelers.



54%

Cultural/historic attractions



51%

Local lifestyle



39%

Shopping



35%

Dining/
gastronomy



34%

Urban attractions

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=1007). Base: Australia intercontinental travelers.

39%

Diverse

33%

Adventurous

30%

Friendly

29%

Arrogant

25%

Energetic

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: Australia intercontinental travelers (N=1007).



58%

Websites via computer



37%

Personal recommendations from family and friends



27%

Websites/applications via mobile phone



22%

Websites/applications via tablet

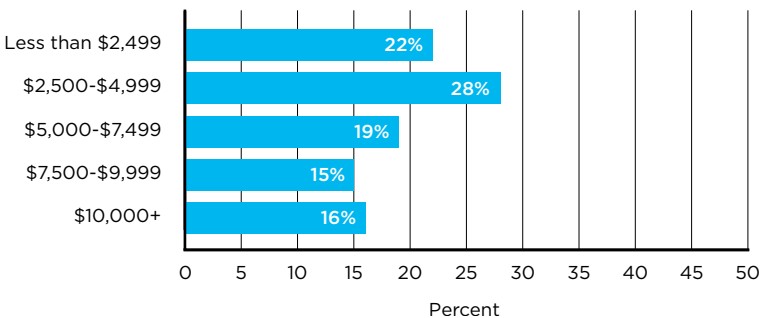


22%

Information in printed travel guidebooks

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: Australia intercontinental travelers (N=1007). (Conversion AUD to USD= 0.752).

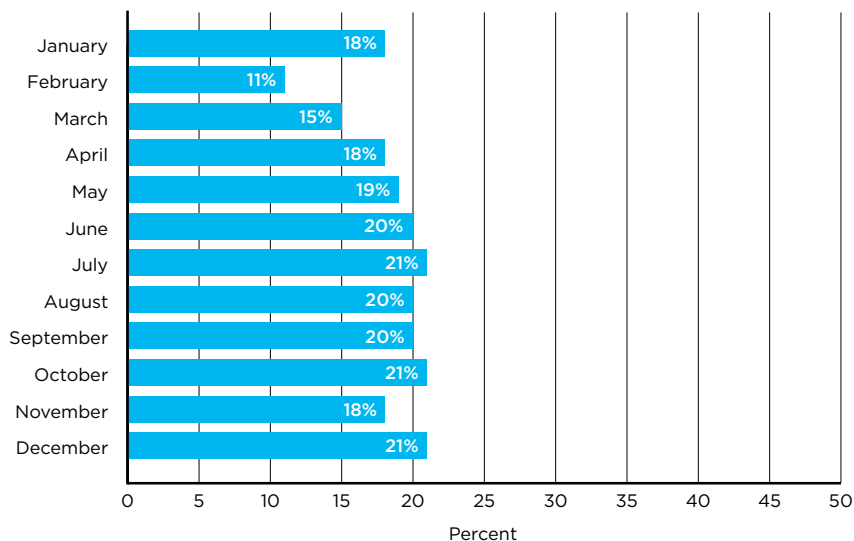


Mean: \$6,608 **Median:** \$5,114



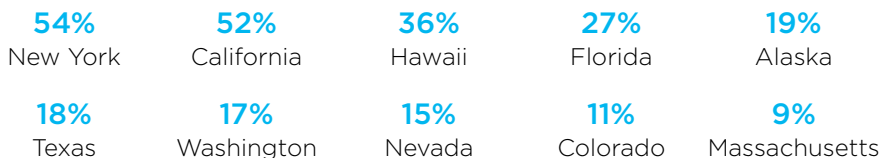
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Australia intercontinental travelers 2019 (N=1007).



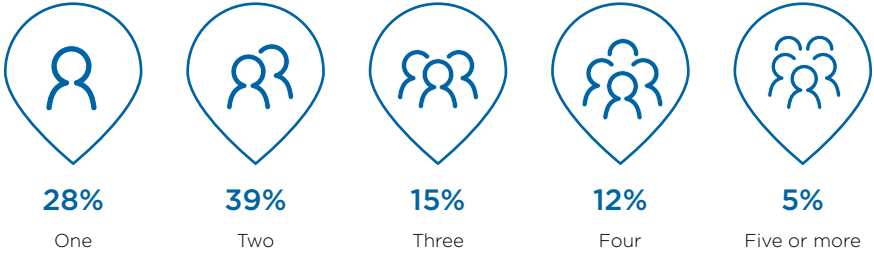
Destination Interest—Top 10 States

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: Australia intercontinental travelers with interest in visiting the United States (N=917).



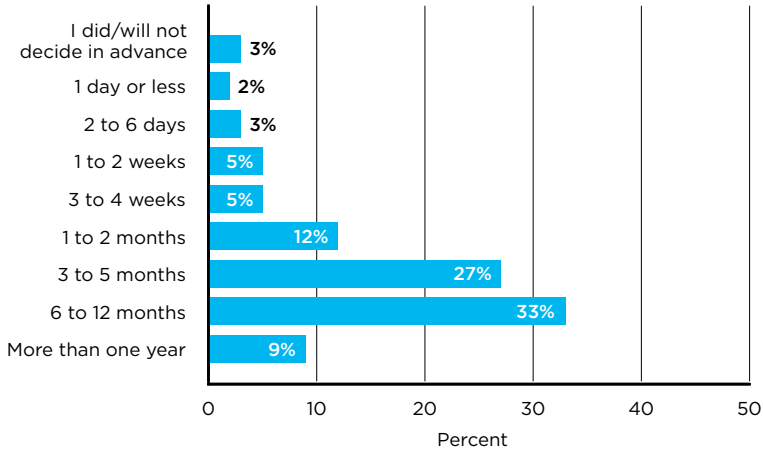
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Australia intercontinental travelers 2019 (N=1007). Note: Totals may not add up to 100% due to rounding.



Destination Decision for Next International Trip

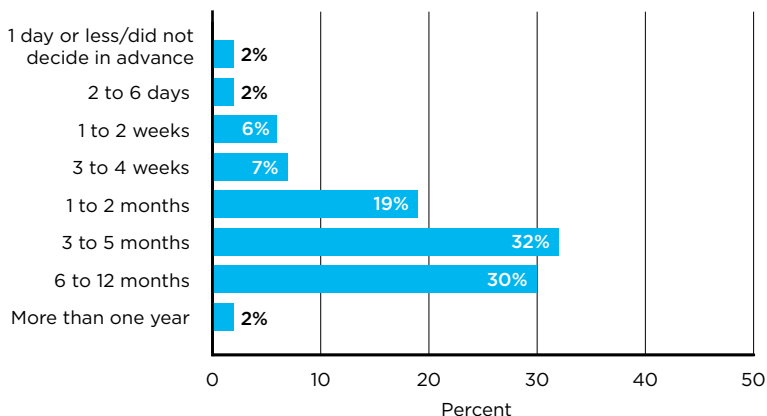
Question: How far in advance of your departure date did/will you decide on the destination? Base: Australia intercontinental travelers 2019 (N=1007). Note: Totals may not add up to 100% due to rounding.





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: Australia intercontinental travelers 2019 (N=1007). 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: Australia intercontinental travelers (N=1007). Note: Totals may not add up to 100% due to rounding.



25%

I would bring it up to recommend as a destination



32%

I would tell people positive things about it if it were brought up



32%

I would tell people neither positive nor negative things if it were brought up



7%

I would tell people negative things if it were brought up

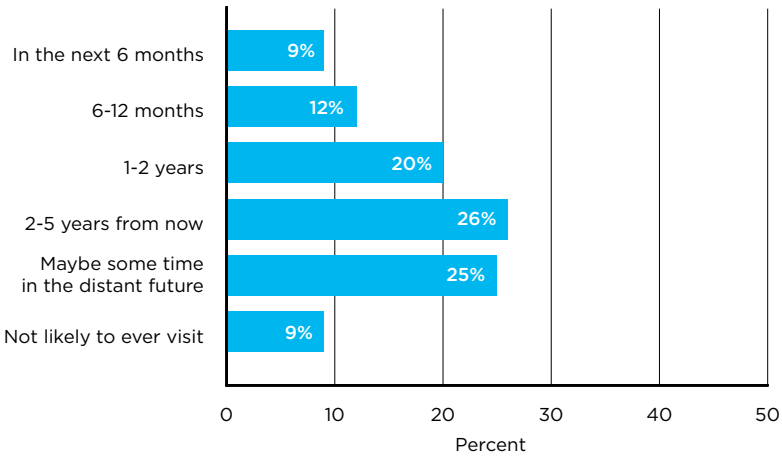


4%

I would bring it up to discourage people from traveling there

Likelihood of Travel to the USA

Question: *When, if ever, are you likely to visit the following countries?* Base: *Australia intercontinental travelers 2019 (N=1007).*





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

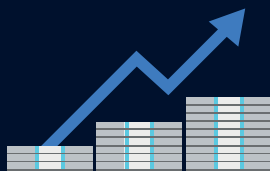


50,000+
incremental jobs
supported
each year

\$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 Committees, Australia & New Zealand

How Brand USA Works with Visit USA Committees

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 Australia

Lucy Rowe

President

Caroline Davidson

Vice President

Admin@VisitUSA.org.au

Visit USA Committee New Zealand

Claire Reynolds

Chair

Leanne Cheesman

Vice Chair

Contact@VisitUSA.co.nz

*Photos: King George River, Kimberley, Australia (left); Auckland, New Zealand (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)

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.



Contact:

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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.



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8.3.20