



USA

VisitTheUSA.com

Brand USA

Market Information

SPAIN

2020

About This Guide

This market guide includes a snapshot of the economies in Spain, 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: Cordoba

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.....	11
Travel Trends	12
International Travel Trends.....	12
Traveler Characteristics.....	13
Air Travel Information	16
Market Snapshot.....	19
Brand USA Resources	21
Online Channels.....	21
Brand USA Traveler Research.....	24
Highlights of Success.....	30
Brand USA Markets.....	31
Brand USA Partnerships.....	32
Visit USA Committee, Spain.....	32
About the U.S. Department of Commerce.....	33

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: Toledo (left); Malaga (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 Spain 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.

While Spain continues to rank as 12th largest overseas source market for inbound visitation to the United States, in 2019 we saw an increase of travelers from Spain at 943,000 people up from 876,000 in 2018. The top five activities Spaniards enjoy while in the United States are shopping, sightseeing, touring national parks and monuments, exploring art galleries and museums, and visiting historic locations.

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



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

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

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

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

505,990 km²

Largest Metropolitan Areas



Photos: Ibiza (left); Madrid (right)

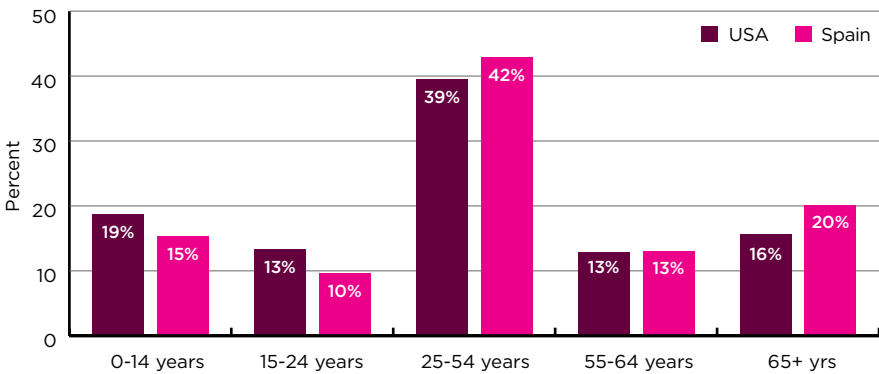
Sources: CIA World Factbook 2020; INE 2020; U.S. Census Bureau 2020

Demographics

Population

	Spain	USA
Population Size	47,100,396	332,639,102
Median Age	44	38.5 years
Population Growth Rate (2020 est.)	0.81%	0.78%

Population by Age



Economy

- **GDP:** \$1.460 trillion
- **GDP Real Growth Rate:** 2%
- **GDP—Per Capita:** \$33,146
- **Unemployment Rate:** 13.8%
- **Inflation Rate:** 0.8%

Sources: CIA World Factbook 2020; INE 2020; U.S. Census Bureau 2020; European Commission 2020; Trading Economics 2019



Vacation Allocation

Spaniards get four weeks of paid holidays plus 12 public holidays.

Public Holidays 2020

The 2020 labor calendar in Spain includes a total of 14 public holidays. The following 10 dates are common to the whole country, with four dates varying in different regions of Spain.

- **New Year's Day:** Wednesday, January 1
- **Epiphany:** Monday, January 6
- **Good Friday:** Friday, April 10
- **Labor Day:** Friday, May 1
- **Assumption Day:** Saturday, August 15
- **Fiesta Nacional de España:** Monday, October 12
- **All Saints' Day:** Sunday, November 1
- **Constitution Day:** Sunday, December 6
- **Immaculate Conception:** Tuesday, December 8
- **Christmas Day:** Friday, December 25

Primary Travel Periods 2020

Spain has the following primary travel periods and public school holidays:

- **Carnival Holidays (40 days before Easter Day):** 1-3 days
- **Easter Holidays:** Almost two weeks in April
- **Summer Holidays:** 10 weeks of school holidays (depending on the region)
- **Christmas Holidays:** Two weeks in December

Travel Trends



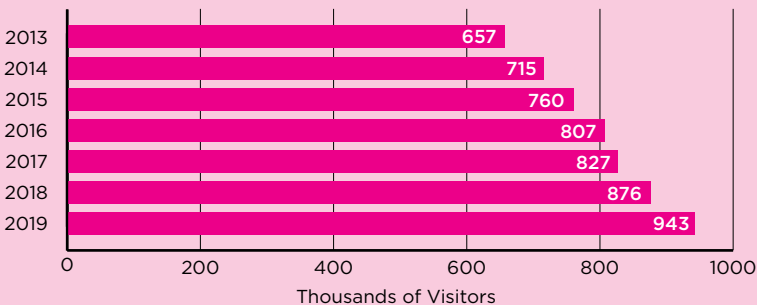
International Travel Trends

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

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$2,374	\$2,764	\$2,903	\$2,938	\$2,859	\$2,911	OCT
Travel Receipts	\$1,819	\$2,012	\$2,101	\$2,173	\$2,162	\$2,309	OCT
Passenger Fare Receipts	\$555	\$752	\$802	\$765	\$697	\$602	OCT
Change (%) in Total Exports	3	16	5	1	-3	2	OCT

OCT: To be released in October 2020

Visitation Trends: Arrivals



Photos: Granada (left); Valencia (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	8.2	8.6
Convention/Conference/Trade Show	5.4	4.6
Education	4.5	2.9
Health Treatment	0.4	0.4
Vacation/Holiday	61.0	61.4
Visit Friends/Relatives	20.0	21.8
Religion/Pilgrimages	0.2	0.1
Other	0.4	0.1

All Purposes of Trip

All Purposes of Trip	2018 (%)	2019 (%)
Business	9.7	11.7
Convention/Conference/Trade Show	7.6	5.1
Education	7.1	4.8
Health Treatment	0.8	0.3
Vacation/Holiday	73.2	70.9
Visit Friends/Relatives	30.9	32.9
Religion/Pilgrimages	0.7	0.6
Other	0.4	0.2
NET PURPOSES OF TRIP		
Business & Convention	15.6	15.9
Leisure & Visit Friends and Relatives	85.3	85.0

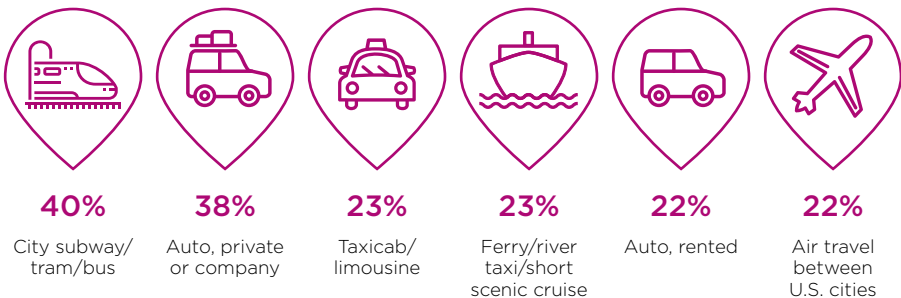
Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean Nights)	17.0	15.7
Length of Stay in USA (Median Nights)	9	9
First International Trip to the USA	31.7%	32.5%

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

U.S. Destinations/Regions	2018 (%)	2019 (%)
REGIONS		
Middle Atlantic	45.77	50.52
Pacific	19.40	18.02
South Atlantic	29.88	30.61
STATES/TERRITORIES		
New York	44.14	48.51
California	17.84	16.81
Florida	20.70	23.08
CITIES		
New York City	43.72	48.35

Transportation Used in the USA



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



Activity Participation While in the USA



86%

Shopping



82%

Sightseeing



48%

National parks/
monuments



42%

Art gallery/
museum



39%

Historic
locations



34%

Guided tours



28%

Cultural/ethnic
heritage sites



27%

Amusement/
theme parks



27%

Small towns/
countryside



17%

Experience
fine dining

Air Travel Information



Non-Stop Flights from Spain to the USA

Airline	Flights From	Flights To	Frequency (week)
Air Europa	Madrid	Miami	7 (daily)
Air Europa	Madrid	New York (JFK)	7 (daily)
American Airlines	Barcelona	Charlotte	7 (daily) May-October
American Airlines	Barcelona	Chicago	7 (daily) May-October
American Airlines	Barcelona	Miami	7 (daily)
American Airlines	Barcelona	New York (JFK)	7 (daily)
American Airlines	Barcelona	Philadelphia	7 (daily) March-November
American Airlines	Madrid	Charlotte	7 (daily) May-September
American Airlines	Madrid	Dallas/Fort Worth	7 (daily)
American Airlines	Madrid	Miami	7 (daily)
American Airlines	Madrid	New York (JFK)	7 (daily)
American Airlines	Madrid	Philadelphia	7 (daily)
Delta Airlines	Barcelona	Atlanta	7 (daily) March-November
Delta Airlines	Barcelona	New York (JFK)	7 (daily) May-September
Delta Airlines	Madrid	Atlanta	7 (daily) March-November
Delta Airlines	Madrid	New York (JFK)	7 (daily) May-September
Iberia	Madrid	Boston	7 (daily) April-October
Iberia	Madrid	Boston	3 (January-March)
Iberia	Madrid	Boston	3 (November-December)
Iberia	Madrid	Chicago	7 (daily)

Flights have been affected by COVID-19.

Photos: Barcelona (left); Pamplona (right)



Airline	Flights From	Flights To	Frequency (week)
Iberia	Madrid	Los Angeles	7 (daily) June-September
Iberia	Madrid	Los Angeles	3 (January 1-11, February 25-December)
Iberia	Madrid	Los Angeles	3 (March)
Iberia	Madrid	Los Angeles	5 (April-May)
Iberia	Madrid	Los Angeles	5 (October)
Iberia	Madrid	Los Angeles	3 (November-December)
Iberia	Madrid	Mexico	21 (3 daily) June-August
Iberia	Madrid	Mexico	20 (3 daily, except 2 daily Thurs) September
Iberia	Madrid	Mexico	19 (3 daily, except 2 daily Tues/Thurs) May
Iberia	Madrid	Mexico	18 (3 daily, except 2 daily Tues/Wed/Thurs) October
Iberia	Madrid	Mexico	17 (2 daily, except 3 daily Mon/Fri/Sun) March-April
Iberia	Madrid	Mexico	15 (January)
Iberia	Madrid	Mexico	14 (2 daily) February
Iberia	Madrid	Mexico	14 (2 daily) November-December
Iberia	Madrid	Miami	14 (2 daily) April-October
Iberia	Madrid	Miami	12 (2 daily, except Tues/Thurs) January-March
Iberia	Madrid	Miami	12 (2 daily, except Tues/Thurs) November-December
Iberia	Madrid	New York (JFK)	14 (2 daily)
Iberia	Madrid	San Francisco	3 (April-October)
Iberia	Madrid	San Juan	5 (June-October)
Iberia	Madrid	San Juan	4 (April-March)
Iberia	Madrid	San Juan	3 (January-March)
Iberia	Madrid	San Juan	3 (November-December)
Iberia	Madrid	Washington, DC	5 (July-October)
Iberia	Madrid	Washington, DC	4 (May-June)
Level	Barcelona	Boston	4 (April-October)

Airline	Flights From	Flights To	Frequency (week)
Level	Barcelona	Boston	3 (January-March)
Level	Barcelona	New York (JFK)	4 (April-October)
Level	Barcelona	New York (JFK)	3 (March)
Level	Barcelona	San Francisco	3 (April-October)
Norwegian Air	Barcelona	Los Angeles	7 (daily)
Norwegian Air	Barcelona	New York (JFK)	7 (daily)
Norwegian Air	Madrid	Los Angeles	3 (January-March)
Norwegian Air	Madrid	New York (JFK)	1-2 (Year-round)
United Airlines	Barcelona	New York (JFK)	7 (daily)
United Airlines	Barcelona	Washington, DC	7 (daily) April-October
United Airlines	Madrid	New York (JFK)	7 (daily)
United Airlines	Madrid	Washington, DC	7 (daily) May-October

Other Routes

There are many other flights connecting in different points of Europe to all main destinations in the USA with airlines such as Air France/KLM, British Airways, Lufthansa, Delta Airlines, etc.

Market Snapshot



- The number of Spaniards who travel outside of the country continues to rise. From Q1 2019 to Q3 2019, the number rose by 1.4 percent, according to the El País.
- Spaniards who traveled abroad between January and December 2019 spent an average of EUR237 on each journey. This was 12.72 percent more than they spent during 2018.
- Spain remains one of the fastest growing European economies. The Spanish GDP closed the year with an increase of around 2 percent, which is slightly less than previous years but higher than the performance of other major European economies.
- Spain's unemployment rate continues to decrease. In 2019, it was 13.8 percent, which stabilizes the purchasing power of Spaniards.
- Spaniards are increasingly open to travel and place emphasis on trying new and exclusive experiences. Spanish travelers used online booking services to arrange 70 percent of their transportation, and 52 percent book their accommodations online. This trend is said to continue. According to experts, by 2022, online booking will become Spanish consumers' preferred method of making travel plans.

According to experts, by 2022, online booking will become Spanish consumers' preferred method of making travel plans.

Information may have changed depending on travel regulations.

Photos: Mallorca (left); Seville (right)

Sources: El País 2020; European Commission 2020; Trading Economics 2019; Observatur 2019

-
- The 40 largest tourism companies in Spain have a turnover of more than EUR45 billion. Amadeus achieved the most turnover, with Iberia following. They lead the 40 tourism companies, obtaining a turnover of EUR4,852 million and EUR4,786 million, respectively.
 - Other travel divisions among the 40 largest tourism companies include Globalia, ranked fourth, and Barceló Group, ranked sixth, and Viajes El Corte Inglés, ranked 11th.
 - The National Commission of Markets and Competition (CNMC) officially authorized the Barceló (Ávoris Reinventing Travel) and Globalia travel division merger on March 13, 2020.

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: Tenerife (left); Cádiz (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=1017).

Base: Spain Intercontinental travelers.



63%

Cultural historic attractions



54%

Local lifestyle



44%

Dining/
gastronomy



41%

Beaches/seaside attractions



39%

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=1017). Base: Spain Intercontinental travelers.

47%

Diverse

32%

Trendy

28%

Open-minded

25%

Adventurous

24%

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: Spain Intercontinental travelers (N=1017).



62%

Websites via computer



44%

Personal recommendations from friends/family



32%

Websites/applications via mobile phone



27%

Information in printed travel guidebooks

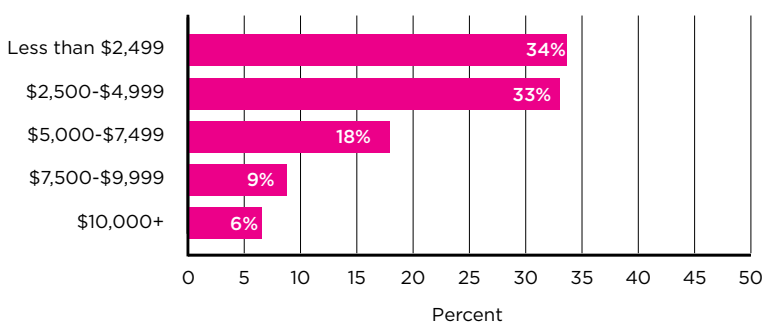


27%

Websites/applications via tablet

Expected Household Travel Spend for Next Intercontinental Trip

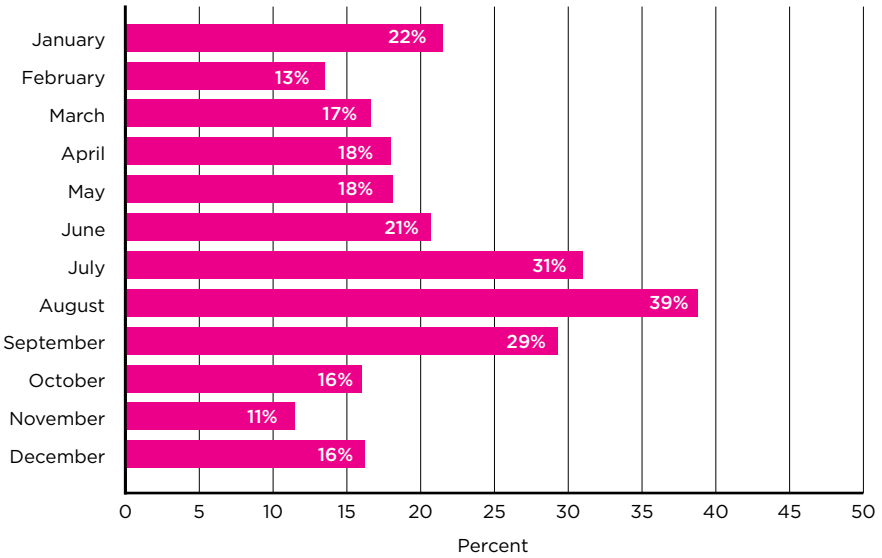
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Spain Intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding (Conversion EUR to USD=1.162).



Mean: \$4,527 Median: \$3,486

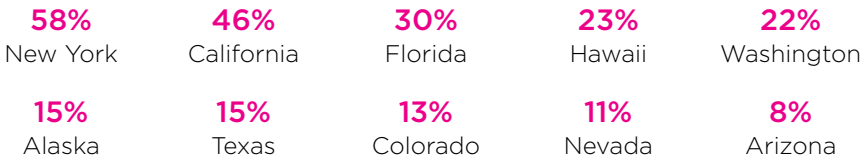
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Spain Intercontinental travelers (N=1017).



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: Spain Intercontinental travelers with interest in visiting the United States (N=1017).





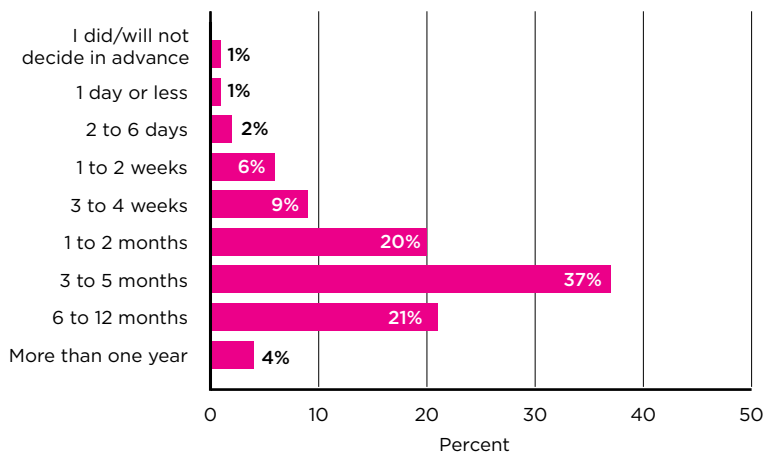
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Spain Intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.



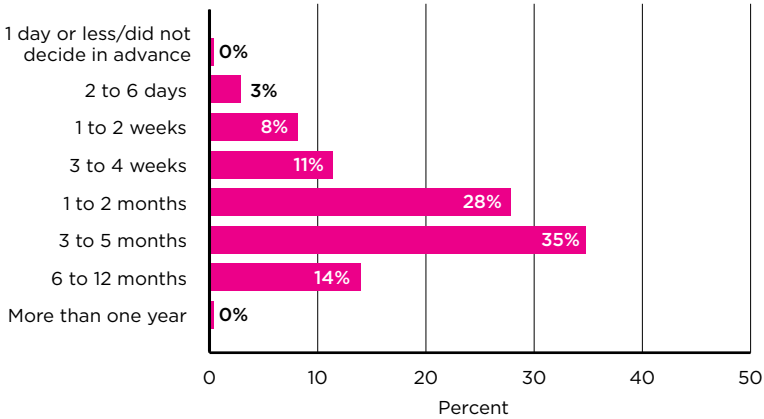
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Spain Intercontinental travelers 2017 (N=1017). 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: Spain Intercontinental travelers 2019 (N=1017). 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: Spain Intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.



51%

I would bring it up to recommend as a destination



28%

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



14%

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



5%

I would tell people negative things if it were brought up



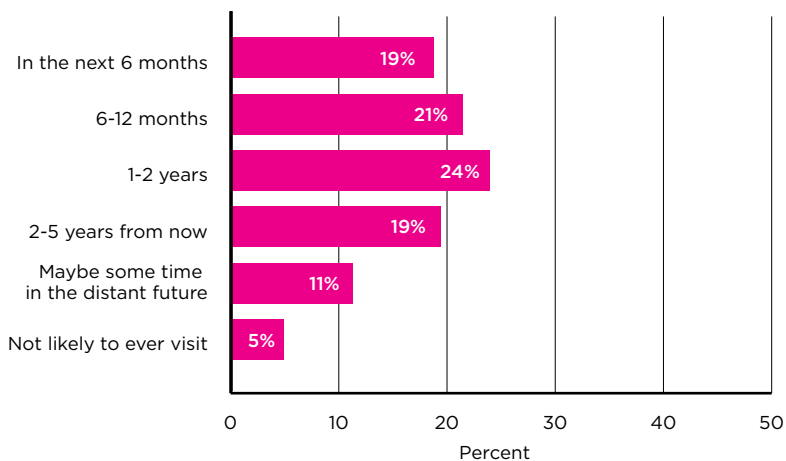
2%

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: Spain Intercontinental travelers 2019 (N=1017).



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

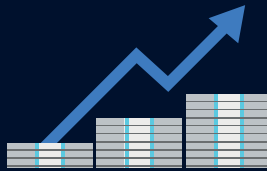


50,000+
incremental jobs
supported
each year

\$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, Spain

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 Spain

Victor Muntane Pavillard

President

Ángel Seijas

Vice President

Info@VisitUSA-Spain.com

Photos: Andalusia (left); Consuegra (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.

Spain

Karen DuBois

Commercial Specialist

Karen.DuBois@Trade.gov

TheBrandUSA.com

7.30.20