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Brand USA

Market Information

INDIA

2020

About This Guide

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

Cover photo: Tea plantations in Munnar, Kerala

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 Public Holidays	11
Travel Trends	12
International Travel Trends.....	12
Inbound Travel Trends	13
Traveler Characteristics.....	14
Air Travel Information	17
Airlines	17
Key Information	19
Market Snapshot.....	21
Indian Arrivals to the United States.....	21
Profile of the Indian Traveler	22
Brand USA Resources	24
Online Channels.....	24
Brand USA Traveler Research.....	27
Highlights of Success.....	33
Brand USA Markets.....	34
Brand USA Partnerships.....	35
About the U.S. Department of Commerce.....	35

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: Rajasthan (left); Kerala (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 India 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.

The India market continues to increase in visitation and spend. The USA is the top destination of choice by Indian travelers, and the amount they spend while visiting the United States is five times the amount spent during trips to the second most popular destination. India ranks as 10th largest source market overall and fourth overall spend market. In 2019, 1.5 million people traveled from India to the United States, a seven percent increase over 2018, and those visitors spent \$16.5 billion while in the United States, an increase of 4.4 percent over 2018. Recently we are seeing an increase in demand for adventure and outdoor activities, although the top five activities are shopping, sightseeing, national parks, art galleries and museums, and fine dining.

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 India.

Together, we are marketing the USA!

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Market Facts



Geography

Area

3.28 million km²

World rank: 8

Slightly more than one-third the size of the United States.

Climate

Varies from tropical monsoon to temperate in the north.

Largest Metropolitan Areas



Photos: Punjab (left); Mumbai (right); Map of India (lower right)

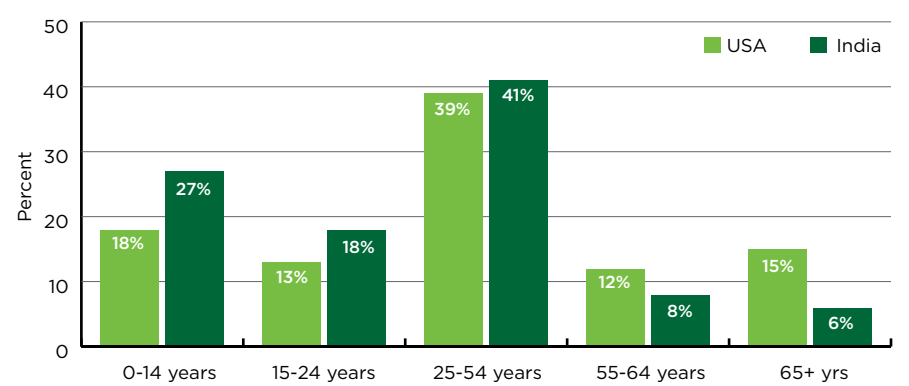
Source: CIA World Factbook 2020

Demographics

Population

	India	USA
Population Size (July 2018 est.)	1.3 billion	329,256,465
Median Age	28 years	38 years
Population Growth Rate (2018 est.)	1.14%	0.81%

Population by Age



Economy

- **GDP:** \$9.474 trillion
- **GDP Real Growth Rate:** 6.7%
- **GDP—Per Capita:** \$7,200
- **Unemployment Rate:** 8.5%
- **Inflation Rate:** 3.6%

Source: CIA World Factbook 2020



Vacation Allocation and Public Holidays

Salaried Indian employees have an average of 25–30 days of paid vacation per year.

India, being a culturally diverse and fervent society, celebrates various holidays and festivals. There are approximately 14–17 public holidays depending on the region of the country.

Primary Travel Periods and Public School Holidays 2020

- **April–July:** School summer holidays
- **October:** Two weeks break for Diwali/Dussehra (Indian Hindu festivals)
- **December:** Christmas/winter holidays

Top Activities While Traveling in the USA

The changing profile of the Indian traveler offers great opportunity—the Indian outbound traveler is well-informed, sophisticated, and educated. They are increasingly looking for “rich experiences” through a varied range of activities and attractions. Niche products are gaining popularity, especially for the luxury segment.

- Main interests: sightseeing, nightlife and entertainment, theme parks, fine dining, and shopping
- Adventure and outdoor activities are in high demand

Travel Trends

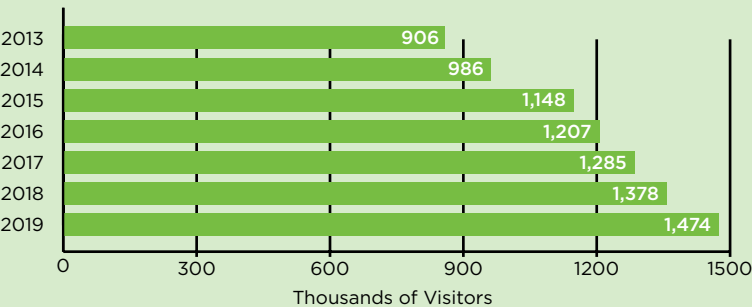


International Travel Trends

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

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$8,888	\$10,078	\$12,150	\$13,406	\$14,687	\$15,824	\$16,456
Travel Receipts	\$7,354	\$8,330	\$10,436	\$12,093	\$13,349	\$14,407	\$15,064
Passenger Fare Receipts	\$1,534	\$1,748	\$1,714	\$1,313	\$1,338	\$1,417	\$1,392
Change (%) in Total Exports	10	13	21	10	10	8	4

Visitation Trends: Arrivals



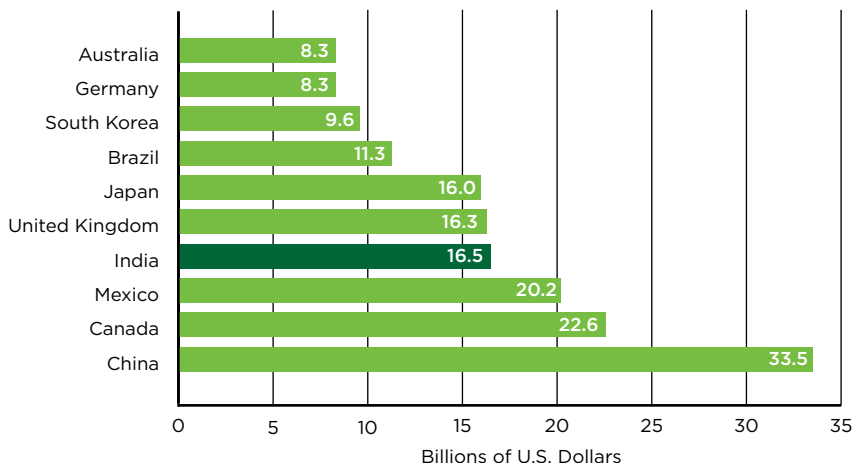
Photos: University of Mumbai (left); Amritsar, Punjab (right)

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



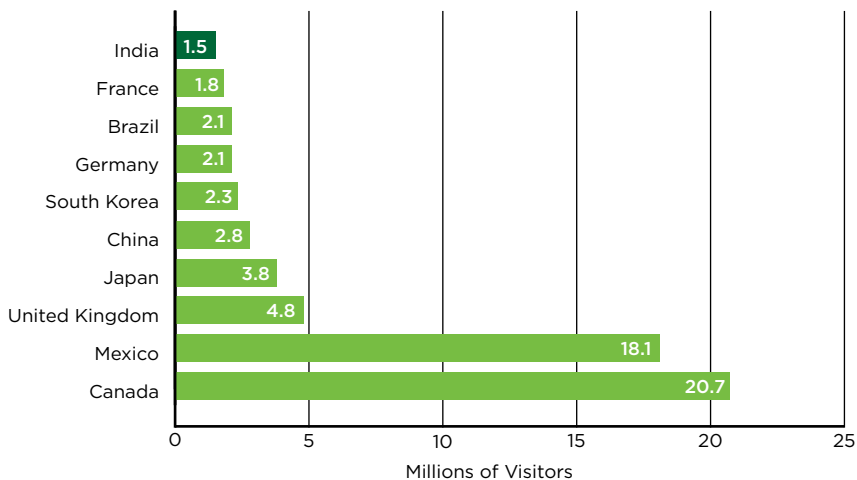
Inbound Travel Trends

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 (%)
Business	35.5	37.2
Visit Friends/Relatives	30.6	26.7
Vacation/Holiday	14.9	15.7
Convention/Conference/Trade Show	11.8	11.5
Education	5.8	6.9
Health Treatment	0.2	0.7
Religion/Pilgrimages	0.1	0.0
Other	1.0	1.2

All Purposes of Trip

All Purposes of Trip	2018 (%)	2019 (%)
Business	40.3	41.6
Visit Friends/Relatives	40.3	36.4
Vacation/Holiday	27.5	27.3
Convention/Conference/Trade Show	16.7	15.0
Education	6.4	7.7
Health Treatment	0.5	1.4
Religion/Pilgrimages	0.5	0.5
Other	1.1	1.4

NET PURPOSES OF TRIP

Leisure & Visit Friends/Relatives	51.8	49.5
Business & Convention	50.9	50.6

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



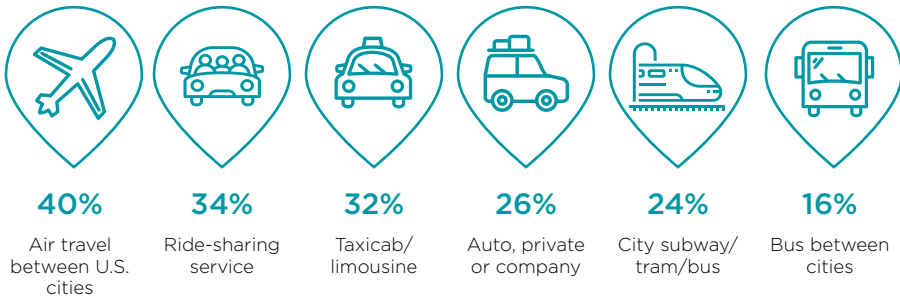
Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean Nights)	35.7	30.6
Length of Stay in USA (Median Nights)	15	15
First International Trip to the USA	25.3%	25.6%

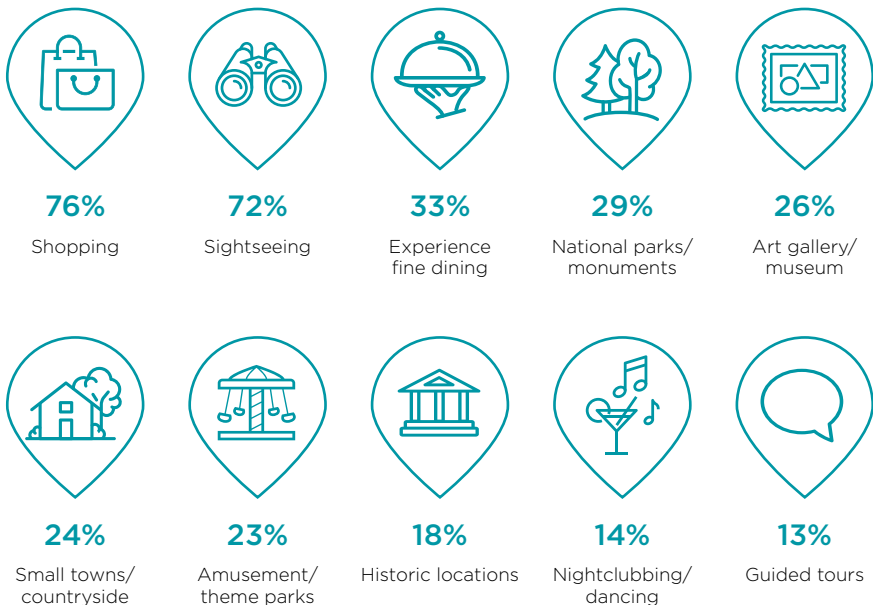
U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/ Regions	2018 (%)	2019 (%)
REGIONS		
Pacific	34.09	33.31
Middle Atlantic	37.36	33.42
South Atlantic	24.09	23.27
East North Central	16.26	12.71
West South Central	12.61	12.45
Mountain	11.99	13.39
STATES/TERRITORIES		
New York	28.90	24.17
California	29.94	28.50
Texas	11.59	10.83
CITIES		
New York City	26.46	21.64
Los Angeles	9.32	9.64
San Francisco	12.66	13.60

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



Airlines

All major airlines offer good connectivity to the United States. Direct air services are offered by Air India, United Airlines, and Delta Airlines. American Airlines is scheduled to launch a direct service from Seattle-Bengaluru in October 2020. Additionally, there are several options available via the Atlantic, Pacific, and Middle East.

Direct

- Air India, the national carrier, provides service from 69 cities in India to the United States. Air India offers 33 weekly flights to five destinations in the United States—San Francisco, New York, Chicago, Newark, and Washington, DC. Air India is a Star Alliance member.
- United Airlines offers seven weekly direct flights each from Mumbai and New Delhi into Newark Airport in New Jersey. There will be seven new weekly flights from Dehli to San Francisco in the winter months and three weekly flights in summer months.
- Delta Airlines launched seven direct weekly flights from Mumbai to New York (JFK).
- American Airlines will launch seven direct weekly flights from Seattle to Bangalore in October 2020.

Middle East Carriers

- Emerging trends indicate the rise of Middle East carriers as important players for flights into the United States. The leading carriers are Emirates Airlines, Turkish Airlines, Etihad Airways, and Qatar Airways.

Photos: Kerala (left); New Delhi (right)
Source: Brand USA Proprietary Research

-
- Emirates Airlines connects nine cities from India to 11 U.S. destinations with 101 weekly via their hub in Dubai.
 - Etihad Airways offers 175 weekly flights from 11 cities in India to Abu Dhabi. It currently has 32 weekly flights to the USA via Abu Dhabi to New York, Washington, DC, Chicago, and Los Angeles.
 - Qatar Airways operates 102 weekly flights into Doha from 13 cities in India into 10 destinations in the USA via their hub in Doha.
 - Turkish Airlines operates 14 weekly flights into their hub in Istanbul from two cities in India—New Delhi and Mumbai. They service nine destinations in the USA with 75 weekly flights from their hub in Istanbul.

Atlantic Carriers

- British Airways, Lufthansa, and KLM Royal Dutch Airlines are key players to the United States, with service from several cities in India.
- American Airlines codeshares with British Airways from India and connects via London Heathrow to the United States. There are 49 weekly codeshare flights with British Airways, connecting passengers via London to nine hubs in the USA, which further connects to 280 destinations across the country.
- The joint venture between Air France-KLM, and Delta Air Lines provides customers with access to more than 270 destinations beyond 27 North American cities.
- Lufthansa operates 48 weekly flights from five major cities in India to its hub in Frankfurt and Munich, connecting onward to 18 destinations in the United States.
- British Airways flies 49 weekly flights from five cities in India to its hub in London. The hubs in India are Bengaluru, Chennai, Mumbai, New Delhi, and Hyderabad. British Airways' route network currently serves more than 280 routes around the world.
- Virgin Atlantic operates seven weekly flights from New Delhi and Mumbai and from New Delhi to London Heathrow. From its base, it flies to 10 destinations in the United States.



Pacific Carriers

- Cathay Pacific flies 36 weekly flights from six cities in India to their hub, along with the Cathay Dragon Air network. The hubs in India are Bangalore, Chennai, Hyderabad, Mumbai, Delhi, and Kolkata. Cathay Pacific flies 104 weekly flights into six destinations in the United States via their hub in Hong Kong.
- Singapore Airlines flies 41 weekly flights into five destinations in the USA via their hub in Singapore. Singapore Airlines and Silk Air fly from 11 cities in India and have 99 weekly flights to Singapore.
- All Nippon Airlines flies 98 weekly flights into nine destinations in the USA from Tokyo (Haneda/Narita airport). It flies 14 weekly flights from Mumbai and New Delhi in India, and three weekly flights from Chennai.
- Japan Airlines, Korean Air, Air China, China Southern, and China Eastern Airlines are also rising as important players in the Pacific route.

Please note, the above airlift information is subject to change as flights are being canceled and rescheduled due to the COVID-19 pandemic.

Key Information

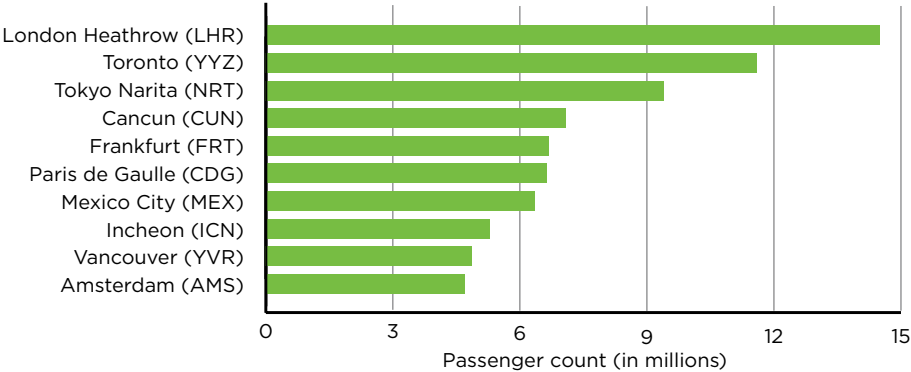
Key Origin Markets in India for the United States

- | | | |
|-------------|-------------|----------|
| • Bengaluru | • Delhi | • Mumbai |
| • Chennai | • Hyderabad | |

Major Gateway Airports in the United States

- | | | |
|-----------------|---------------------|------------------------|
| • Atlanta (ATL) | • Houston (IAH) | • San Francisco (SFO) |
| • Boston (BOS) | • Los Angeles (LAX) | • Washington, DC (IAD) |
| • Chicago (ORD) | • New York (JFK) | |
| • Dallas (DFW) | • Newark (EWR) | |

Top 10 Foreign Airports (Passenger Traffic to/from USA)



Market Snapshot



The USA ranks among the top destinations for travelers from India who venture outside their country. During 2019, 1.5 million visitors from India arrived in the United States. This was a 6.9 percent increase over the level of visitation in 2018.

Indian Arrivals to the United States

Travelers from India spend more in the United States, compared to other destinations. Overall, 30 percent of all outbound tourism spending by Indians is done in connection with trips to the United States. The level of Indian spending on U.S. trips is five times the amount spent during visits to the second most popular destination, Australia.

During 2019, travelers from India spent USD16.5 billion during U.S. visits, which was 4.3 percent more than the previous year.

India has a population of over 1.3 billion, and 700 million are under the age of 35. India's economy is also fast-growing. The increasing affluence of India's middle-class population is a driving force.

Overall, 30 percent of all outbound tourism spending by Indians is done in connection with trips to the United States.

Profile of the Indian Traveler

Indian travelers are generally well-informed and sophisticated. They tend to look for new destinations and activities, and beyond-the-ordinary experiences that allow them to “live like a local.”

- The United States is the leading aspirational destination for travelers from both metro and non-metro areas and for those who have never traveled. Australia and New Zealand rank second and third as preferred destinations among travelers in metro locations.
- Growing affluence has led to an increase in disposable income for middle-class Indians.
- Growth exists in all segments: Free Individual Traveler (FIT), special interest, student travel, and MICE (meetings, incentives, conferences, and exhibitions).
- Major drivers for travelers from India are sightseeing, entertainment, nightlife, theme parks, family attractions, shopping, adventure and outdoor activities, and culinary experiences.
- Indian millennials tend to be adventurous, confident, and more inclined toward discretionary consumption of activities such as travel, as opposed to savings. They prefer independent travel over group tours, with a focus on entertainment and nightlife. Among 18- to 25-year-olds, 45 percent went on their first international trips with friends or by themselves.
- In India, there is a growing preference for customized trips exists, compared to fixed-departure group tours. Consumers view websites and social media as travel influencers during their search for information.
- Indian travelers are willing to extend the duration of their holidays and spend more on their trips. They are also eager to explore locations beyond gateway cities. For instance, they may have interest in traveling through countryside areas to experience local art, culture, and cuisine.

Indian travelers tend to look for beyond-the-ordinary experiences that allow them to “live like a local.”



- Travelers from India are stretching out the average length of their holidays when they go to long-haul destinations, especially when they travel with their families. They also tend to return to preferred destinations. And, they favor holidays with multiple destinations.

Digital Snapshot 2019

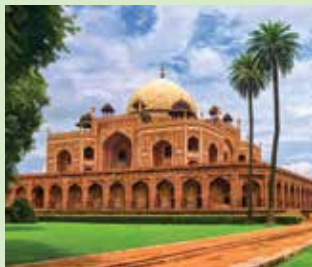
Digital Media Channel	Number of Users (millions)
Active Internet Users	560
Unique Internet Visitors (mobile)	414
Active Social Media Users	300
Active Social Users (mobile)	230

Social Media Snapshot 2019

Social Media Channel	Number of Users (millions)
Facebook	300
Instagram	64
LinkedIn	56
Twitter	30.4

Sources: PATA; Media COM Brand USA local market Insight India 2020; Internet World Stats; ITU; Eurostat; CIA World Factbook; Media in the Middle East; Statistica 2020; Live Mint 2017; HT Tech

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: Goa (left); New Delhi (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://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):</p> <p>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



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=1012).

Base: India Intercontinental travelers.



64%

Beaches/seaside attractions



57%

Shopping



54%

Urban attractions



52%

Cultural/historic attractions



51%

Local lifestyle

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=1012). Base: India Intercontinental travelers.

46%

Friendly

46%

Energetic

42%

Open-minded

40%

Adventurous

40%

Trendy

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: India intercontinental travelers (N=1012).



60%

Websites
via computer



52%

Websites/
applications
via mobile phone



44%

Personal advice
from friends/
family



41%

Online
advertising/email



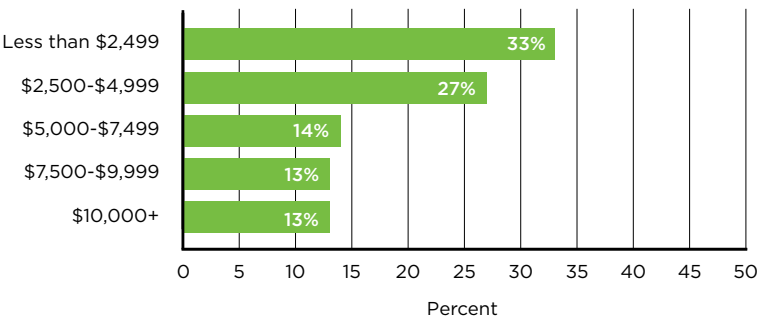
37%

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: India intercontinental travelers (N=1012). Note: Totals may not add up to 100% due to rounding
(Conversion INR to USD= 0.015).

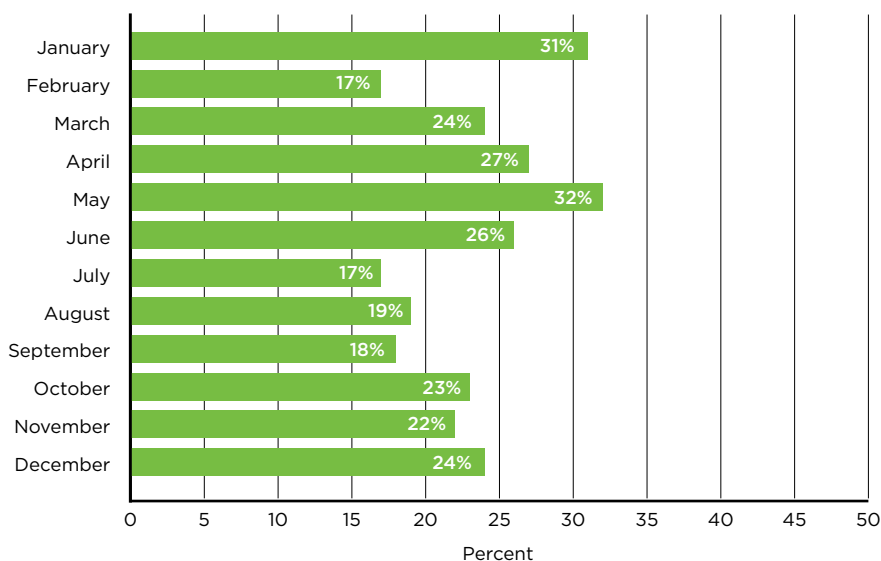


Mean: \$5,709 **Median:** \$3,900



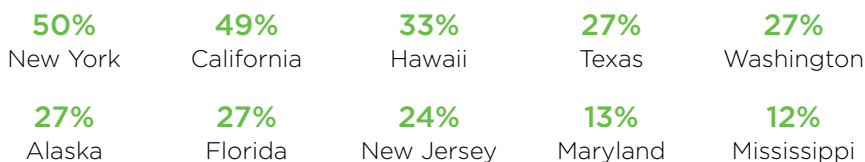
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: India intercontinental travelers (N=1012).



Destination Interest—Top 10 States

Question: You indicated in a previous question that you have interest in visiting the U.S. sometime in the future. Which U.S. state(s) are you interested in visiting? Base: India intercontinental travelers with interest in visiting the United States (N=1012).



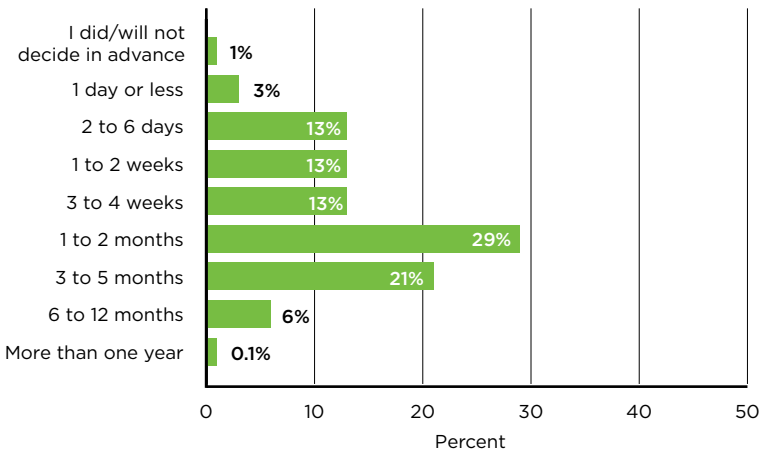
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: India intercontinental travelers (N=1012). 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: India intercontinental travelers (N=1012). Note: Totals may not add up to 100% due to rounding.

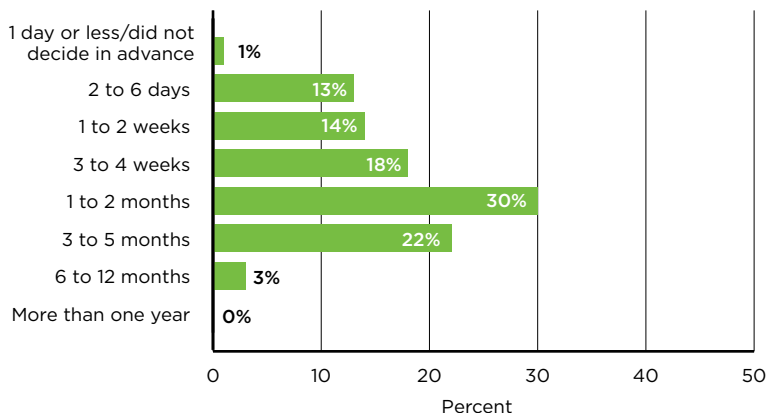




Air Booking for Next International Trip

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: India intercontinental travelers (N=1012).

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:

India intercontinental travelers (N=1012). Note: Totals may not add up to 100% due to rounding.



52%

I would bring it up to recommend as a destination



32%

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



12%

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



3%

I would tell people negative things if it were brought up

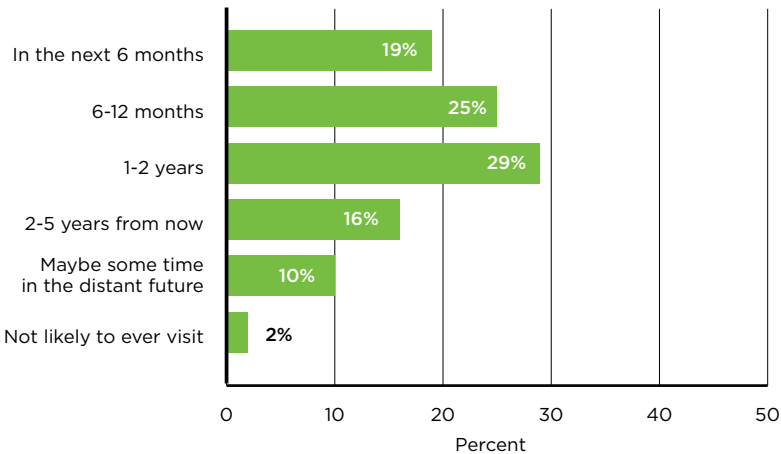


2%

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: India intercontinental travelers (N=1012).





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

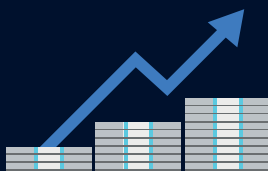


50,000+
incremental jobs
supported
each year

\$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



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;

Photos: Mumbai (left); Andaman (right)

Source: CIA World Factbook 2018, unless noted otherwise

-
- 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

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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 to attract international visitors and to 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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