



VisitTheUSA.au

Brand USA

Market Information

AUSTRALIA
& NEW ZEALAND

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 economies in Australia and New Zealand 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 in close partnership with more than 800 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: Sydney, Australia (left); Uluru-Kata Tjuta National Park, Australia (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 Australian and New Zealand outbound-travel sectors.

This guide will familiarize you with the factors that make the Australian and New Zealand markets and cultures so appealing.

Australia ranks as the 10th largest source market for overseas visitation to the United States, as approximately 1.3 million Australians traveled to our country during 2017. And, Australians ranked number 9 in the top 10 spend for international visitors to the United States that year, having spent a total of \$8.5 billion.

It is significant to note that 73 percent of Australians who visit the United States schedule a return visit. Repeat visitors are incentivized by the competition among air carriers, which keeps fares low.

Brand USA has created a comprehensive storytelling strategy to present the diversity of travel possibilities across the United States. The content varies between still imagery and short and long-form videos and is shared across different mediums from mobile to giant-screens and everything in between. This approach allows us to provide the right message, at the right time, to the right people, in the right manner, and shares relevant and authentic perspectives from locals and visitors to inspire new and different travel experiences within the USA.

Brand USA provides Australians and New Zealanders the unique opportunity to see the United States even before they travel, to further encourage them 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.

- Brand USA's second giant-screen film, *America's Musical Journey*, shares the unique styles of American music, our cultural heritage, and the stories associated with iconic locations across the U.S. landscape. The film has premiered in Australia and New Zealand and is available at giant-screen theaters throughout the region. Our first giant-screen production, *National Parks Adventure*, also is available to viewers through streaming services that offer video-on-demand.
- 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 Australia and New Zealand, and the most effective ways to inspire travelers to act now and book their trips to the USA.

Also, remember to review Brand USA's dedicated travel-trade website. This comprehensive gateway allows industry professionals to easily navigate information about U.S. travel. In the Australia and New Zealand markets—with nearly 25,000 retail travel agents and on-site travel agencies—this website will surely make a difference.

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

Australia

7,741,220 km²

New Zealand

268,838 km²

Climate

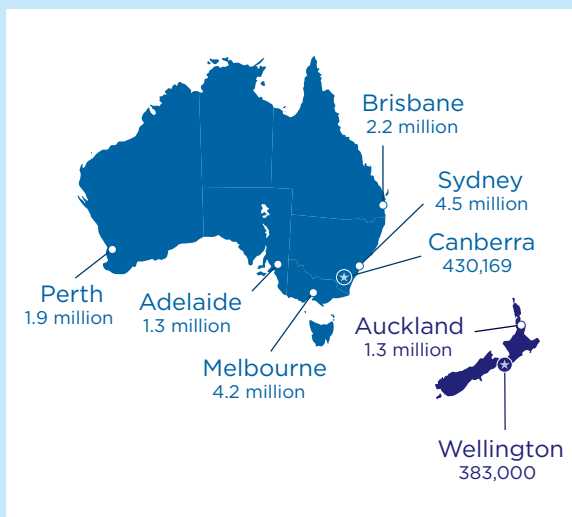
Australia

Generally arid to semiarid; temperate in south and east; tropical in north.

New Zealand

Temperate with sharp regional contrasts.

Largest Metropolitan Areas



Photos: Kaikoura, NZ (left); Gold Coast, Australia (right)

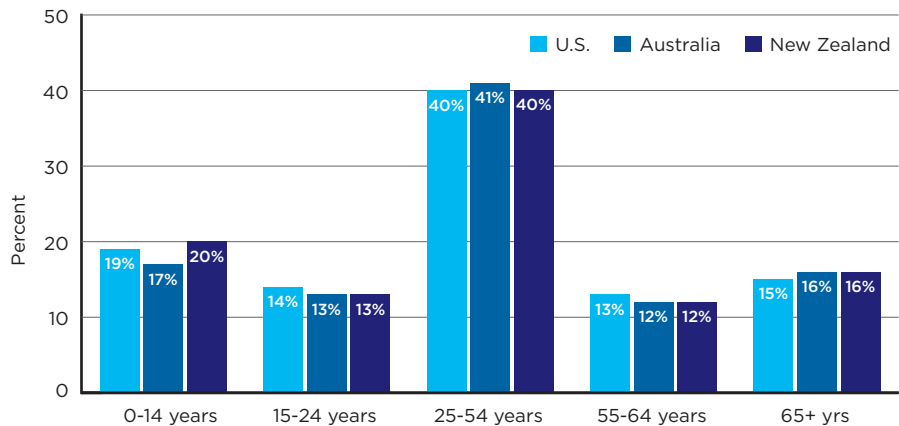
Source: CIA World Factbook 2018

Demographics

Population

	Australia	New Zealand	USA
Population Size	23,470,145	4,545,627	329,256,465
Median Age	38.8 years	38.1 years	38.2 years
Population Growth Rate (2018 Est.)	1.01%	0.77%	0.8%

Population by Age



Economy

Australia

- **GDP:** \$1.248 trillion (2017 est.)
- **GDP Real Growth Rate:** 2.2% (2017 est.)
- **GDP—Per Capita:** \$50,400 (2017 est.)
- **Unemployment Rate:** 5.6% (2017 est.)
- **Inflation Rate:** 2%

Source: CIA World Factbook 2019



New Zealand

- **GDP:** \$189 billion (2017 est.)
- **GDP Real Growth Rate:** 3% (2017 est.)
- **GDP—Per Capita:** \$39,000 (2017 est.)
- **Unemployment Rate:** 4.9% (2017 est.)
- **Inflation Rate:** 1.9%

Vacation Allocation

National Public Holidays, 2019

Australia

- **New Year's Day:** Tuesday, Jan. 1
- **Australia Day:** Monday, Jan. 28
- **Good Friday:** April 19
- **Easter Monday:** April 22
- **ANZAC Day:** Thursday, April 25
- **Queen's Birthday:** Monday, June 10
- **Labor Day:** Monday, Oct. 7
- **Christmas Day:** Wednesday, Dec. 25
- **Boxing Day:** Thursday, Dec. 26

New Zealand

- **New Year's Day:** Tuesday, Jan. 1
- **Day after New Year's Day:** Wednesday, Jan. 2
- **Waitangi Day:** Wednesday, Feb. 6
- **Good Friday:** April 19
- **Easter Monday:** April 22
- **ANZAC Day:** Thursday, April 25
- **Queen's Birthday:** Monday, June 3
- **Labor Day, Monday:** Oct. 28
- **Christmas Day:** Wednesday, Dec. 25
- **Boxing Day:** Thursday, Dec. 26

Travel Trends

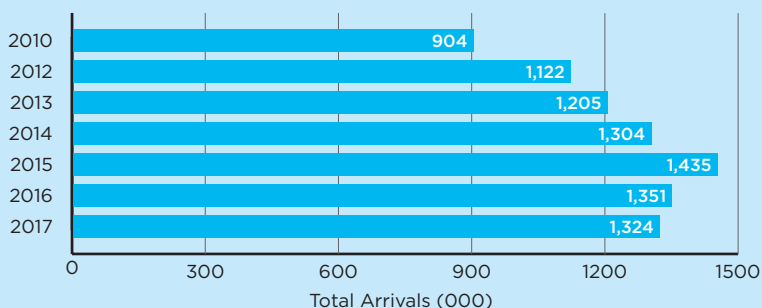


International Travel Trends: Australia

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

	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	\$5,937	\$6,368	\$7,764	\$8,568	\$9,412	\$8,756	\$8,480
Travel Receipts	\$5,445	\$5,622	\$6,986	\$7,706	\$8,571	\$7,962	\$7,682
Passenger Fare Receipts	\$492	\$746	\$778	\$862	\$841	\$794	\$798
Change (%) in Total Exports	35	-4	22	10	10	-7	-3

Visitation Trends: Arrivals



Photos: Melbourne, Australia (left); Wellington, New Zealand (right)

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

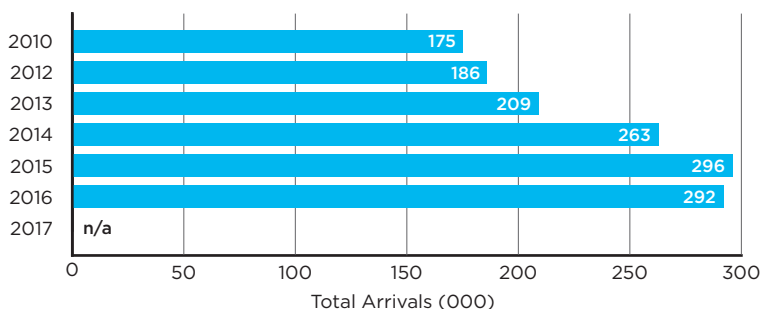


International Travel Trends: New Zealand

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

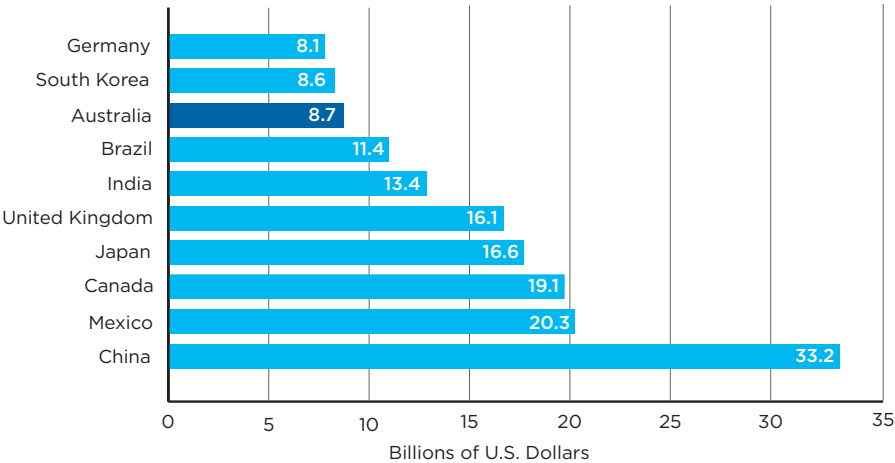
	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	\$614	\$850	\$940	\$1,155	\$1,288	\$1,257	n/a
Travel Receipts	\$615	\$851	\$850	\$1,084	\$1,253	\$1,229	n/a
Passenger Fare Receipts	(1)	(1)	\$90	\$71	\$35	\$29	n/a
Change (%) in Total Exports	20	20	11	23	12	-2	n/a

Visitation Trends: Arrivals



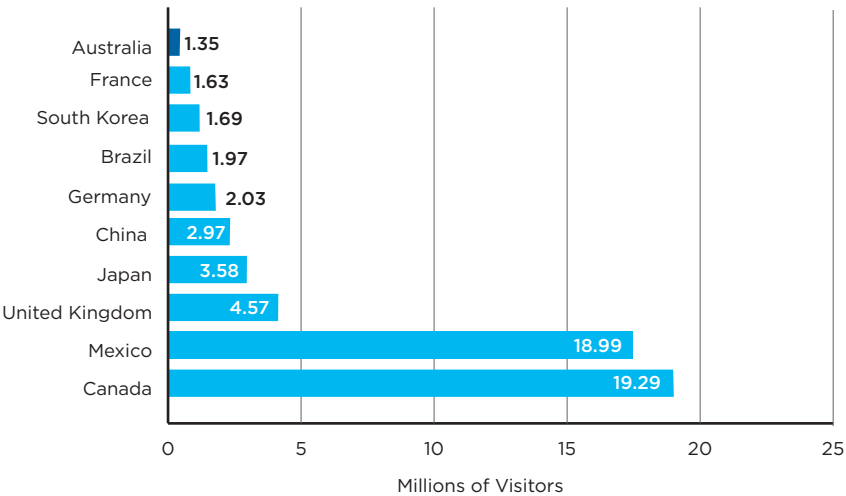
Inbound Travel Trends: Australia

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: Australia

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	69	72
Business	5	5
Visit Friends/Relatives	16	15
Convention/Conference/Trade Show	6	6
Education	3	2
Health Treatment	0.3	0.1
Religion/Pilgrimages	0.3	0.2

All Purposes of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	81	82
Visit Friends/Relatives	31	31
Business	7	7
Convention/Conference/Trade Show	8	8
Education	5	3
Religion/Pilgrimages	0.5	0.6
Health Treatment	0.5	0.1
Other	0.6	0.5

NET PURPOSES OF TRIP

Leisure & Visit Friends and Relatives	91	92
Business & Convention	14	14

Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean Nights)	22.3	18.7
Length of Stay in USA (Median Nights)	14	14
First International Trip to the USA	26.6%	28.1%

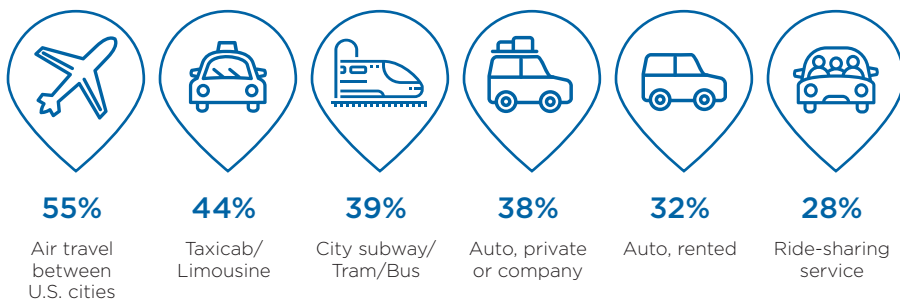
U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/ Regions	2016 (%)	2017 (%)
REGIONS		
Middle Atlantic	28.03	26.25
Mountain	27.25	23.89
Pacific	52.53	48.85
Pacific Islands	27.47	26.97
South Atlantic	20.13	17.93
East North Central	11.61	10.83
STATES/TERRITORIES		
New York	27.27	24.87
Nevada	22.01	18.38
California	49.28	46.18
Hawaii	27.35	26.83
Florida	11.93	11.26
Texas	7.97	7.44
CITIES		
New York City	26.66	24.73
Las Vegas	21.06	17.76
Los Angeles	31.45	31.38
San Francisco	19.58	17.30
Honolulu/Oahu	23.4	24.43

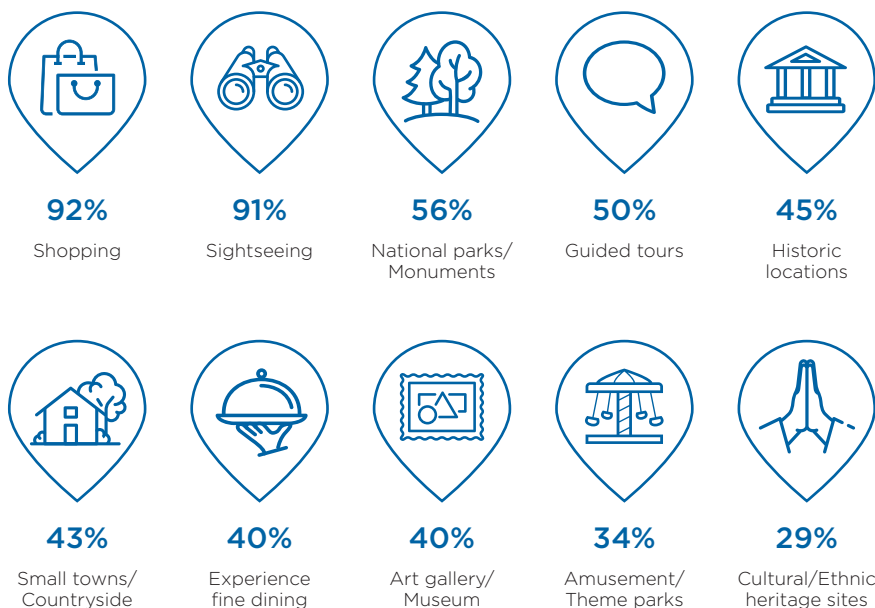
Source: U.S. Department of Commerce, National Travel and Tourism Office



Transportation Used in the USA



Activity Participation While in the USA



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

Traveler Characteristics: New Zealand

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	64	n/a
Business	5	n/a
Visit Friends/Relatives	21	n/a
Convention/Conference/Trade Show	8	n/a
Education	1	n/a
Health Treatment	0.0	n/a
Religion/Pilgrimages	2	n/a

All Purposes of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	80	n/a
Visit Friends/Relatives	39	n/a
Business	8	n/a
Convention/Conference/Trade Show	10	n/a
Education	3	n/a
Religion/Pilgrimages	1	n/a
Health Treatment	0.3	n/a
Other	0.0	n/a

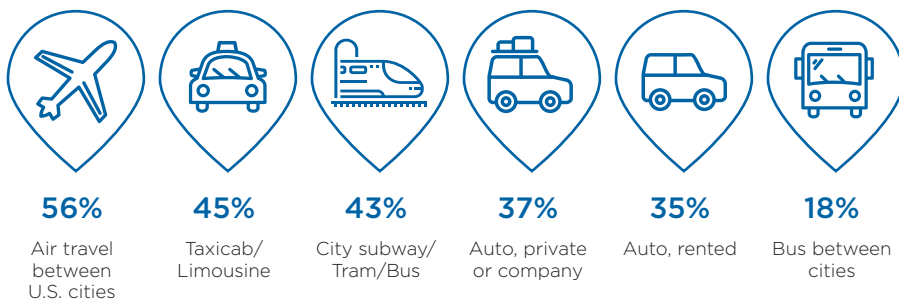
Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean Nights)	16.2	n/a
Length of Stay in USA (Median Nights)	12	n/a
First International Trip to the USA	18%	n/a

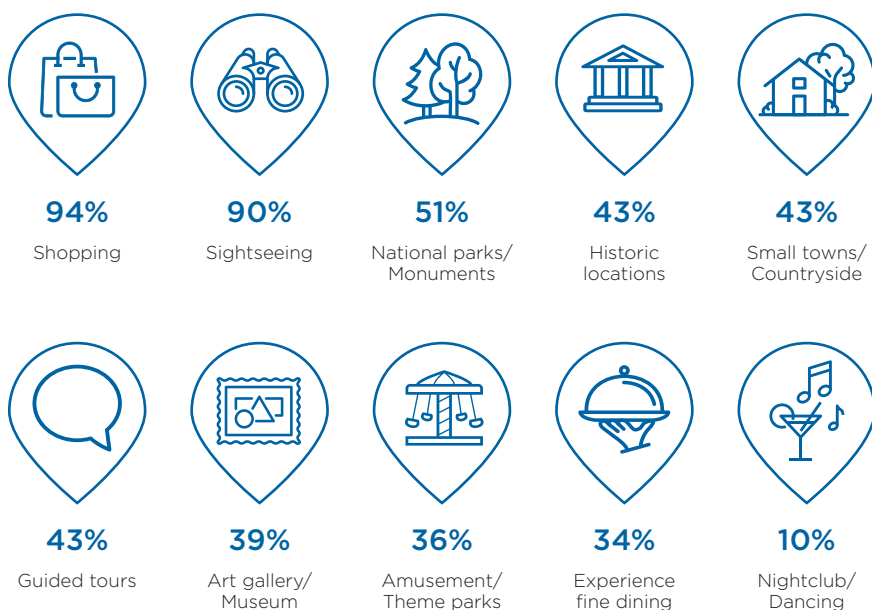
Source: U.S. Department of Commerce, National Travel and Tourism Office



Transportation Used in the USA



Activity Participation While in the USA



Air Travel Information



Non-Stop Flights from Australia to the USA

Flights To	Flights From	Airline
Dallas Fort Worth (DFW)	Sydney (SYD)	Qantas
Honolulu (HNL)	Brisbane (BNE)	Hawaiian Airlines
Honolulu (HNL)	Melbourne (MEL)	Jetstar
Honolulu (HNL)	Sydney (SYD)	Jetstar
Honolulu (HNL)	Sydney (SYD)	Qantas
Honolulu (HNL)	Sydney (SYD)	Hawaiian Airlines
Houston (IAH)	Sydney (SYD)	United Airlines
Los Angeles (LAX)	Brisbane (BNE)	Qantas
Los Angeles (LAX)	Brisbane (BNE)	Virgin Australia
Los Angeles (LAX)	Melbourne (MEL)	Qantas
Los Angeles (LAX)	Melbourne (MEL)	United Airlines
Los Angeles (LAX)	Melbourne (MEL)	Virgin Australia
Los Angeles (LAX)	Sydney (SYD)	American Airlines
Los Angeles (LAX)	Sydney (SYD)	Delta
Los Angeles (LAX)	Sydney (SYD)	Qantas
Los Angeles (LAX)	Sydney (SYD)	United Airlines
Los Angeles (LAX)	Sydney (SYD)	Virgin Australia
San Francisco (SFO)	Melbourne (MEL)	Qantas
San Francisco (SFO)	Sydney (SYD)	Qantas
San Francisco (SFO)	Sydney (SYD)	United Airlines

Photos: Geothermal Springs, Wai-O-Tapu, New Zealand (left); Brisbane, Australia (right)

Source: Brand USA Proprietary Research



Non-Stop Flights from New Zealand to the USA

Flights To	Flights From	Airline
Chicago (ORD)	Auckland (AKL)	Air New Zealand
Chicago (ORD)	Auckland (AKL)	United Airlines
Honolulu (HNL)	Auckland (AKL)	Air New Zealand
Honolulu (HNL)	Auckland (AKL)	Hawaiian Airlines
Houston (IAH)	Auckland (AKL)	Air New Zealand
Los Angeles (LAX)	Auckland (AKL)	Air New Zealand
Los Angeles (LAX)	Auckland (AKL)	American Airlines
San Francisco (SFO)	Auckland (AKL)	Air New Zealand
San Francisco (SFO)	Auckland (AKL)	United Airlines

Market Snapshot



Australians and New Zealanders have consistently placed the USA at the top of their bucket list in recent years. As such, visitation has grown significantly, having more than doubled in the past 10 years. Despite this, overall visitation from Australia dropped two percent in 2017, and visitation growth from New Zealand was just 0.4 percent. Visitation, however, is forecasted to be back to growth for 2018 arrivals.

The USA is the number one long-haul destination from Australia and New Zealand. Currently, six percent of Australia and New Zealand's population visits the USA each year. Repeat visitation is increasing (73 percent currently), as is the appetite from consumers and media to discover a wider range of U.S. destinations and experiences.

Intention to travel is also extremely strong. The USA is the highest-ranking destination that Australians intend to visit in the next two years. Approximately 17.9 percent

of Australians who are planning an overseas holiday intend to visit the USA. Intention to travel to the USA has increased year-over-year by 0.5 percent. That makes the USA the top destination of intended travel, ahead of competitor destinations such as the UK (13.7 percent intent to travel), Canada (8.2 percent), and Japan (8.1 percent)

The number of Australians visiting the USA has more than doubled in the past 10 years.

Photos: Sydney, Australia (left); Piha Beach, Auckland, New Zealand (right)

Source: Roy Morgan Single Source Australia, December 2015 - November 2016, n = 14,348 & December 2016 - November 2017, n = 15,145. Base: Australians 14+.



Australia and New Zealand remain important markets for inbound travel to the USA. Australians and New Zealanders travel farther, stay longer, and spend more in the United States than many other inbound markets. The average length of stay for Australians is 22 days, higher than the average for all overseas visitors (18 days). The average number of states visited per trip by travelers from this market is 2.1. This propensity to travel to, through, and beyond the gateways makes Australia and New Zealand desirable markets, despite the challenges of relatively small populations and distance to travel to the USA.

Australia ranks as the ninth largest market for international visitor spend in the USA, despite having the smallest population of any nation in the top 10 markets.

Travel Markets Summary

Australia and New Zealand are enjoying a period of economic stability. In fact, Australia has posted 27 years of unbroken growth without a recession—a world record. Over recent years, steady continuous GDP growth, stable exchange rates, high employment rates, and low interest rates have all resulted in high consumer confidence. Australia and New Zealand, however, are facing economic challenges in line with the overall global slowdown. Specific local challenges are impacted by stalled wage growth, a cooling of the housing market, and a steady decline of currency against the U.S. dollar throughout 2018.

Despite the economic challenges, desire to travel overseas remains at an all-time high. A 2018 Roy Morgan survey reported that 11.4 percent of the population plans to travel overseas in the next 12 months. That represents an increase compared to the year before, which itself was a record year.

Australia has posted 27 years of unbroken growth without a recession—a world record.

Travelers from this market tend to be relatively resilient to socio-economic and political factors, which appear to have less impact on their intention to

Sources: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office. Roy Morgan Single Source Australia data.

travel. Living in remote island nations, Australians and New Zealanders are accustomed to traveling internationally for their vacations.

The other key factor in visitation is airlift/airfares. Airlift to the USA from Australia and New Zealand is at record high levels, pushing fares down to record lows. Fares have dropped by more than 30 percent over the past five years. The average return airfare to Los Angeles can be as low as \$850, the equivalent of just three days of the average wage. It has never been so affordable to travel to the USA. In addition, new routes are opening, increasing competition and decreasing travel time to southern and eastern USA. In 2018, the following new routes were launched: United Sydney to Houston, Qantas Melbourne to San Francisco, and Air New Zealand Auckland to Chicago. United has announced it will start flying Melbourne to San Francisco in October 2019.

Australians and New Zealanders travel to the United States primarily for leisure trips. According to the U.S. Department of Commerce National Travel and Tourism Office, 85 percent travel for holidays or visiting friends and relatives (VFR). Only six percent visit for conventions, conferences, and trade shows, and five percent visit for general business travel.

Once in the United States, Australian travelers participate in various leisure-type activities: 92 percent shop; 90 percent sightsee; 57 percent visit a national park or monument; 48 percent visit historic locations, 40 percent seek fine dining, and 40 percent go to art galleries or museums.

The peak season for U.S. travel by Australians and New Zealanders runs June through September—peak season in the United States—and winter “down under.” Smaller spikes in U.S. arrivals occur in December and January, coinciding with school holidays in Australia and New Zealand. As travel frequency increases, however, the trend sees a flattening out of the booking season.

The top five sources for researching a holiday are: directly with airlines (49 percent); online travel agency (46 percent); travel agency office (39 percent); personal recommendation (38 percent); and travel guides (20 percent). Both travel agents and the internet play important roles in the research and booking process.



Australia and New Zealand remain one of the rare markets in the world where consumers will research online and offline and then walk into a physical store to make their booking with an agent. Working with, educating, and incentivizing agents are key parts of the best practice approach in this market. The retail travel industry network remains a crucial influencer on travel decision-making. There are currently approximately 3,500 retail travel agency locations operating in Australia and 311 in New Zealand. Home-based “travel managers” are increasing in numbers, competing with high levels of customer service, well-established clientele, and a bespoke approach.

Most of the wholesale distribution within Australia and New Zealand firmly occurs between the two dominant players—Flight Centre Travel Group (Infinity Holidays) and Helloworld Travel Group (Qantas Holidays and Viva Holidays). They claim about 60 percent of the market. House of Travel is also a key player in the New Zealand market. The remaining percentage of wholesale distribution is split between other specialist wholesalers, including Excite Holidays and Adventure World.

The internet’s role has strengthened over recent years, following a long period of fragmentation occurring with small independents across the online travel space in Australia and New Zealand. The majority of

The online travel agency sector is smaller in Australia and New Zealand than many other developed markets.

the distribution, however, now involves the two global dominant players—Expedia and Booking Holdings. The only independent of note is Webjet. The online travel agency sector is smaller in Australia and New Zealand than many other developed markets.

New Developments

For the Australian and New Zealand travel sector, 2018 was another year of change, consolidation, and growth.

Flight Centre announced it would be eliminating three brands—Escape Travel, Cruiseabout and My Adventure Travel—in order to grow its leisure

market share. The stores were consolidated into Flight Centre or Travel Associates brands. In addition, the Infinity branded brochures are being phased out and rebranded as either Flight Centre or Travel Associates.

Early in 2018, Helloworld completed the purchase of Magellan Group. They also acquired Asia Escape Holidays, Flight Systems, and Show Group Enterprises. These acquisitions and the strength of their corporate business have resulted in a jump in profits.

Qantas launched history-making, non-stop flights from Perth to London. This has created a new term of “ultra-long travel,” and other nonstop routes are being considered, including Sydney to New York City.

Air New Zealand and Virgin Australia ended their codeshare and reciprocal rights partnership. Air New Zealand signed a new partnership with Qantas.

There were many company closures in 2018, with Si Holidays, Venture Far, and online travel agent Bestjet all ceasing business.

The trend of ever-increasing representation of U.S. direct marketing organizations in the Australia and New Zealand market continues, with Colorado Tourism the latest to join the 35 plus other U.S. destinations with representatives in market.

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: Karijini National Park, Australia (left); Piha Beach, Wellington, New Zealand (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
- **Great Outdoors:** #OutdoorsUSA
- **Flavors/Culinary:** #TasteUSA
- **Market the Welcome:**
#USAWelcome
- **Road Trips:** #RoadTripUSA

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	frVisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSAcA @VisitTheUSA	facebook.com/VisitTheUSAcA YouTube.com/VisitTheUSAFr #VisitTheUSA
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	@VisitTheUSAes @VisitTheUSA	facebook.com/VisitTheUSACl YouTube.com/VisitTheUSAes #VisitTheUSA
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	<p>Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn 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>	#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
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=1058).

Base: Australia intercontinental travelers.



56%

Cultural/Historic attractions



54%

Local lifestyle



41%

Shopping



36%

Beaches/Seaside attractions



35%

Urban attractions

Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1024). Base: Australia intercontinental travelers.

39%

Diverse

35%

Adventurous

32%

Friendly

29%

Energetic

29%

Arrogant



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: Australia intercontinental travelers (N=1058).



63%

Websites
via computer



39%

Personal
recommendations
from family and
friends



30%

Websites/
applications
via mobile phone



28%

Websites/
applications
via tablet

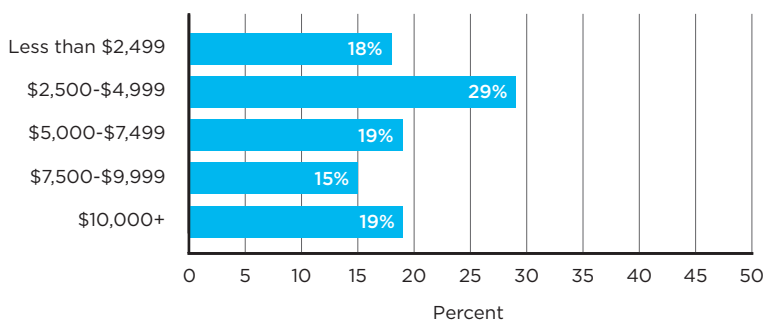


23%

Personal advice
from travel
professionals/
travel agents

Expected Household Travel Spend for Next Intercontinental Trip

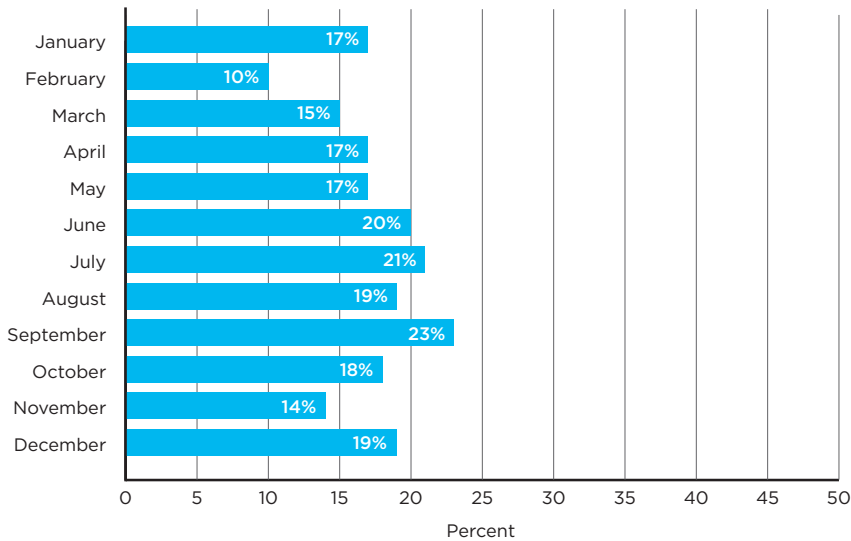
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/ Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Australia intercontinental travelers (N=1058). (Conversion AUD to USD= 0.762).



Mean: \$6,840 **Median:** \$5,334

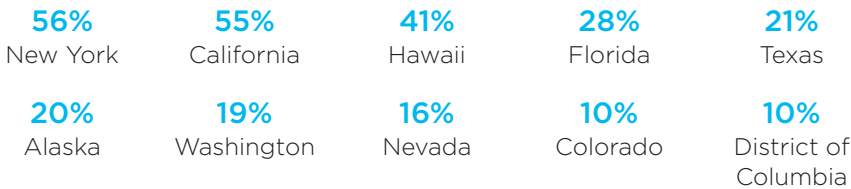
Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: Australia intercontinental travelers 2018 (N=1058).



Destination Interest—Top 10 States

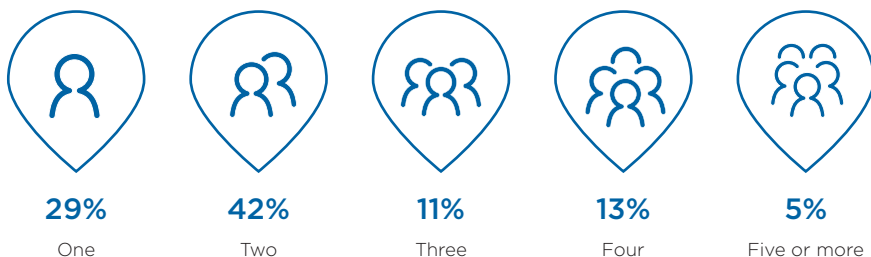
Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: Australia intercontinental travelers with interest in visiting the United States (N=959).





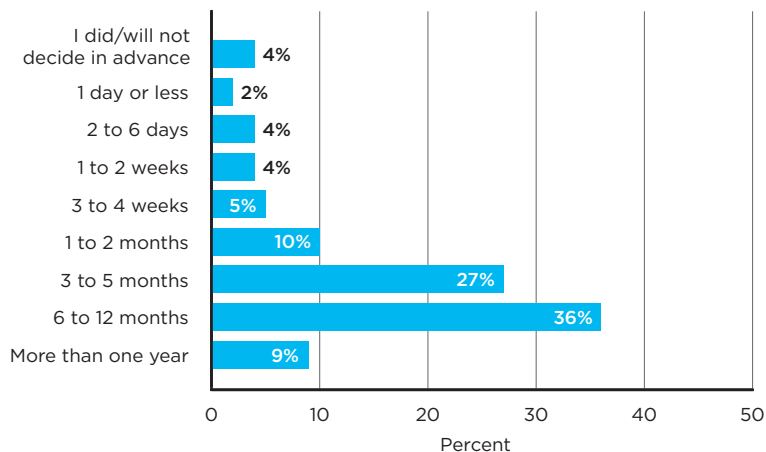
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Australia intercontinental travelers 2018 (N=1058). Note: Totals may not add up to 100% due to rounding.



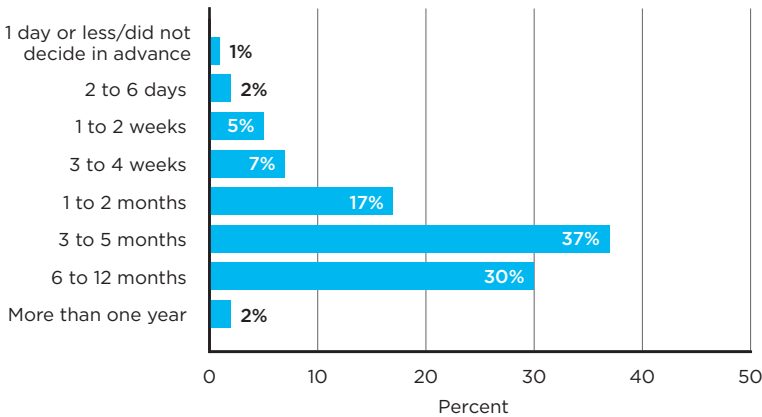
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Australia intercontinental travelers 2018 (N=1058). 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: Australia intercontinental travelers 2018 (N=1058). 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: Australia intercontinental travelers (N=1058). Note: Totals may not add up to 100% due to rounding.



27%

I would bring it up to recommend as a destination



32%

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



29%

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



7%

I would tell people negative things if it were brought up



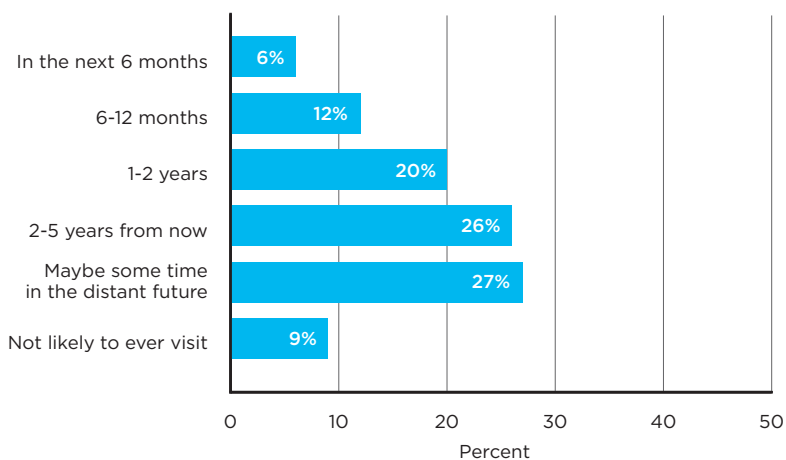
5%

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: *Australia intercontinental travelers 2018 (N=1058).*



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...

900+
partners
(with a 94%
retention rate)



6.6 million
incremental visitors



\$21.8 billion
incremental spending



\$6.2 billion
federal, state &
local taxes



\$47.7 billion
total economic
impact



nearly
52,000
incremental jobs
supported each year



-
- 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
- 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, 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



Visit USA Committees, Australia & New Zealand

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 Australia

Lucy Rowe
President

Caroline Davidson
Vice President

Admin@VisitUSA.org.au

Visit USA Committee New Zealand

Claire Reynolds
Chair

Leanne Cheesman
Vice Chair

Contact@VisitUSA.co.nz

Photos: King George River, Kimberley, Australia (left); Auckland, New Zealand (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

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

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.

Australia

Monique Roos

Senior Commercial Specialist
Monique.Roos@Trade.gov

New Zealand

Janet Coulthart

Commercial Specialist, Head of Section
Janet.Coulthart@Trade.gov

TheBrandUSA.com

6.3.19