



VisitTheUSA.com

Brand USA

Market Information

ITALY

2020

About This Guide

This market guide includes a snapshot of the economies in Italy, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Brand USA..... 4

Who We Are..... 4

A Message from Christopher L. Thompson 6

Brand USA Executive & Senior Leadership..... 8

Market Facts 9

Geography 9

Demographics 10

Economy 10

Vacation Allocation and National Public Holidays 11

Travel Trends 12

International Travel Trends 12

Traveler Characteristics..... 13

Market Snapshot..... 16

Brand USA Resources 19

Online Channels..... 19

Brand USA Traveler Research..... 22

Highlights of Success..... 28

Brand USA Markets..... 29

Brand USA Partnerships..... 30

Visit USA Committee, Italy 30

About the U.S. Department of Commerce..... 31

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: Milan (left); Venice (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.

Brand USA Headquarters

1725 Eye Street NW
Eighth Floor
Washington, DC 20006 USA

Phone: +1 202.536.2060

Email: info@TheBrandUSA.com

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 Italian 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.

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.

Italy is the 10th largest overseas source market for U.S. visitation with 1.086 million people traveling to the United States in 2019 and spending \$4.32 million. According to the U.S. National Travel and Tourism Office, the top five activities visitors from Italy look for are shopping, sightseeing, exploring national parks, visiting art galleries and museums, and touring small towns.



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 Italy.

Together, we are marketing the USA!

Christopher L. Thompson

President & CEO

Brand USA

Brand USA Executive & Senior Leadership

Christopher L. Thompson

President & CEO

CThompson@TheBrandUSA.com

Thomas Garzilli

Chief Marketing Officer

TGarzilli@TheBrandUSA.com

Donald F. Richardson, CPA

Chief Financial Officer

DRichardson@TheBrandUSA.com

Karyn Gruenberg

Senior Vice President, Partner

Marketing & Strategic Alliances

KGruenberg@TheBrandUSA.com

Jake Conte

Vice President, General Counsel

JConte@TheBrandUSA.com

Jackie Ennis

Vice President, Global Trade

Development

JEnnis@TheBrandUSA.com

Tracy Lanza

Senior Vice President,

Integrated Marketing

TLanza@TheBrandUSA.com

Joann Pelipesky

Vice President, Human Resources
& Administration

JPelipesky@TheBrandUSA.com

Carroll Rheem

Vice President, Research & Analytics

CRheem@TheBrandUSA.com

Aaron Wodin-Schwartz

Senior Vice President,

Communications & Public Policy

AWodinSchwartz@TheBrandUSA.com

Market Facts



Geography

Area

301,340 km²

(Almost twice the size of Georgia; slightly larger than Arizona.)

Climate

Predominantly Mediterranean; alpine in the far north; hot and dry in the south.

Largest Metropolitan Areas



Photos: Dolomites (left); Cinque Terre (right)

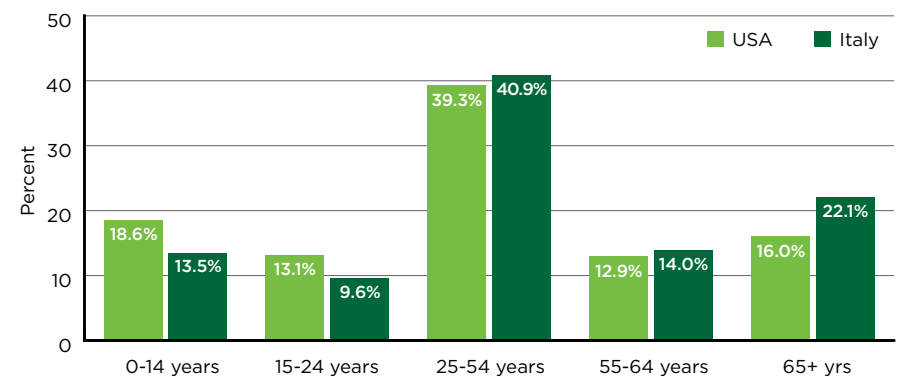
Source: CIA World Factbook 2020

Demographics

Population

	Italy	USA
Population Size	62,402,659	329,256,465
Median Age	46.5 years	38.2 years
Population Growth Rate (2019 est.)	0.11%	0.8%

Population by Age



Economy

- **GDP:** \$2.317 trillion (2017 est.)
- **GDP Real Growth Rate:** 1.5% (2017 est.)
- **GDP—Per Capita:** \$38,200 (2017 est.)
- **Unemployment Rate:** 11.3% (2017 est.)
- **Inflation Rate:** 1.3% (2017 est.)

Source: CIA World Factbook 2020



Vacation Allocation and National Public Holidays

Salaried Italian employees earn an average of 32 days of paid vacation per year. Fortunate workers also receive either a thirteenth month salary and/or vacation bonus. There are 12 days of public holidays.

National Holidays 2020

- **New Year's Day:** Wednesday, January 1
- **Epiphany:** Monday, January 6
- **Easter Day:** Sunday, April 12
- **Easter Monday:** Monday, April 13
- **Liberation Day:** Saturday, April 25
- **Labor Day:** Friday, May 1
- **Republic Day:** Tuesday, June 2
- **Assumption of Mary/Ferragosto:** Saturday, August 15
- **All Saints' Day:** Sunday, November 1
- **Feast of the Immaculate Conception:** Tuesday, December 8
- **Christmas Day:** Friday, December 25
- **St. Stephen's Day:** Saturday, December 26

Public School Holidays 2020

- **Carnival Holidays (40 days before Easter Day):** 1–3 days
- **Easter Holidays:** 5 or 7 days, including Easter Day and Easter Monday (may change depending on the region)
- **Summer Holidays:** About three months from June–September (start and end depending on the region)
- **Christmas Holidays:** About two weeks

Travel Trends

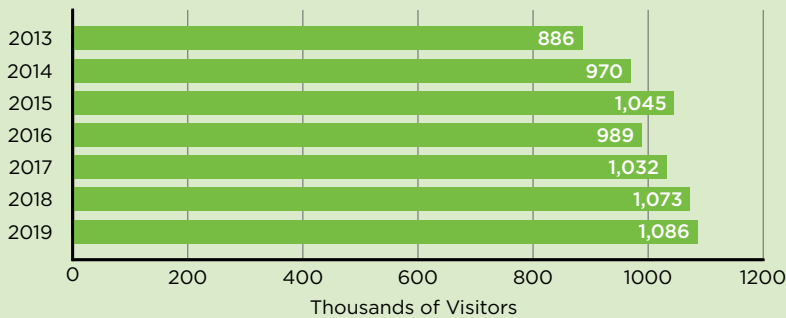


International Travel Trends

Spending Trends: Exports (millions of U.S. dollars)

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$3,673	\$4,117	\$4,310	\$4,075	\$4,189	\$4,367	\$4,327
Travel Receipts	\$2,540	\$2,878	\$3,133	\$3,022	\$3,112	\$3,286	\$3,265
Passenger Fare Receipts	\$1,133	\$1,239	\$1,177	\$1,053	\$1,077	\$1,081	\$1,062
Change (%) in Total Exports	6	12	5	-5	3	4	-1

Visitation Trends: Arrivals



Photos: Bologna (left), Manarola (right)
Source: U.S. Department of Commerce, National Travel and Tourism Office



Traveler Characteristics

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Business	11.5	11.6
Visit Friends/Relatives	12.8	14.7
Vacation/Holiday	65.0	62.0
Convention/Conference/Trade Show	4.9	6.6
Education	4.8	3.4
Health Treatment	0.1	0.3
Religion/Pilgrimages	0.2	0.1
Other	0.7	1.3

All Purposes of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	70.4	69.5
Visit Friends/Relatives	21.7	22.4
Business	15.1	14.5
Convention/Conference/Trade Show	6.6	9.0
Education	6.8	6.0
Religion/Pilgrimages	0.7	1.0
Health Treatment	0.3	0.3
Other	1.0	1.5
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	79.3	79.8
Business & Convention	20.2	20.4

Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean nights)	14.0	13.8
Length of Stay in USA (Median nights)	9.0	8.0
First International Trip to the USA	28.0%	28.1%

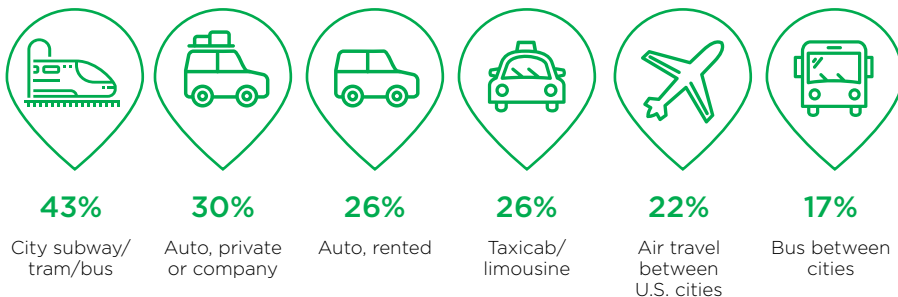
U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/Regions	2018 (%)	2019 (%)
REGIONS		
East North Central	8.26	6.83
Pacific	23.56	20.20
Middle Atlantic	50.46	48.35
South Atlantic	26.72	30.51
Mountain	11.75	12.47
STATES/TERRITORIES		
Nevada	9.53	10.17
Florida	18.86	22.63
California	21.79	18.77
New York	48.74	46.56
CITIES		
San Francisco	9.73	11.10
Los Angeles	15.14	12.02
Las Vegas	9.13	9.88
New York City	48.62	46.21
Miami	15.47	19.17

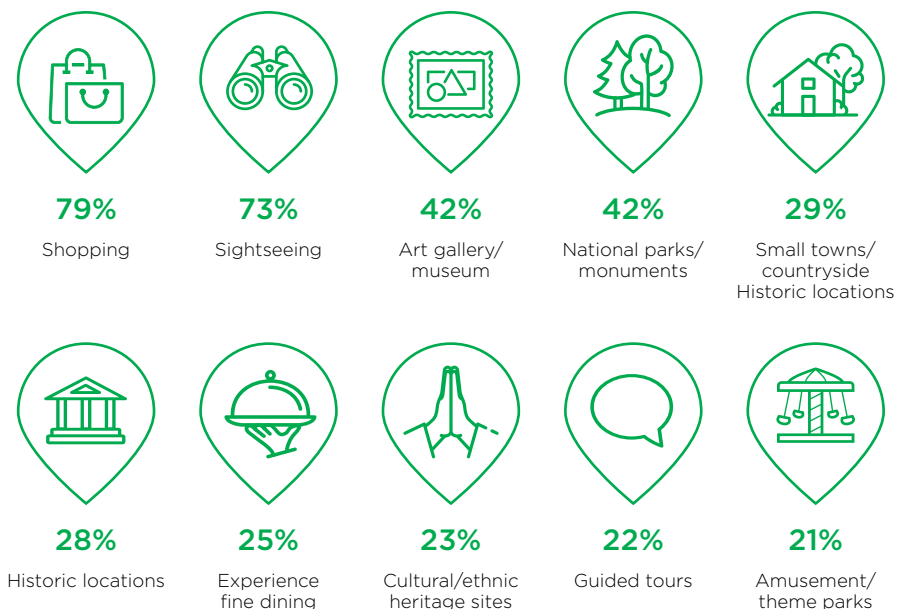
Source: U.S. Department of Commerce, National Travel and Tourism Office



Transportation Used in the USA



Activity Participation While in the USA



Market Snapshot



Overall Economic Situation

In 2019, GDP at current prices increased by 1.2 percent (EUR1.787 million) compared with the previous year. The chained volume measure of GDP increased by 0.3 percent.

Gross fixed capital formation increased in volume by 1.4 percent, final consumption expenditure by 0.2 percent, and exports by 1.2 percent. Imports of goods and services decreased by 0.4 percent.

National demand, excluding changes in inventories, has contributed to GDP growth of 0.4 percent and net exports increase of 0.5 percent. The contribution of changes in inventories decreased by 0.6 percent.

Value added in volume increased in constructions (+2.6 percent) and services activities (+0.3 percent). It decreased in agriculture, forestry, and fishing (-1.6 percent). Mining and quarrying, manufacturing, and other industrial activities also dropped (-0.4 percent).

General government net borrowing decreased to EUR29.301 million (-1.6 percent of GDP), compared to -2.2 percent in 2018. Primary balance (general government net borrowing net of interests) was up 1.7 percent of GDP, compared to an increase of 1.5 percent in 2018.

Photos: Milan (left), Matera (right)

Source: Istat



The Italian Travel Industry

Tour Operators

There are more than 750 tour operators in Italy, but only four of them can record revenue exceeding EUR100 million per year. Small to medium-sized companies are the real engine of the market because they ensure greater flexibility and response speed to travel agencies. This includes personalized services, innovative products, and the possibility to expand targets.

Travel Agencies

Approximately 8,000 travel agencies are currently working in Italy. Most of them are associated with a travel network. In 2020, 30 consortia are present in the market.

The five main Italian networks are:

- Welcome/Geo
- Bluvacanze
- Gattinoni Mondo di Vacanze
- UVET
- Robintour

Small to medium-sized companies are the real engine of the market because they ensure greater flexibility and response speed to travel agencies.

OTA (Online Travel Agencies)

Online booking is becoming more complex, as reflected by mass market websites that “save money” (Volagratis, Lastminute) and sites that reveal “hidden secrets” (SecretEscape, TripAdvisor). Other sites allow for the creation of special packages sold through specialized portals (SecretEscape) or dedicated to specific targets (active travel, travel with bloggers).

Profile of the Italian Traveler

The total number of Italian travelers grew to 71.883 million in 2019 (411.155 million overnight stays). In the summer, 37.8 percent of the population took at least one vacation. For destinations, 76.2 percent ventured throughout Italy (a 12.8 percent decrease from 2018), and 23.8 percent were directed abroad.

Leisure trips are about 89 percent of the total, and business trips are about 11 percent. 93.4 percent of overnight stays are dedicated to holidays and 6.6 percent to business travel.

The average length of travel increased slightly to 5.7 nights (six for holidays). “Long” holidays, four or more nights, continue to prevail (54.9 percent of holidays) over shorter ones (45.1 percent), most of which have a duration of four to seven nights (57.4 percent). Italians chose to go on holidays during the summer (38.8 percent), and the average duration, 8.1 nights, was about twice the length of other quarters of the year.

During the winter of 2019, the majority of Italians traveling were 25-34 years old (19.2 percent). Those aged 55-64 traveled during the spring and autumn seasons (respectively 28.0 percent and 23.4 percent). The summer brought out 35- to 44-year-old travelers (47.0 percent).

The summer period was confirmed as one with the highest concentration of holidays. In fact, about 23 million Italians left to travel, more than a third of the population (37.8 percent), with 30.8 percent of residents taking at least one long vacation (18.5 million) and 9.5 percent at least one short one (5.7 million).

In 2019, the Internet was the preferential channel for booking accommodations, with 58.2 percent of trips being booked online. About 69 percent of these reservations were made through intermediaries. The remaining 31 percent of travelers booked via the private home or hotel's website.

Italians Traveling to the USA

2019 visitation numbers from Italy were reported at 1.086 million visitors, a slight increase (1.2 percent) compared to 2018 (1.073 million).

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: Verona (left); Naples (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	frVisitTheUSA.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): 美国国家旅游局</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.or.kr	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

GoUSA_{TV} 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

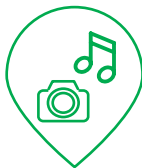
Question: What motivates your desire to visit that destination? Select all that apply (N=1035).

Base: Italy Intercontinental travelers.



55%

Cultural historic attractions



49%

Local lifestyle



44%

Beaches/seaside attractions



40%

Ecotourism and nature



35%

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=1035). Base: Italy Intercontinental travelers.

38%

Forward-thinking

36%

Energetic

31%

Trendy

30%

Adventurous

29%

Unexpected



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: Italy Intercontinental travelers (N=1035).



55%

Websites
via computer



34%

Personal advice
from family and
friends



31%

Websites/
applications
via mobile phone



28%

Information in
printed travel
guidebooks

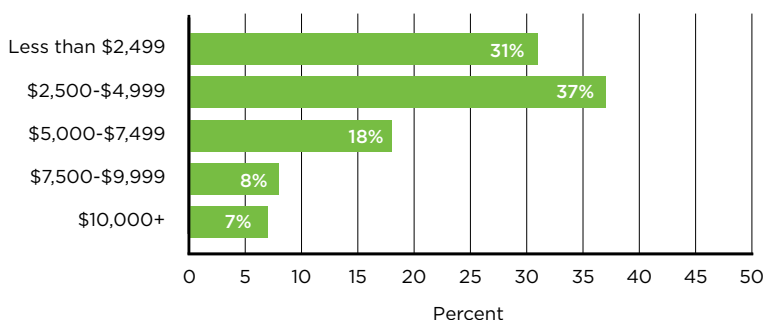


24%

Personal advice
from travel
agents

Expected Household Travel Spend for Next Intercontinental Trip

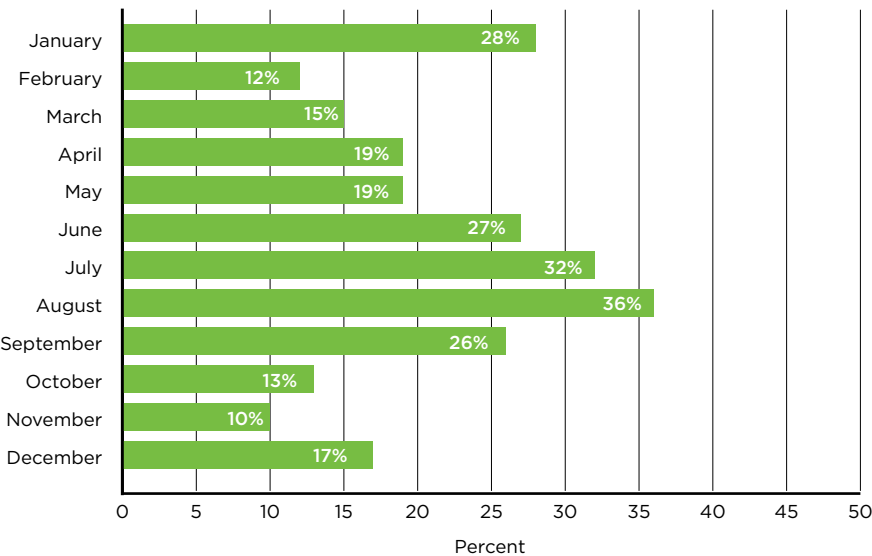
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: Italy Intercontinental travelers (N=1035).



Mean: \$4,508 **Median:** \$3,602

Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Italy Intercontinental travelers (N=1035).



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: Italy Intercontinental travelers (N=999).

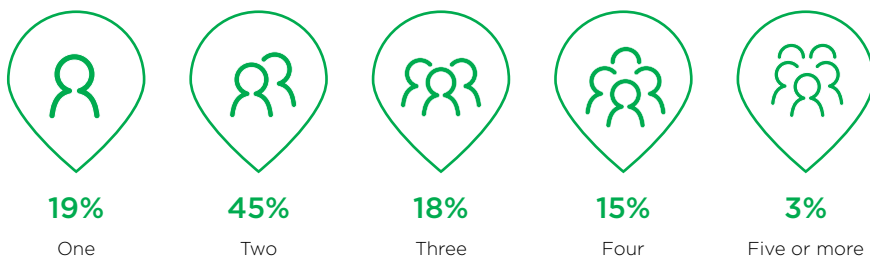
50%	45%	31%	28%	20%
California	New York	Florida	Hawaii	Texas
18%	14%	13%	12%	11%
Washington	Colorado	Alaska	Arizona	Nevada

Source: Brand USA Market Intelligence Study 2019



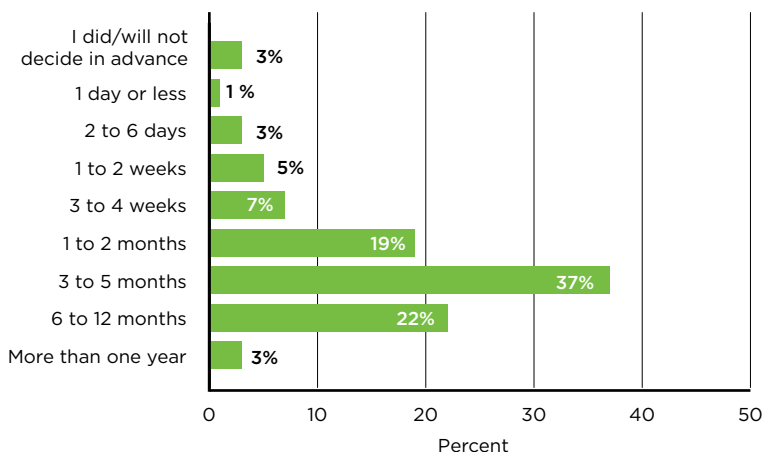
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Italy Intercontinental travelers (N=1035). Note: Totals may not add up to 100% due to rounding.



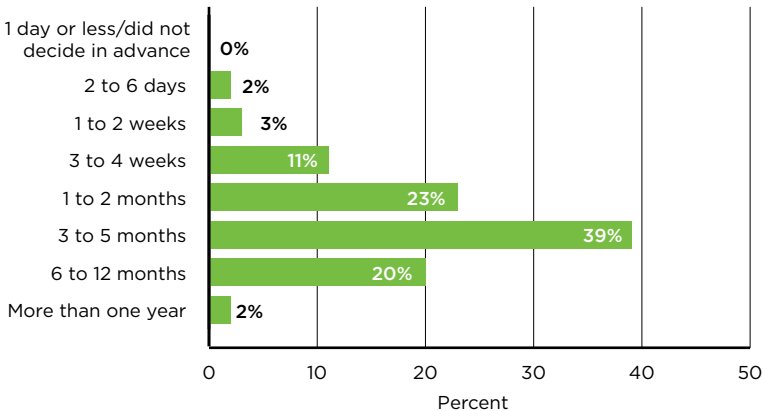
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Italy Intercontinental travelers (N=1035). 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: Italy Intercontinental travelers (N=1035). 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: Italy Intercontinental travelers (N=1035). Note: Totals may not add up to 100% due to rounding.



43%

I would bring it up to recommend as a destination



34%

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



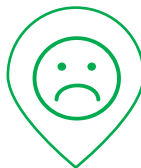
18%

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



4%

I would tell people negative things if it were brought up



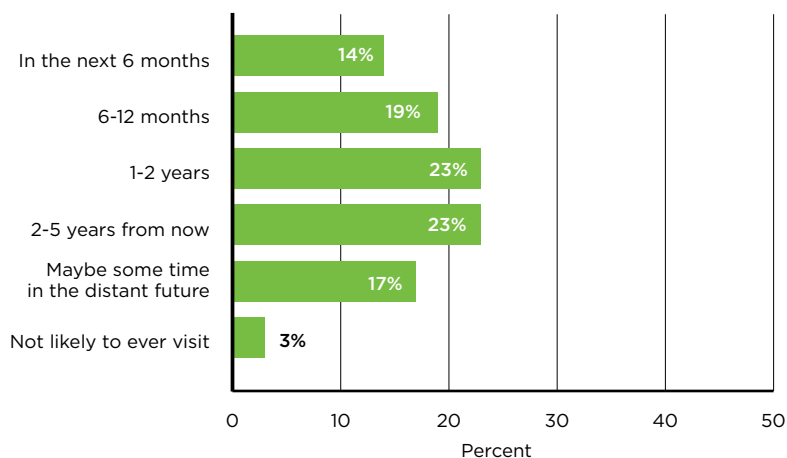
1%

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: Italy Intercontinental travelers (N=1035).



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

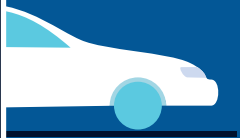
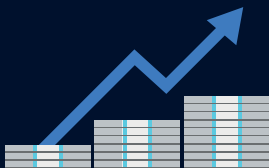


50,000+
incremental jobs
supported
each year

\$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, Italy

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 Italy Association

Massimo Loquenzi

President

InfoDesk@VisitUSAITA.org

Photos: Florence (left); Abruzzo (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:

NTTO

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

Selected Staff List:

Phil Lovas

Deputy Assistant Secretary
for Travel and Tourism
Philip.Lovas@trade.gov

Isabel Hill

Director
Isabel.Hill@trade.gov

Julie Heizer

Team Lead, Industry Relations
Julie.Heizer@trade.gov

Jennifer Aguinaga

International Trade Specialist
Jennifer.Aguinaga@trade.gov

Mark Brown

Market Research Analyst
Mark.Brown@trade.gov

Richard Champley

Senior Research Analyst
Richard.Champley@trade.gov

Curt Cottle

International Trade Specialist
Curt.Cottle@trade.gov

John Terpening

Economist
John.Terpening@trade.gov

Claudia Wolfe

Economist
Claudia.Wolfe@trade.gov



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.

Italy

Luisa Salomoni

Luisa.Salomoni@trade.gov

