



USA

VisitTheUSA.co.uk

Brand USA

Market Information

UNITED KINGDOM
& IRELAND

2020

About This Guide

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

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Brand USA



Who We Are

Our Mission

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide. Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

Building on Success

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



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 United Kingdom (UK) 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 UK travel landscape was dominated in 2019 by concerns related to Brexit and the dissolution of Thomas Cook. Despite these challenges, the UK continues to rank as the largest overseas source market for inbound visitation to the United States. In 2019, 4.8 million people traveled from the UK to the United States, a three percent increase over 2018, and spent \$16.3 billion, which makes the UK the fifth largest spend market. The top five experience UK travelers enjoy while in the United States are shopping, sightseeing, visiting national parks and monuments, touring 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 the United Kingdom.

Together, we are marketing the USA!

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Brand USA

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Market Facts



Geography

Area

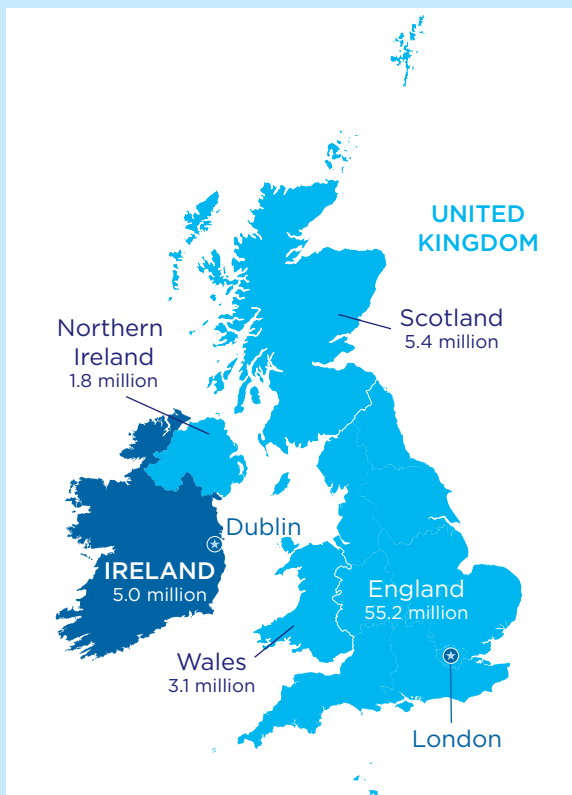
United Kingdom

243,610 km²

Ireland

70,273 km²

Largest Metropolitan Areas



Photos: Brighton, England (left); Isle of Skye, Scotland (right)

Source: CIA World Factbook 2018

Climate

United Kingdom

The United Kingdom has a temperate climate, moderated by prevailing southwest winds over the North Atlantic Current. More than half of the days through the year are overcast.

Ireland

Ireland has a temperate maritime climate with mild winters and cool summers. The days are also overcast half of the time.

Demographics

Population

| | United Kingdom | Ireland | USA |
|---|----------------|------------|-------------|
| Population Size | 65,761,117 | 5,178,569 | 332,639,102 |
| Median Age | 40.6 years | 37.8 years | 38.5 years |
| Population Growth Rate (2020 est.) | 0.49% | 1.04% | 0.78% |

Major Urban Areas

United Kingdom

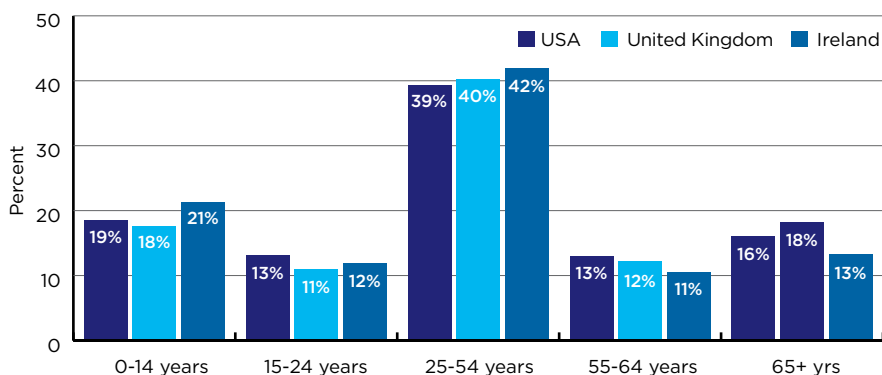
- **London (capital):** 9.304 million
- **Manchester:** 2.73 million
- **Birmingham:** 2.607 million
- **West Yorkshire:** 1.889 million
- **Glasgow:** 1.663 million
- **Southampton/Portsmouth:** 928,000

Ireland

- **Dublin (capital):** 1.228 million



Population by Age



Economy

- **GDP:** \$2.925 trillion / \$351.5 billion
- **GDP Real Growth Rate:** 1.7% / 7.2%
- **GDP—Per Capita:** \$44,300 / \$73,200
- **Unemployment Rate:** 4.4% / 6.7%
- **Inflation Rate:** 2.7% / 0.3%

United Kingdom / Ireland; 2020 est.

Vacation Allocation and Public Holidays

England, Wales, and Scotland

Almost all workers are legally entitled to five to six weeks of paid holiday each year. An employer can include bank holidays as part of statutory annual leave.

| 2020 | | |
|-------------|-----------|--|
| 1 January | Wednesday | New Year's Day (substitute day) |
| 2 January | Thursday | 2nd January (Scotland only) (substitute day) |
| 10 April | Friday | Good Friday |
| 13 April | Monday | Easter Monday (England and Wales only) |
| 8 May | Friday | Early May bank holiday |
| 25 May | Monday | Spring bank holiday |
| 3 August | Monday | Summer bank holiday (Scotland only) |
| 31 August | Monday | Summer bank holiday (England and Wales only) |
| 30 November | Monday | St Andrew's Day (Scotland only) |
| 25 December | Friday | Christmas Day |
| 26 December | Saturday | Boxing Day |

Northern Ireland and Republic of Ireland

Nearly all workers are legally entitled to four weeks of paid holiday yearly.

| 2020 | | |
|-------------|-----------|--|
| 1 January | Wednesday | New Year's Day (substitute day) |
| 17 March | Tuesday | St. Patrick's Day (Republic of Ireland) |
| 13 April | Monday | Easter Monday |
| 4 May | Monday | Early May bank holiday |
| 1 June | Monday | June bank holiday (Republic of Ireland) |
| 3 August | Monday | August bank holiday (Republic of Ireland) |
| 26 October | Monday | October bank holiday (Republic of Ireland) |
| 25 December | Friday | Christmas Day |
| 28 December | Monday | St. Stephen's Day |



Primary Travel Periods 2020

- **February:** School break
- **April:** Easter
- **Summer Holidays:** Six weeks in July/August; school starts in early September
- **October:** School break
- **Winter Holidays/Christmas**

Public School Holidays 2020

Schools are generally broken up in terms, having six terms per year:

- **Term 1:** Early September–late October
- **Term 2:** Early November–late December
- **Term 3:** Early January–mid February
- **Term 4:** Late February–late March/early April
- **Term 5:** Mid April–late May
- **Term 6:** Early June–late July

Students receive a few days off between each term. Families often plan travel during those times.

Travel Trends

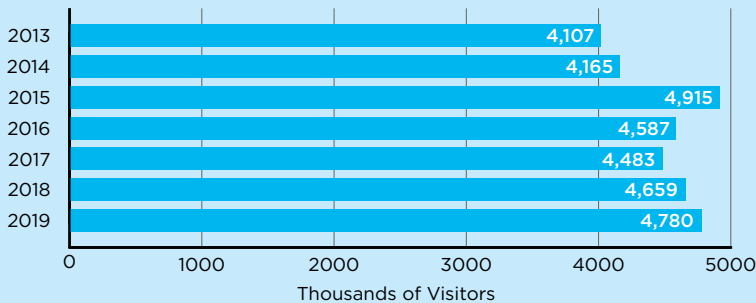


International Travel Trends: United Kingdom

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|----------|----------|----------|----------|----------|----------|----------|
| Total Travel & Tourism Exports | \$13,462 | \$14,762 | \$16,961 | \$15,954 | \$15,668 | \$15,991 | \$16,332 |
| Travel Receipts | \$10,177 | \$11,119 | \$13,427 | \$12,800 | \$12,427 | \$12,889 | \$13,284 |
| Passenger Fare Receipts | \$3,285 | \$3,643 | \$3,534 | \$3,154 | \$3,241 | \$3,102 | \$3,048 |
| Change (%) in Total Exports | 1 | 10 | 15 | -6 | -2 | 2 | 2 |

Visitation Trends: Arrivals



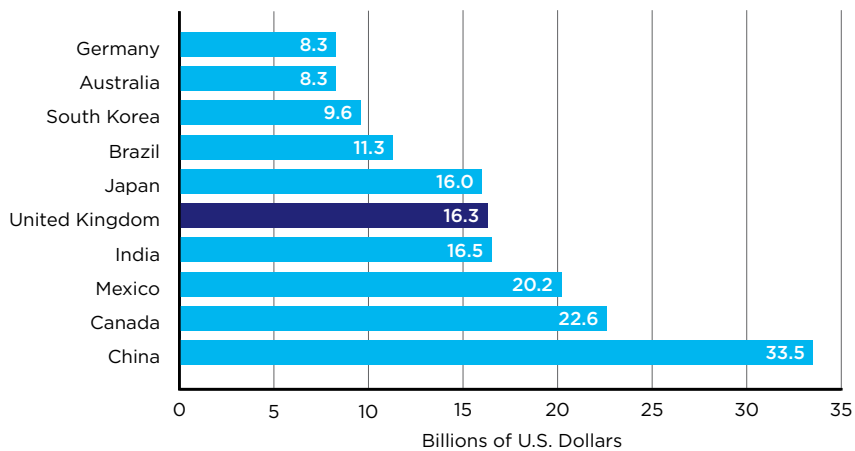
Photos: Glasgow, Scotland (left); Oxford, England (right)

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



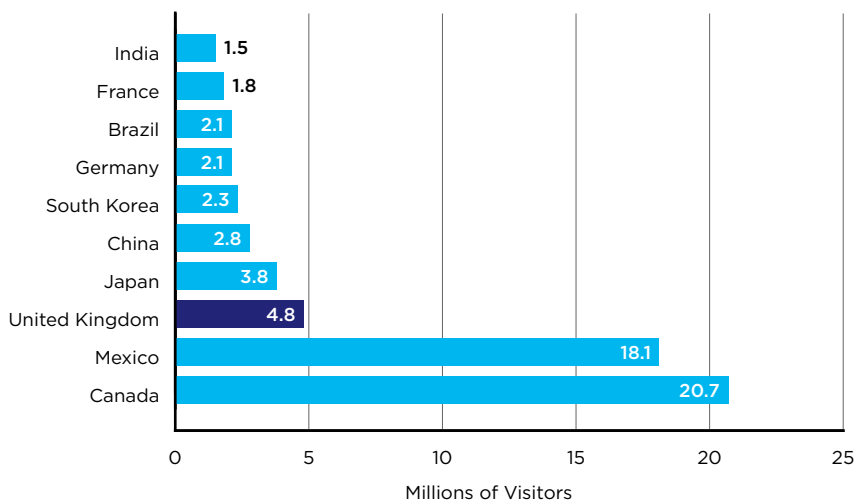
Inbound Travel Trends: United Kingdom

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: United Kingdom

Main Purpose of Trip

| Main Purpose of Trip | 2018 (%) | 2019 (%) |
|----------------------------------|----------|----------|
| Vacation/Holiday | 65.2 | 65.3 |
| Visit Friends/Relatives | 18.3 | 19.9 |
| Business | 8.6 | 8.1 |
| Convention/Conference/Trade Show | 5.7 | 4.5 |
| Education | 1.6 | 1.2 |
| Health Treatment | 0.1 | 0.5 |
| Religion/Pilgrimages | 0.1 | 0.0 |
| Other | 0.4 | 0.4 |

All Purposes of Trip

| All Purposes of Trip | 2018 (%) | 2019 (%) |
|---------------------------------------|----------|----------|
| Vacation/Holiday | 73.2 | 74.6 |
| Visit Friends/Relatives | 28.2 | 29.5 |
| Business | 10.3 | 9.6 |
| Convention/Conference/Trade Show | 7.3 | 5.9 |
| Education | 2.5 | 2.1 |
| Religion/Pilgrimages | 0.4 | 0.7 |
| Health Treatment | 0.2 | 0.2 |
| Other | 0.6 | 0.6 |
| NET PURPOSES OF TRIP | | |
| Leisure & Visit Friends and Relatives | 86.7 | 88.3 |
| Business & Convention | 16.3 | 14.2 |

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



Select Traveler Characteristics

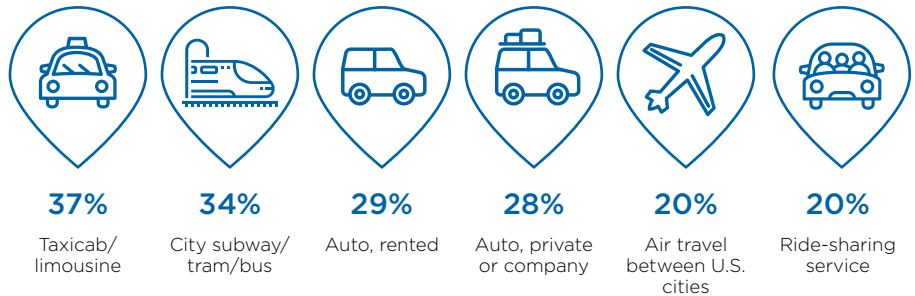
| Traveler Characteristics | 2018 | 2019 |
|---------------------------------------|-------|-------|
| Length of Stay in USA (Mean Nights) | 12.2 | 11.9 |
| Length of Stay in USA (Median Nights) | 9 | 9 |
| First International Trip to the USA | 12.3% | 13.8% |

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

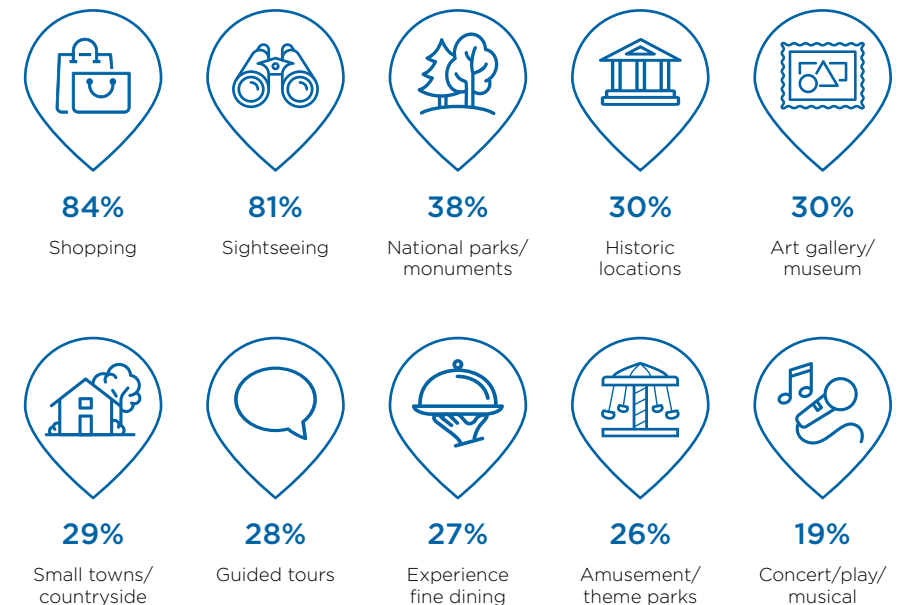
| U.S. Destinations/Regions | 2018 (%) | 2019 (%) |
|---------------------------|----------|----------|
| REGIONS | | |
| South Atlantic | 36.15 | 35.98 |
| Middle Atlantic | 30.69 | 32.41 |
| Pacific | 18.96 | 17.67 |
| Mountain | 13.88 | 13.99 |
| New England | 6.37 | 6.27 |
| West South Central | 6.21 | 6.35 |
| East North Central | 5.84 | 5.51 |
| East South Central | 2.48 | 2.18 |
| STATES/TERRITORIES | | |
| Florida | 28.16 | 28.68 |
| New York | 27.68 | 29.92 |
| California | 17.37 | 15.76 |
| Nevada | 10.46 | 10.81 |
| Massachusetts | 5.37 | 5.10 |
| CITIES | | |
| New York City | 27.29 | 29.68 |
| Orlando | 18.86 | 18.35 |
| Las Vegas | 10.35 | 10.62 |
| Los Angeles | 8.84 | 8.01 |
| San Francisco | 8.05 | 6.74 |
| Miami | 5.14 | 6.33 |

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

Transportation Used in the USA



Activity Participation While in the USA



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



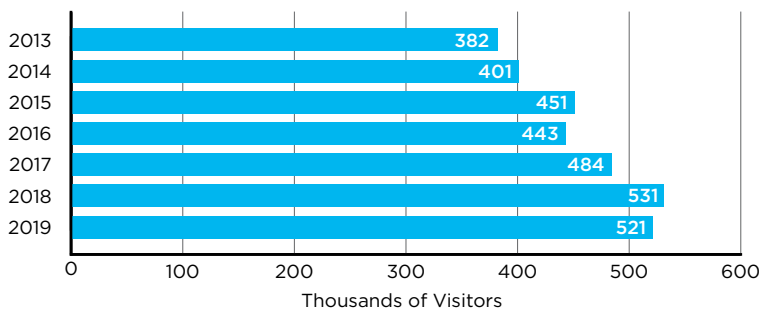
International Travel Trends: Ireland

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

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|----------|-----------|-----------|-----------|----------|----------|------------|
| Total Travel & Tourism Exports | \$1,464 | \$1,667 | \$1,851 | \$1,837 | \$1,972 | \$2,093 | OCT |
| Travel Receipts | \$1,180 | \$1,316 | \$1,501 | \$1,540 | \$1,667 | \$1,845 | OCT |
| Passenger Fare Receipts | \$284 | \$351 | \$350 | \$297 | \$305 | \$248 | OCT |
| Change (%) in Total Exports | 7 | 14 | 11 | -1 | 7 | 6 | OCT |

OCT: To be released in October 2020

Visitation Trends: Arrivals



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

Traveler Characteristics: Ireland

Main Purpose of Trip

| Main Purpose of Trip | 2018 (%) | 2019 (%) |
|----------------------------------|----------|----------|
| Vacation/Holiday | 55.0 | 54.7 |
| Visit Friends/Relatives | 22.6 | 21.6 |
| Business | 16.0 | 15.0 |
| Convention/Conference/Trade Show | 3.9 | 5.8 |
| Education | 2.4 | 1.3 |
| Health Treatment | 0.0 | 0.0 |
| Religion/Pilgrimages | 0.0 | 0.0 |
| Other | 0.0 | 1.5 |

All Purposes of Trip

| All Purposes of Trip | 2018 (%) | 2019 (%) |
|---------------------------------------|----------|----------|
| Vacation/Holiday | 65.3 | 68.4 |
| Visit Friends/Relatives | 31.5 | 35.2 |
| Business | 16.7 | 15.9 |
| Convention/Conference/Trade Show | 4.2 | 6.1 |
| Education | 3.5 | 1.4 |
| Health Treatment | 0.1 | 0.0 |
| Religion/Pilgrimages | 0.0 | 0.2 |
| Other | 0.0 | 1.8 |
| NET PURPOSES OF TRIP | | |
| Leisure & Visit Friends and Relatives | 80.5 | 82.7 |
| Business & Convention | 20.8 | 20.0 |

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



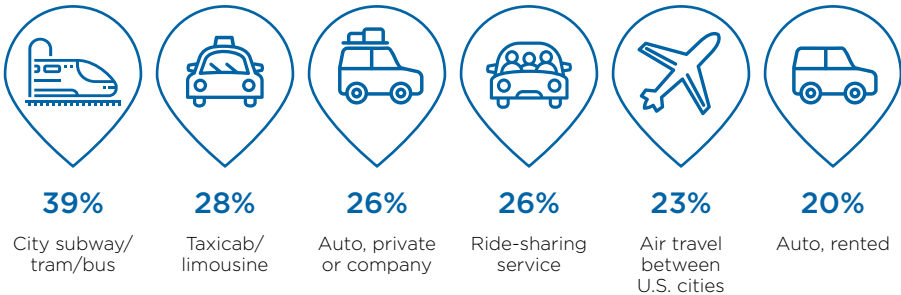
Select Traveler Characteristics

| Traveler Characteristics | 2018 | 2019 |
|---------------------------------------|-------|-------|
| Length of Stay in USA (Mean nights) | 12.7 | 12.9 |
| Length of Stay in USA (Median nights) | 7 | 6 |
| First International Trip to the USA | 15.1% | 10.8% |

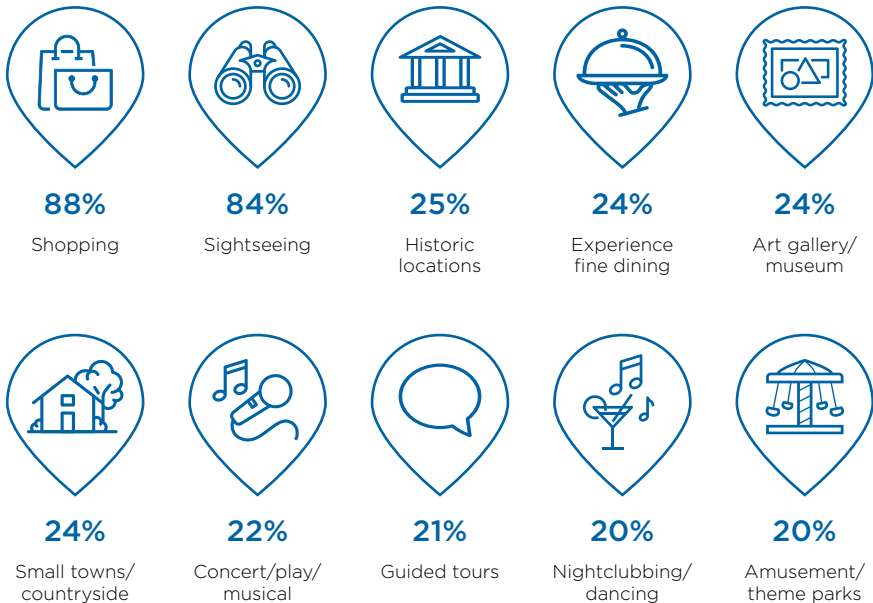
U.S. Destinations Visited (States, Cities, and Regions)

| U.S. Destinations/Regions | 2018 (%) | 2019 (%) |
|---------------------------|----------|----------|
| REGIONS | | |
| Middle Atlantic | 41.16 | 40.99 |
| South Atlantic | 23.96 | 21.13 |
| Pacific | 17.86 | 12.76 |
| STATES/TERRITORIES | | |
| New York | 37.35 | 37.11 |
| California | 16.14 | 10.96 |
| CITIES | | |
| New York City | 35.69 | 36.04 |

Transportation Used in the USA



Activity Participation While in the USA



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

Market Snapshot



United Kingdom

Political & Economic Landscape

In recent years, the United Kingdom's political landscape has been dominated by Brexit, or Britain's exit from the European Union. After three years of negotiation and leadership changes in 2019, which ultimately saw former Prime Minister Theresa May resign from office, the UK officially left the European Union in January 2020. The incumbent Prime Minister, Boris Johnson, had campaigned for Vote Leave during the referendum campaign. His Conservative Party won an unexpected landslide majority in the 2019 general election. The UK is now in negotiations with the EU until the end of 2020 to find a mutual trade deal for their future relationship.

GDP (Gross Domestic Product) was flat at the end of 2019, owing to uncertainty caused by Brexit and the snap general election. Prior to the coronavirus crisis, the impact of which began to be felt in March 2020, the UK economy showed signs of a post-election bounce.

In response to the coronavirus and the potential economic impact, the UK government introduced unprecedented measures to ensure that the UK economy was supported throughout the crisis.

The most significant intervention was the promise that the government would pay the wages of employees unable to work due to the coronavirus

It remains to be seen what the overall economic fallout will be from the crisis.

Photos: Blackpool, England (left); Stonehaven, Scotland (right)

pandemic, in a radical move aimed at protecting people's jobs. It will pay 80 percent of salary for staff who are kept on by their employer, covering wages of up to GBP2,500 per month. Chancellor Rishi Sunak said that these measures will stop workers from being laid off due to the crisis. This pledge was in addition to the GBP350 billion lifeline to the economy, which included government-backed loans to support companies and funding grants for smaller businesses.

Like many other nations globally, the UK went into lockdown between March and June as the government ordered people to stay at home and businesses to shut down to control the spread of the virus. Restrictions were lifted in June as the economy slowly reopened, with further stimulus packages from the government.

Travel Landscape

The UK is the largest overseas market for inbound USA visitation. From 2017 to 2018, visitation rose to 4,659,178—an increase of 3.9 percent. This was the highest visitation number since the record year of 2015 at 4,915,379. Visitation continued to rise from 2018 to 2019 to 4,779,997, an increase of 2.6 percent year-on-year. Forecasts illustrate the rise from 2018 to 2024 is expected to be around 16 percent, meaning the UK would represent the largest increase across Europe.

In 2017, UK travelers spent close to USD15,597 billion in the USA, retaining their spot as the third largest spending overseas market. Of travelers profiled, only 12 percent advised it was their first visit to the USA, suggesting repeat visitation is very strong in this market. The average time travelers spent in the USA was approximately 12 nights, suggesting they also traveled beyond key gateway cities.

In spite of Brexit and the collapse of Thomas Cook, the average number of holidays UK residents went on increased, rising to 3.9 breaks a year in 2019—an increase for the first time since 2011. The average number taken abroad, 1.9, was nearly as high as the average number of UK breaks (2.0). Additionally, the USA was the third most popular destination for taking



holidays (following Spain and France) and the number one long-haul destination, with 18 percent traveling here.

When booking holidays, UK travelers are twice as likely to book a foreign holiday than a domestic one in store. Those in affluent group A are likely to book in store (nearly a quarter) and those with young families are more likely than average.

Key trends in the market have included the emergence of “slow travel,” allowing consumers to experience holidays by connecting with locals and experiences and “getting away from it all,” a continued interest in the environmental aspects of travel and the continued evolution of the travel agent, with more increasing their focus on digital customer service.

Ireland

Political & Economic Landscape

In the Republic of Ireland, the Irish electorate went to the polls in February 2020 for the 2020 Irish general election to vote for the next Dáil (Irish parliament), under Ireland's single transferrable vote system of proportional representation. In Irish elections, voters rank the candidates running in their constituency in order of preference. The votes are then counted over a number of rounds. As candidates are elected or eliminated, the second, third (or lower) preference votes on that candidate's ballot paper are counted. Counting continues until all the seats have been filled. A party requires 80 seats to form a government. The vote was split between the three main parties and negotiations ran from February to June, as coalition talks were halted by the coronavirus pandemic. Fine Gael, Fianna Fáil and the Green Party agreed to form a coalition government. Ireland's new taoiseach (Irish prime minister), Micheál Martin, has said the fight against COVID-19 will be his government's first priority. As seen in the UK, and across the world, the Irish economy has also been impacted by the coronavirus, after several years of growth. Prime Minister Micheál Martin stated that his government would immediately begin preparing an investment-led jobs and recovery initiative.

Travel Landscape

The Irish market experienced two years of impressive growth in 2017 and 2018 with respective increases year-on-year of 9.2 percent and 9.8 percent respectively. In 2018, the Irish market experienced the largest percentage growth of any Western European country. This resulted in visitation figures of 483,615 in 2017 and 530,802 in 2018.

In 2019, these numbers softened with a 1.9 percent decrease in visitation to 520,692. However, this is still higher than visitation figures from the years of 2011 to 2017. The Irish market is forecasted to increase by 14 percent between 2018–2024. In terms of spend, Irish travelers to the USA spent USD1,974 billion, an increase of 7 percent from 2016 to 2017.

In 2018, the Irish market experienced the largest percentage growth of any Western European country.

When planning holidays, 57 percent of Irish travelers used airline websites, indicating these are heavily used in this market. Personal recommendations and travel agencies also ranked highly, at around 25 percent each.

Over the last few years, Irish tour operators have promoted more complex multi-centre itineraries to the USA. These have included fly-drives related to music, and many have been focused around their direct flight gateways. Irish visitors flying directly from Ireland use the pre-clearance available at the Irish airport, meaning they can clear immigration ahead of their flight to the USA. This is an attractive facility, which Irish travelers can enjoy.

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: London, England (left); Rhossili, Wales (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 |
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GoUSA 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: United Kingdom Intercontinental travelers.



47%

Local lifestyle



46%

Cultural historic attractions



43%

Beaches/seaside attractions



31%

Dining/
gastronomy



30%

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: United Kingdom Intercontinental travelers.

39%

Friendly

36%

Energetic

36%

Adventurous

36%

Diverse

22%

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: United Kingdom Intercontinental travelers (N=1035).



51%

Websites
via computer



31%

Websites/
applications
via tablet



30%

Personal
recommendations
from friends/
family



26%

Websites/
applications
via mobile phone

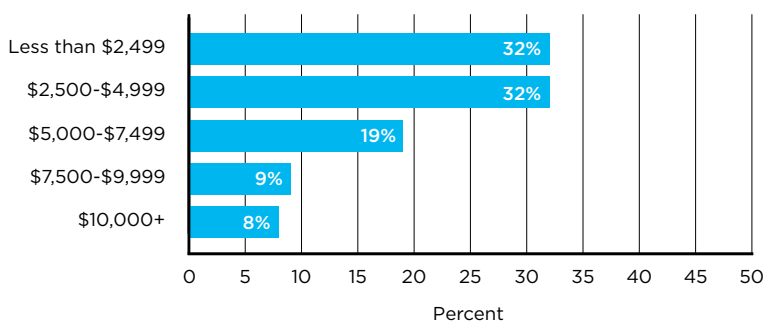


22%

Information in
printed travel
guidebooks

Expected Household Travel Spend for Next Intercontinental Trip

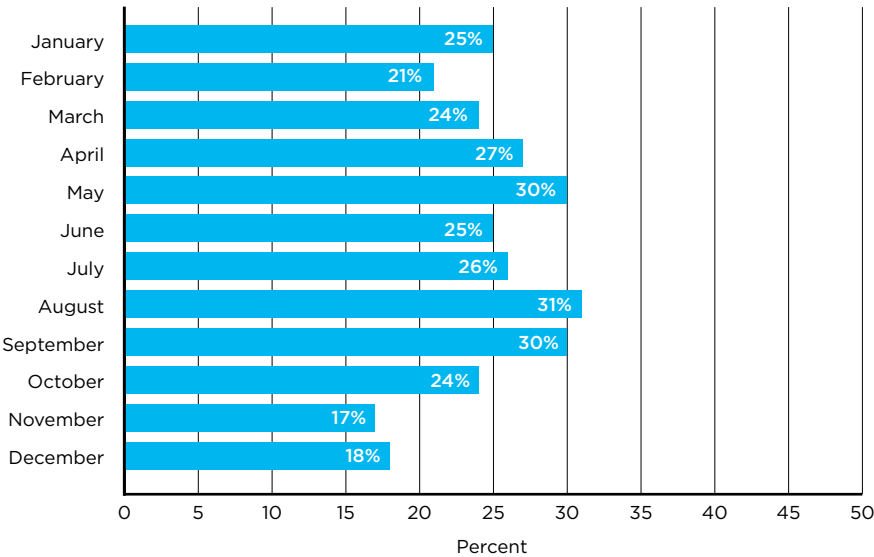
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: United Kingdom Intercontinental travelers (N=1035). Note: Totals may not add up to 100% due to rounding (Conversion GBP to USD=1.315).



Mean: \$4,773 Median: \$3,936

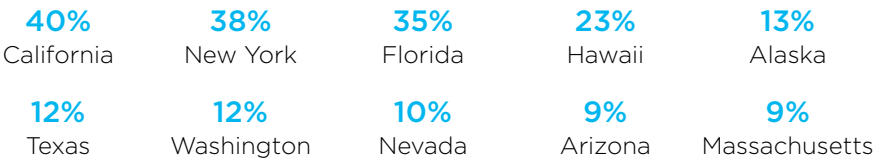
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: United Kingdom Intercontinental travelers 2019 (N=1035).



Destination Interest—Top 10 States

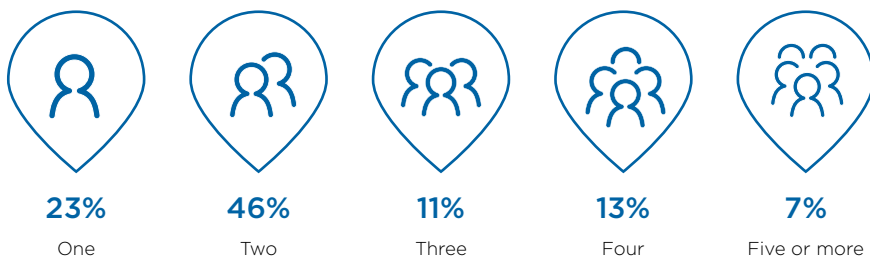
Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: United Kingdom Intercontinental travelers with interest in visiting the United States (N=980).





Expected Travel Party Size of Next Intercontinental Trip

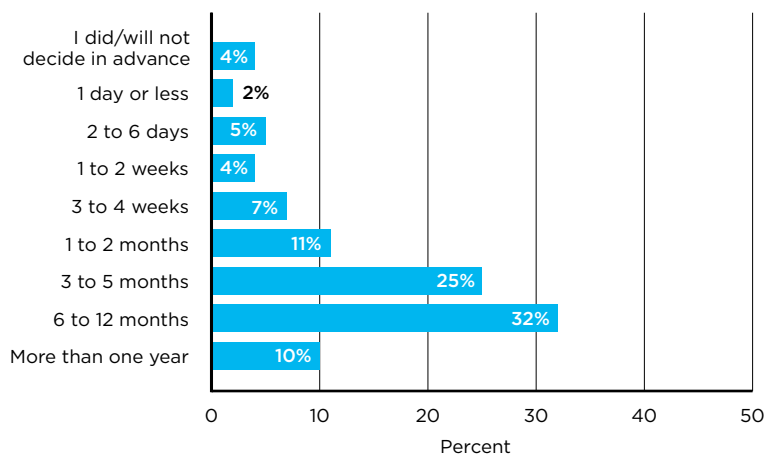
Question: Who will travel with you on this holiday? Select all that apply. Base: United Kingdom Intercontinental travelers 20197 (N=1035). Note: Totals may not add up to 100% due to rounding.



Destination Decision for Next International Trip

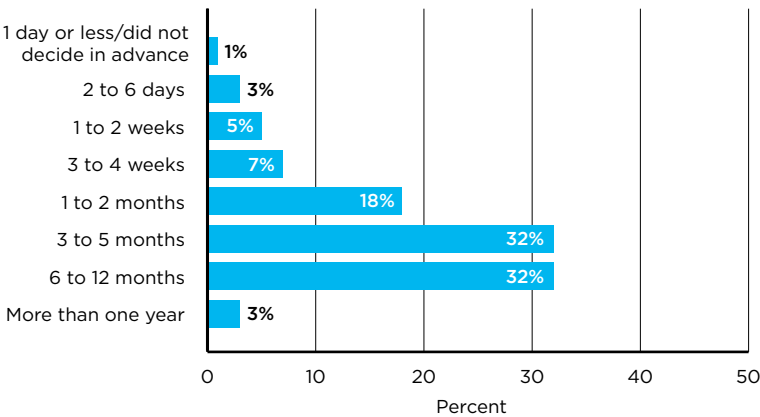
Question: How far in advance of your departure date did/will you decide on the destination?

Base: United Kingdom Intercontinental travelers 2019 (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: United Kingdom Intercontinental travelers 2019 (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: United Kingdom Intercontinental travelers (N=1035). Note: Totals may not add up to 100% due to rounding.



34%

I would bring it up to recommend as a destination



36%

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



23%

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



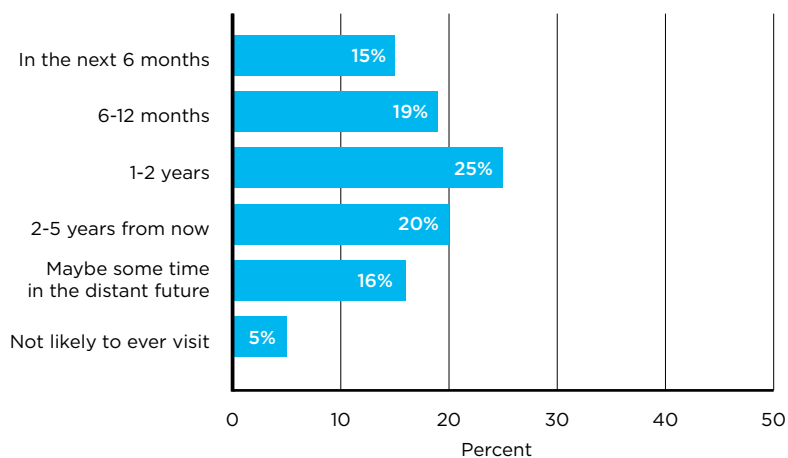
3%

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: *United Kingdom Intercontinental travelers 2017 (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

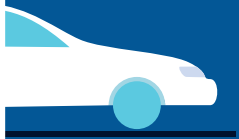
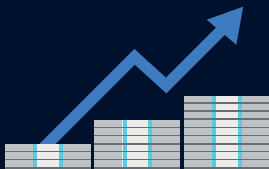


50,000+
incremental jobs
supported
each year

\$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 Association (UK) and Visit USA Committee, Ireland

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.

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*Photos: Cardiff, Wales (left); Glendalough, Ireland (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

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U.S. Department of Commerce
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The U.S. Commercial Service

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



The USCS is the trade promotion arm of the U.S.

Department of Commerce's International Trade

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

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

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8.3.20