



USA

VisitTheUSA.mx

Brand USA

Market Information

MEXICO

2019

About This Guide

Brand USA is pleased to present this guide in partnership with the U.S. Commercial Service and the National Travel and Tourism Office (NTTO). It includes snapshots of the economy in Mexico, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Brand USA.....	4
Who We Are.....	4
A Message from Christopher L. Thompson.....	6
Brand USA Executive & Senior Leadership.....	8
Market Facts	9
Geography	9
Demographics.....	10
Economy	10
Vacation Allocation.....	11
Travel Trends	12
International Travel Trends.....	12
Inbound Travel Trends	13
Traveler Characteristics.....	14
Air Travel Information	17
Market Snapshot.....	26
Brand USA Resources	28
Online Channels.....	28
Brand USA Traveler Research.....	31
Highlights of Success.....	37
Brand USA Markets.....	39
Brand USA Partnerships.....	41
About the U.S. Department of Commerce.....	41

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 in close partnership with more than 900 partner 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: Caribbean style courtyard, Mexico City (left); Our Lady of Remedies in Cholula, Mexico (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 six years Brand USA's marketing initiatives have helped welcome nearly 7 million incremental visitors to the USA, benefiting the U.S. economy with \$47.7 billion in total economic impact and supporting nearly 52,000 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



The team at Brand USA, the public-private partnership established to promote international tourism to the USA, looks forward to working with you to generate business in the outbound-travel sectors of Mexico.

This guide will familiarize you with the factors that make the dynamic Mexican marketplace and its vibrant culture so appealing.

Nearly 17.8 million travelers from Mexico visited the United States during 2017, ranking second in the top 10 markets for international visitation to the USA and third for spend at \$20.2 billion. It was the fifth straight year for record spending by Mexican travelers in the United States.

Recent research among Mexican travelers showed that 89 percent of those surveyed plan to make a trip to the USA in the next five years, 39 percent would recommend the USA as a travel destination, and 24 percent would offer positive comments about the USA as a destination.

Brand USA launched a comprehensive storytelling strategy to create relevant, engaging, and authentic content, which presents the diversity of travel possibilities across the United States. This approach further encourages travelers from Mexico to visit the USA.

Our initiatives include:

- Showcasing destinations through our expanded travel-entertainment TV channel, GoUSA TV, which is available around the globe on Roku, Apple TV, and Amazon Fire TV, and coming soon to Google Chromecast. The channel offers an assortment of travel experiences across four different categories: the great outdoors, road trips, food and drink, and culture and events. Programming on GoUSA TV will expand to feature additional themes and formats, including series, films, videos, and live videos.



- Last year we premiered our giant-screen film *America's Musical Journey*, which shares the unique styles of American music, our cultural heritage, and the stories associated with iconic locations across the U.S. landscape. A Spanish-language version of the film, *Travesía Musical*, opened in Mexico. Our first giant- screen production, *National Parks Adventure*, is also available to viewers through video-on-demand streaming services.
- Our newest campaign, United Stories, features a mobile content creation lab traveling across the United States and capturing warm and welcoming stories told from local perspectives. A variety of accomplished content creators, storytellers, and influencers will bring international travelers on a journey through memorable narratives that reveal the warmth of the American people and show the many adventures across the USA that are just one road trip away.

I encourage you to talk to our team about destinations in the USA, the opportunities we offer to enhance your marketing efforts in Mexico, and find the most effective ways to inspire Mexican travelers to book their trips to the USA now.

I also invite you to review Brand USA's dedicated travel-trade website. This comprehensive gateway allows industry professionals to easily navigate information about U.S. travel.

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

Anne Madison

Chief Strategy &

Communications Officer

AMadison@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

Cathleen Domanico

Vice President, Global Trade

Development

CDomanico@TheBrandUSA.com

Tracy Lanza

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

Vice President, Public Policy

& Public Affairs

AWodinSchwartz@TheBrandUSA.com

Market Facts



Geography

Area

377,915 km²

Largest Metropolitan Areas



Photos: Caribbean hacienda, ranch plaza (left); Angel of Independence, Mexico City (right)

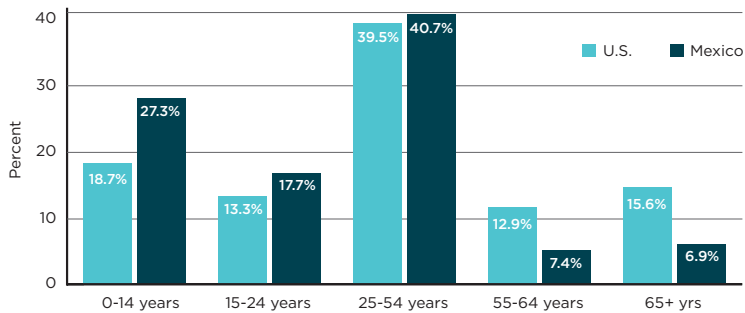
Source: CIA World Factbook 2018

Demographics

Population

	Mexico	USA
Population size	126,829,000	329,256,465
World rank	10	3
Median age	46.5 years	37.8 years
Population growth rate (2015 est.)	-0.16%	0.78%

Population by Age



Economy

- **GDP:** \$2.571 trillion
- **GDP real growth rate:** 2.0%
- **GDP—per capita:** \$9,318
- **Unemployment rate:** 3.4%
- **Inflation rate:** 4.7%

Source: CIA World Factbook 2018



Vacation Allocation

Salaried Mexican employees earn an average of six days of paid vacation each year.

Mexico has seven national holidays, four religious holidays, and one or two state and city holidays each year.

Primary Travel Periods

- **Summer holidays:** six weeks of school vacation, July
- **Easter holidays and Holy Week:** two weeks of school vacation, March or April
- **Christmas holidays:** two weeks, December into January

Public School Holidays

- **Spring:** 2–3 weeks (late March to early April)
- **Summer:** 5–6 weeks (late July through end of August)
- **Winter:** 2–3 weeks (late December to early January)

Travel Trends

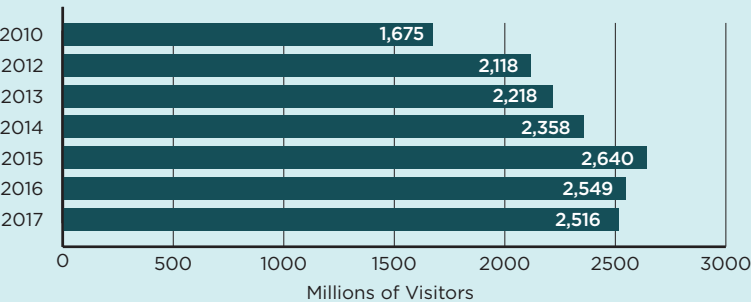


International Travel Trends

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

	2008	2009	2010	2011	2012	2013	2014	2015	Change
Total Travel & Tourism Exports	\$5,121	\$5,235	\$7,603	\$9,983	\$11,343	\$12,419	\$13,429	\$14,388	\$9,267
Travel Receipts	\$3,949	\$3,988	\$5,846	\$7,411	\$8,531	\$9,247	\$9,247	\$11,072	\$7,123
Passenger Fare Receipts	\$1,172	\$1,247	\$1,757	\$2,572	\$2,812	\$3,172	\$3,172	\$3,316	\$2,144
Change (%) in Total Exports	33	2	45	31	14	9	5	3	181

Visitation Trends: Arrivals

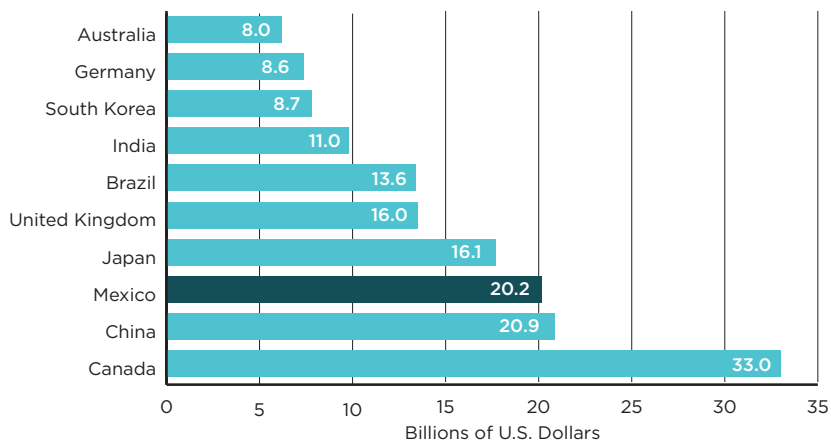


Photos: San Miguel de Allende (left), Traditional rodeo in Mexico City (right)
 Source: U.S. Department of Commerce, National Travel and Tourism Office



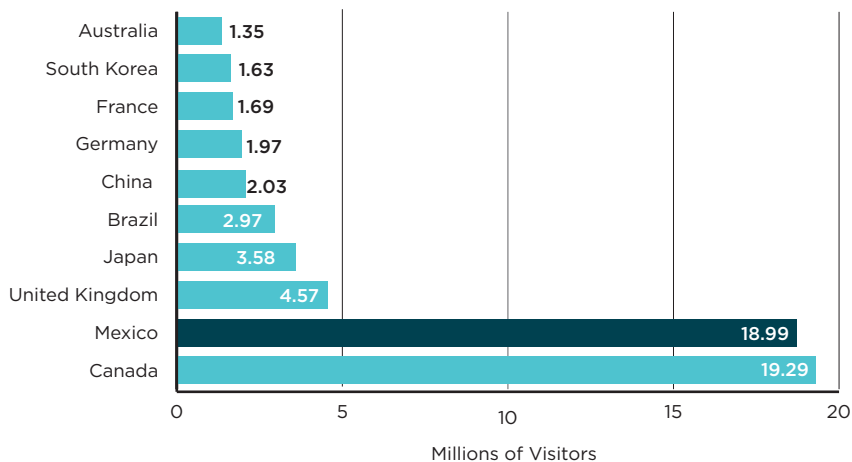
Inbound Travel Trends

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	2016 (%)	2017 (%)
Vacation/Holiday	51	50
Business	19	23
Visit Friends/Relatives	17.4	16.2
Convention/Conference/Trade Show	7	7
Education	5	2
Health Treatment	0.2	0.2
Religion/Pilgrimages	0.1	0.5

Select Traveler Characteristics

Traveler Characteristics	2016 (%)	2017 (%)
Length of Stay in USA (Mean Nights)	11	12
Length of Stay in USA (Median Nights)	6	6
First International Trip to the USA	10	10

Activity Participation While in the USA

Activities	2016 (%)	2017 (%)
Shopping	85	83
Sightseeing	85	87
Experience Fine Dining	39	25
Water Sports	24	20
Guided Tours	20	22
National Parks/Monuments	12	12
Historic Locations	11	12
Art Gallery/Museum	9	8
Small Towns/Countryside	11	10
Amusement/Theme Parks	10	12

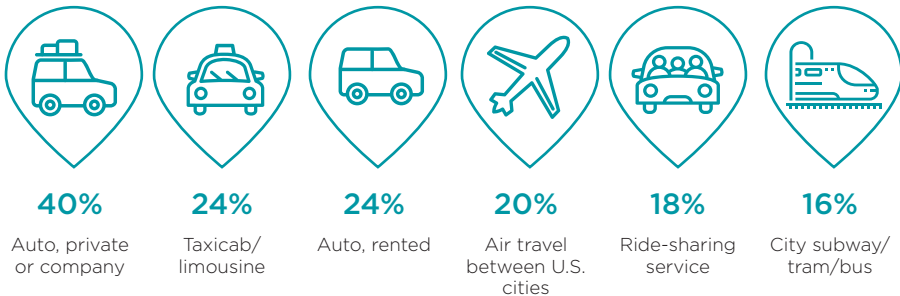
Source: U.S. Department of Commerce, National Travel and Tourism Office



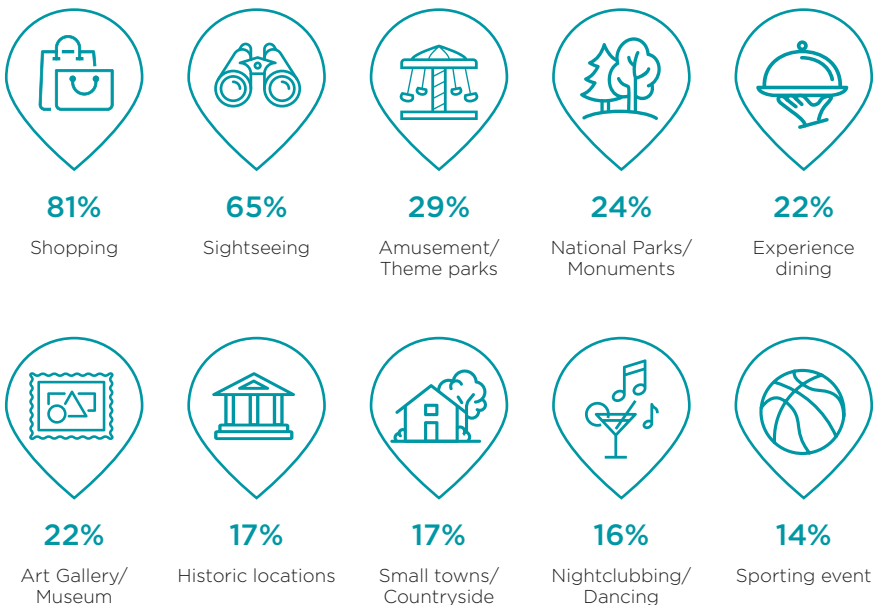
U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/ Regions	Market Share 2016 (%)	Market Share 2017 (%)
REGIONS		
East North Central	11	12
Middle Atlantic	12	13
Mountain	16	16
Pacific	20	21
South Atlantic	26	23
West South Central	19	18
STATES/TERRITORIES		
Illinois	8	8
New York	10	12
Nevada	11	11
California	19	19
Florida	21	17
Texas	18	17
CITIES		
Chicago	8	8
New York City	10	12
Las Vegas	11	11
Los Angeles	12	12
Miami	11	9
Orlando	9	8
Houston	11	10

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



Volaris, Interjet and Aeroméxico are Mexico's major domestic airlines that connect the country with the main cities in the United States. Volaris—which flies to New York, Houston, Fort Lauderdale, Orlando, Phoenix, Denver and San Juan among others—has 60 U.S.-bound routes, while Aeroméxico has 38 and Interjet has 23 routes.

Viva Aerobus, a low-cost Mexican carrier, recently started operating flights to Las Vegas, Houston, Los Angeles, Chicago, and New York. The flights leave from Mexico City, Monterrey, Guadalajara, and Cancun.

Mexico City to the USA

Route	Airline
Los Angeles	Aeroméxico
Los Angeles	Alaska Airlines
Los Angeles	American Airlines
Los Angeles	Delta Air Lines
Los Angeles	Interjet
Los Angeles	United Airlines
Los Angeles	Volaris
Los Angeles	Aeroméxico
New York JFK	Delta Air Lines
New York JFK	Interjet
New York JFK	JetBlue
New York JFK	VivaAerobus
New York JFK	Volaris

Photos: San Cristobal (left); Taxco City (right)

Source: Brand USA Proprietary Research

Route	Airline
Houston George Bush	Aeroméxico
Houston George Bush	Interjet
Houston George Bush	United Airlines
Dallas/Fort Worth	Aeroméxico
Dallas/Fort Worth	American Airlines
Dallas/Fort Worth	Interjet
Miami	Aeroméxico
Miami	American Airlines
Miami	Interjet
Miami	Volaris
Chicago O'Hare	Aeroméxico
Chicago O'Hare	Interjet
Chicago O'Hare	United Airlines
Chicago O'Hare	Volaris

Monterrey to the USA

Route	Airline
Houston George Bush	Interjet
Houston George Bush	United Airlines
Houston George Bush	VivaAerobus
Dallas/Fort Worth	American Airlines
Atlanta	Aeroméxico
Atlanta	Delta Air Lines
Orlando	Aeromexico
Detroit	Aeroméxico
Detroit	Delta Air Lines
Chicago O'Hare	United Airlines
Chicago O'Hare	Volaris
Las Vegas	Aeroméxico
Las Vegas	Interjet



Route	Airline
Las Vegas	VivaAerobus
Los Angeles	Aeroméxico
New York JFK	Aeroméxico
San Antonio	Interjet
Miami	American Airlines
Denver	Aeroméxico
Denver	Volaris
Phoenix	United Airlines

Cancun to the USA

Route	Airline
Dallas/Fort Worth	American Airlines
Dallas/Fort Worth	Spirit Airlines
Dallas/Fort Worth	Sun Country Airlines
Houston George Bush	Spirit Airlines
Houston George Bush	United Airlines
New York JFK	American Airlines
New York JFK	Delta Air Lines
New York JFK	Interjet
New York JFK	JetBlue
Atlanta	Delta Air Lines
Atlanta	Southwest Airlines
Atlanta	Volaris
Miami	American Airlines
Chicago O'Hare	American Airlines
Chicago O'Hare	Spirit Airlines
Chicago O'Hare	United Airlines
Chicago O'Hare	VivaAerobus
Los Angeles	Delta Air Lines

Route	Airline
Los Angeles	Interjet
Los Angeles	Southwest Airlines
Los Angeles	United Airlines
Los Angeles	United Airlines
Newark	VivaAerobus
Fort Lauderdale	JetBlue
Fort Lauderdale	Southwest Airlines
Fort Lauderdale	Spirit Airlines
Fort Lauderdale	Charlotte
Fort Lauderdale	American Airlines
Minneapolis	Delta Air Lines
Minneapolis	Sun Country Airlines
Denver	Southwest Airlines
Denver	United Airlines
San Francisco	Interjet
San Francisco	United Airlines
San Francisco	Virgin America
Detroit	Delta Air Lines
Detroit	Spirit Airlines
Baltimore-Washington	Delta Air Lines
Baltimore-Washington	Southwest Airlines
Baltimore-Washington	Spirit Airlines
Philadelphia	American Airlines
Washington Dulles	Delta Air Lines
Washington Dulles	United Airlines
Phoenix	American Airlines
Houston W. P. Hobby	Southwest Airlines
Orlando	Delta Air Lines
Orlando	JetBlue
Chicago Midway	Southwest Airlines



Route	Airline
Salt Lake City	Delta Air Lines
Destination	Routes
Boston	American Airlines
Boston	Delta Air Lines
Boston	JetBlue

Guadalajara to the USA

Route	Airline
Los Angeles	Aeroméxico
Los Angeles	Interjet
Los Angeles	VivaAerobus
Los Angeles	Volaris
Los Angeles	United Airlines
Houston George Bush	Volaris
Chicago O'Hare	Aeroméxico
Chicago O'Hare	Interjet
Chicago O'Hare	Volaris
Sacramento	Aeroméxico
Sacramento	Volaris
San José	Aeroméxico
San José	Volaris
Dallas/Fort Worth	American Airlines
Dallas/Fort Worth	Volaris
Fresno	Aeroméxico
Fresno	Volaris
San Francisco	Aeroméxico
San Francisco	Interjet
San Francisco	Volaris
Atlanta	Aeroméxico

Route	Airline
Atlanta	Delta Air Lines
Las Vegas	Interjet
Las Vegas	Volaris
Phoenix	American Airlines
Phoenix	Volaris
Ontario	Volaris
Oakland	Volaris
Chicago Midway	Volaris
Portland	Volaris
New York JFK	Volaris
Salt Lake City	Aeroméxico
Miami	Volaris
San Antonio	Interjet
San Antonio	Volaris
Seattle/Tacoma	Volaris
Destination	Routes
Denver	Volaris
Orlando	Volaris
Reno	Volaris
Austin	Volaris
Milwaukee	Volaris

Other routes:

Acapulco-Los Angeles (Volaris)

Acapuco-Houston (United Airlines)

Culiacán-Phoenix (Volaris)

Huatulco-Chicago (Volaris)

Huatulco-Houston (United Airlines)

Huatulco-Minneapolis (Sun Country Airlines)

León-Los Angeles (Aeroméxico, Interjet, United Airlines, Volaris)

León-Houston (United Airlines)

León-Dallas (American Airlines)



León-Atlanta (Aeroméxico)
León-Chicago (Volaris)
León-Oakland (Volaris)
León-Detroit (Aeroméxico)
Manzanillo-Houston (United Airlines)
Manzanillo-Phoenix (American Airlines)
Manzanillo-Minneapolis (Sun Country Airlines)
Mérida-Houston (United Airlines)
Mérida-Atlanta (Aeroméxico)
Mérida-Miami (American Airlines)
Morelia-Los Angeles (Volaris)
Morelia-Chicago (Volaris)
Morelia-Oakland (Volaris)
Morelia-Dallas (American Airlines)
Morelia-San José (Volaris)
Morelia-Houston (United Airlines)
Morelia-Fresno (Volaris)
Puebla-Houston (United Airlines)
Puebla-Dallas (American Airlines)
Querétaro-Houston (United Airlines)
Querétaro-Dallas (American Airlines)
Querétaro-Atlanta (American Airlines)
Querétaro-Chicago (Volaris)
Querétaro-Los Angeles (Volaris)
San Luis Potosí-Dallas (American Airlines)
San Luis Potosí-Houston (United Airlines)
Aguascalientes-Dallas (American Airlines)
Aguascalientes-Houston (United Airlines)
Aguascalientes-Los Angeles (Volaris)
Chihuahua-Dallas (American Airlines)
Chihuahua-Houston (United Airlines)
Chihuahua-Denver (Volaris)
Cozumel-Dallas (American Airlines & Sun Country Airlines)
Cozumel-Atlanta (Delta Airlines)

Cozumel-Houston (United Airlines)
Cozumel-Miami (American Airlines)
Cozumel-Minneapolis (Delta Airlines, Sun Country Airlines)
Cozumel-Charlotte (American Airlines)
Cozumel-Chicago (American Airlines & United Airlines)
Cozumel-Denver (United Airlines)
Cozumel-Detroit (Delta Airlines)
Durango-Chicago (Volaris)
Durango-Los Angeles (Volaris)
Hermosillo-Phoenix (American Airlines)
Ixtapa-Zihuanajuato-Chicago (United Airlines & Volaris)
Ixtapa-Zihuanajuato-Houston (United Airlines)
Ixtapa-Zihuanajuato-Minneapolis (Delta Airlines & Sun Country Airlines)
Ixtapa-Zihuatanejo-Phonenix (American Airlines)
Ixtapa-Zihuatanejo-Dallas (American Airlines)
Mazatlán-Phoenix (American Airlines)
Mazatlán-Dallas (American Airlines)
Mazatlán-Minneapolis (Delta Airlines & Sun Country Airlines)
Mazatlán-Houston (United Airlines)
Mazatlán-Los Angeles (American Airlines)
Mazatlán-Chicago (United Airlines)
Mazatlán-Denver (Sun Country Airlines)
Oaxaca-Los Angeles (Volaris)
Oaxaca-Houston (United Airlines)
Puerto Vallarta-Los Angeles (American Airlines, Delta, Interjet, Southwest, United Airlines, Virigin America, Volaris)
Puerto Vallarta-Dallas (United Airlines & Sun Country Airlines)
Puerto Vallarta-Phoeniex (American Airlines)
Puerto Vallarta-Houston (United Airlines)
Puerto Vallarta-Chicago (American Airlines & United Airlines)
Puerto Vallarta-San Francisco (United Airlines & Virgin America)
Puerto Vallarta-Denver (Southwest Airlines & United Airlines)
Puerto Vallarta-Atlanta (Delta Airlines)
Puerto Vallarta-Minneapolis (Delta Airlines & Sun Country Airlines)



Puerto Vallarta-Houston (Southwest Airlines)
Puerto Vallarta-Oakland (Southwest Airlines)
Puerto Vallarta-Salt Lake City (Delta Airlines)
Puerto Vallarta-Newark (United Airlines)
Puerto Vallarta-Detroit (Delta Airlines)
Puerto Vallarta-San Diego (Delta Airlines)
Puerto Vallarta-Seattle/Tacoma (Delta Airlines)
San Jose del Cabo-Los Angeles (American Airlines, Delta, Interjet, Southwest, United)
San José del Cabo-Dallas (American Airlines & Spirit Airlines)
San José del Cabo-Phoenix (American Airlines)
San José del Cabo-Houston (Spirit Airlines & United Airlines)
San José del Cabo-San Francisco (United Airlines and Virgin America)
San José del Cabo-Chicago (American Airlines & United Airlines)
San José del Cabo-Denver (Southwest Airlines & United Airlines)
San José del Cabo-Atlanta (Delta Airlines)
San José del Cabo-Houston (Southwest Airlines)
San Jose del Cabo-Oakland (Southwest Airlines)
San José del Cabo-San Diego (Southwest Airlines)
San José del Cabo-Salt Lake City (Delta Airlines)
San José del Cabo-Santa Ana (Southwest Airlines)
San José del Cabo-Minneapolis (Delta Airlines & Sun Country Airlines)
San José del Cabo-Newark
San José del Cabo-Detroit
San José del Cabo-Charlotte
San José del Cabo-Seattle
San José del Cabo-San José
San José del Cabo-Sacramento
San José del Cabo-New York JFK
San José del Cabo-Baltimore-Washington
San José del Cabo-Washington Dulles (United Airlines)
San José del Cabo-Austin
San José del Cabo-Las Vegas
Tampico-Houston (United Airlines)

Source: Dirección General de Aeronáutica Civil (DGAC), from the Ministry of Communications and Transports of Mexico

Market Snapshot



- In 2016, Canada and Mexico were still the top source markets for international arrivals to the United States. About 19.3 million Canadians had overnight stays, which was 6.8 percent less than the previous year. The number of Mexican travelers who spent an overnight in the United States during 2016 was close to 19 million—a 1.9 percent increase over 2015.
- Mexico—as the second-largest source market for international visitation to the United States during 2016—is a top-priority market with strong, long-term prospects. The 2016 level of Mexican arrivals in the United States continued seven years of growth. Also, Mexican travelers to the USA are second only to the Chinese in terms of international spend.
- According to the most recent National Travel and Tourism Office forecast, the United States is expected to see a 14.5 percent increase in visitor volume over the next five years.
- Mexico's slow GDP growth, its unfavorable exchange rate with the dollar, and Mexican elections could lead to sluggish travel volume. Despite this, Mexico will likely be a vital service-export market for the United States.
- Though demand from Mexico has softened, Brand USA research in December 2017 found that 81 percent of Mexican international travelers were likely to visit the USA during the following two years, up from 78 percent in December 2016.
- A recent study by the Mexican Internet Association (AMIPCI in Spanish) showed that Mexico has 70 million internet users, which represents 63 percent of its population. Mexicans spend eight hours a day on the internet, on average. This reflects a 10 percent jump over the year before.

Photos: Outdoor food market, Mexico City (left); traditional Mexican costume (right)



- Social media is the most popular online activity among Mexicans. Other top online activities include: accessing email, searching for information, shopping, and arranging finances. Facebook is still the most relevant social media platform in Mexico, while the use of Instagram, LinkedIn, and Snapchat are increasing.
- Smartphones are the primary device to access social media in Mexico (80 percent). This promotes the use of Snapchat, Waze, and Snapchat. Tablets are also widely used to access the internet. The dependence on desktop computers is decreasing.

In 2017, an estimated 17.3 million visitors from Mexico came to the United States. That number is expected to expand to 19.8 million annual visitors by 2022.

Travel Markets

Distribution Networks

- Tour operators and major travel agencies are the primary distributors of travel in Mexico. The country has approximately 100 tour operators. About 25 of the tour operators are based in Mexico City, with offices in other major cities, such as Monterrey and Guadalajara.
- Many specialized and mid-sized travel agencies run their own operations and group travel. About 3,000 Mexican travel agencies belong to the Mexican Association of Travel Agencies (AMAV). Preferred relationships between travel agencies and tour operators are mostly based on relationships and commission levels. Though Mexicans use the internet for trip planning and research, tour operators still originate the majority of travel sales.

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: Chichén Itzá (left); El Arco, Cabo San Lucas (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	 @VisitOsUSA  @VisitTheUSA	 facebook.com/VisitTheUSAau  YouTube.com/VisitTheUSA	#VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	 @VisitOsUSA  @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 Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA Youku (YouTube equivalent): http://youku.com/gousacn Weishi (like Vine): http://www.weishi.com/u/23484775 Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局 Lofter (Photo sharing platform): http://GoUSA.lofter.com</p>		
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/VisitTheUSAdes  YouTube.com/VisitTheUSAdes	#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	 @GoUSAjap  @VisitTheUSA	 facebook.com/GoUSAjap  YouTube.com/GoUSAjap	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=2037).

Base: Mexico Intercontinental travelers.



64%

Cultural historic attractions



54%

Dining/
gastronomy



49%

Urban attractions



47%

Local lifestyle



43%

Shopping

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=2037). Base: Mexico Intercontinental travelers.

45%

Diverse

38%

Trendy

36%

Down-to-earth

31%

Adventurous

29%

Open-minded

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: Mexico Intercontinental travelers (N=2037).



67%

Websites
via computer



47%

Information in
printed travel
guidebooks



45%

Websites/
applications
via mobile phone



39%

Websites/
applications
via tablet

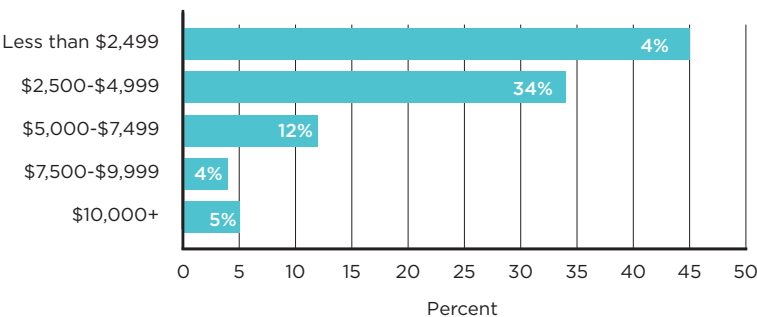


24%

Online
advertising/
email

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: Mexico Intercontinental travelers (N=2037). Note: Totals may not add up to 100% due to rounding (Conversion MXN to USD= 0.053).

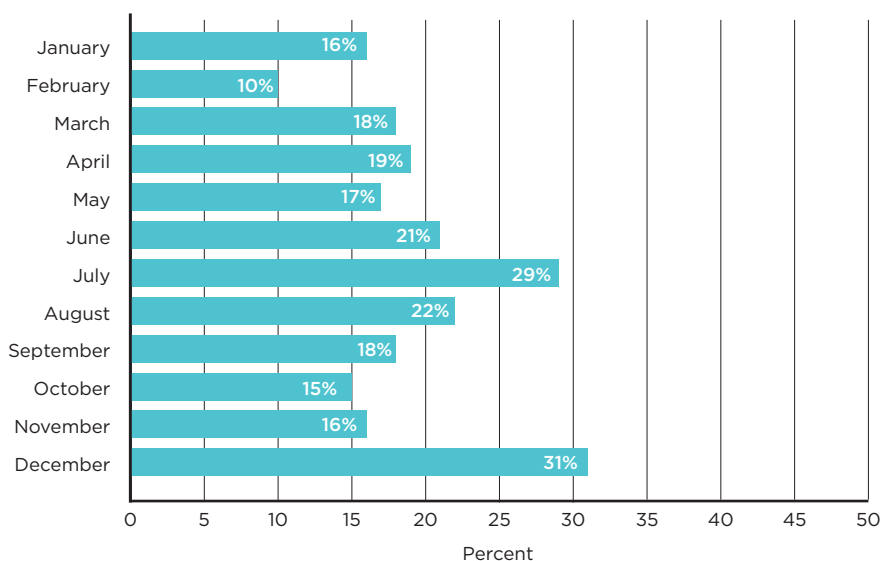


Mean: \$3,694 **Median:** \$2,650



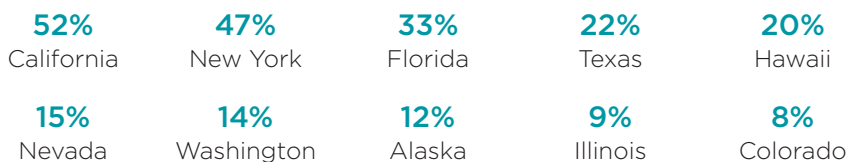
Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: Mexico Intercontinental travelers 2017 (N=2037).



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: Mexico Intercontinental travelers with interest in visiting the United States (N=1911).



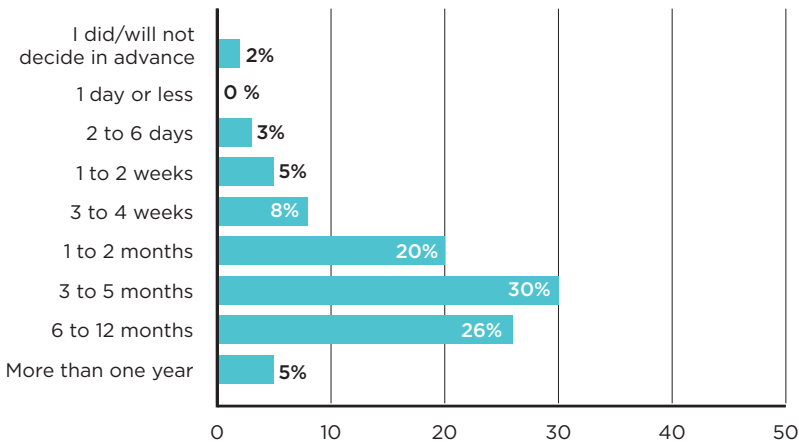
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Mexico Intercontinental travelers 2017 (N=2037). Note: Totals may not add up to 100% due to rounding.



Destination Decision for Next International Trip

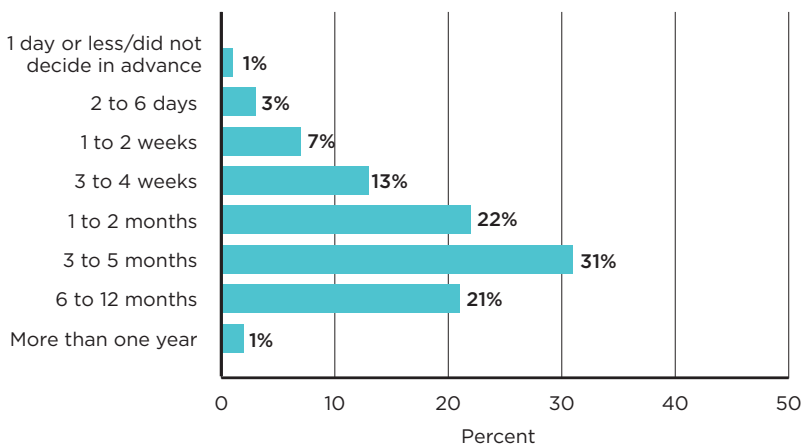
Question: How far in advance of your departure date did/will you decide on the destination? Base: Mexico Intercontinental travelers 2017 (N=2037). Note: Totals may not add up to 100% due to rounding.





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: Mexico Intercontinental travelers 2017 (N=2037). 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: Mexico Intercontinental travelers (N=2037). Note: Totals may not add up to 100% due to rounding.



43%

I would bring it up to recommend as a destination



27%

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



17%

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



6%

I would tell people negative things if it were brought up

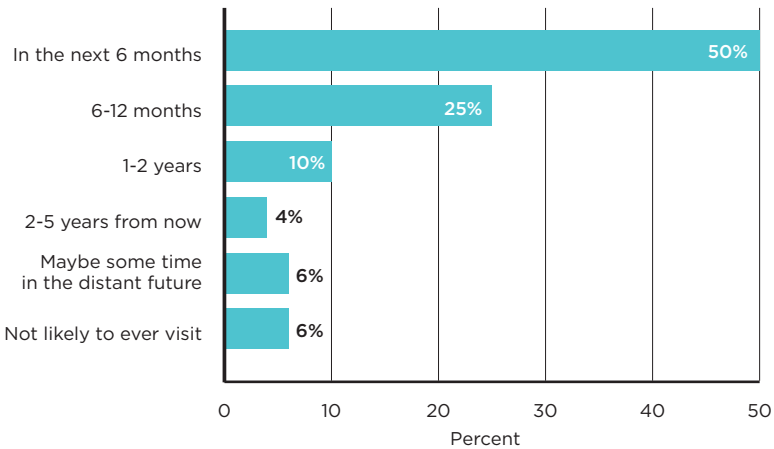


6%

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: Mexico Intercontinental travelers 2017 (N=2037).





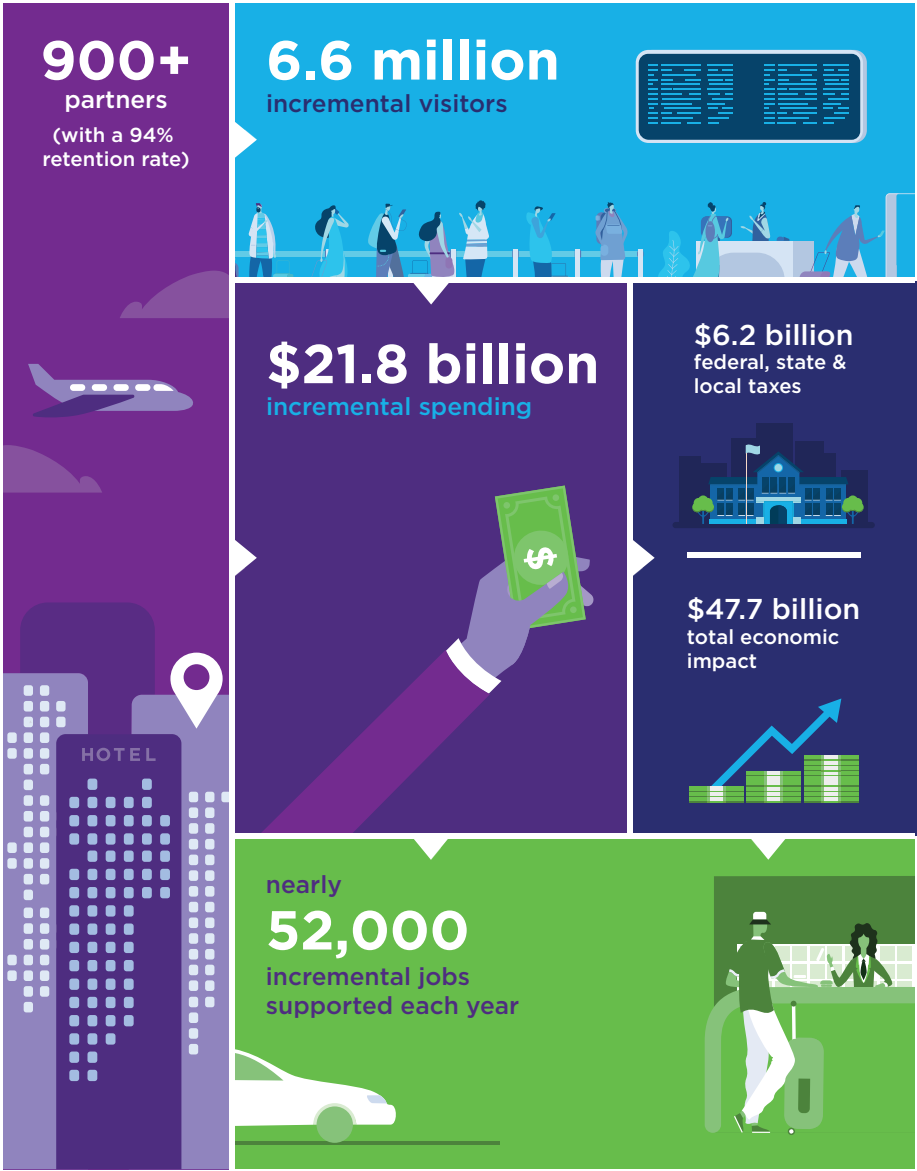
Highlights of Success

Brand USA is building on success. With the support of its many partners worldwide, Brand USA has grown from a start-up organization (that launched its first full year in operation in 2012 with just 89 partners) to an organization that has worked with and been supported by over 900 partners worldwide.

Here is some of what we've accomplished together so far:

- Welcomed nearly 7 million incremental international visitors to the USA over the past six years, which has benefited the U.S. economy with \$47.7 billion in total economic impact and supported, on average, nearly 52,000 incremental jobs a year (source: Oxford Economics).
- Increased the number of international travelers coming to the United States to, through, and beyond the gateways.
- Established consumer and trade marketing initiatives in more than 40 international markets, which generate 90 percent of all inbound travel to the United States.
- Created the first connected TV channel by a national destination marketing organization.
- Delivered trailblazing content that resonates with travelers worldwide and can be enjoyed on virtually any platform—from mobile to the giant screen and everything in between.
- Produced two award-winning giant-screen films that are inspiring hundreds of millions of travelers to come to the USA.
- Organized the industry's first MegaFam—which has brought hundreds of top-tier travel buyers to the USA.
- Pioneered a range of cooperative marketing programs and platforms that are enabling U.S. destinations of all shapes and sizes to connect with international travelers like never before.
- Established partnerships with destinations and travel brands from all 50 states, the five territories, and the District of Columbia.
- Maintained a partnership retention rate of over 90 percent.

Over the past six years, Brand USA's marketing efforts have generated...





- Built a model public-private partnership—working with all tourism-related federal agencies to promote and leverage the economic and social benefit of travel and extend a warm welcome to international travelers throughout the world.
- Supported our federal partners in accurately communicating information about U.S. entry policies and, importantly, correcting misperceptions about those policies.
- Kept overhead expenses to below 10 percent each year since our founding—devoting more than 90 percent of Brand USA's resources toward marketing and programs to increase international visitation.

By all these measures and more, Brand USA's marketing efforts are working—effectively and efficiently.

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 | • China | • India | • Sweden |
| • Brazil | • Colombia | • Japan | • United Kingdom |
| • Canada | • France | • Mexico | |
| • Chile | • Germany | • South Korea | |

These 14 international markets generate more than 80 percent of inbound travel to the United States. 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, including:

- Albania
- Angola
- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- Equatorial Guinea
- Finland
- France
- Gabon
- Germany
- Guatemala
- Guyana
- Honduras
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Italy
- Japan
- Kenya
- Kuwait
- Lithuania
- Luxembourg
- Mexico
- Morocco
- Mozambique
- Nepal
- Netherlands
- New Zealand
- Norway
- Oman
- Panama
- Paraguay
- Peru
- Philippines
- Portugal
- Romania
- Saudi Arabia
- South Africa
- Tanzania
- Ukraine
- United Arab Emirates
- Uruguay
- Vietnam
- Zambia
- Zimbabwe

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, administering joint marketing efforts, providing official travel and tourism statistics, and coordinating 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: Guanajuato (left); Costa Maya (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; and
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.

Contact:

The NTTO is located in the International Trade Administration of the Department of Commerce.

14th & 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
Deputy Director
Julie.Heizer@trade.gov

Brian Beall
Deputy Director, Policy and Planning
Brian.Beall@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

The U.S. Commercial Service (USCS) is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration (ITA). 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 service 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. Our specialists in Mexico can be reached at the contact details below.

U.S. Commercial Service, Mexico City

Juan Carlos Ruiz

Commercial Assistant

juancarlos.ruiz@trade.gov

TheBrandUSA.com

6.3.19