



USA

VisitTheUSA.br

Brand USA

Market Information

BRAZIL

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 Brazil 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 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: Iguazu Falls (left); Rio de Janeiro (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.

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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 Brazil's outbound-travel sector.

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

Besides ranking in the top 10 source markets for travel to the United States, Brazil presents significant upward potential. Although recent years have seen economic challenges throughout Latin America, Brazil remains the eighth largest source market for arrivals in the USA. In 2017, nearly 1.9 million Brazilian travelers came to the USA in and spent \$11.5 billion.

With the country's economy back on track, consumer confidence has improved. Buoyed by a stronger Brazilian currency, Brazilians are looking to resume traveling abroad, especially to the United States. In fact, the first five months of 2018 registered a significant 30 percent increase in the number of Brazilian visitors, compared to the same period the previous year.

We also are encouraged by predictions that by 2020, 1.84 million Brazilian tourists are expected to travel to the USA, with a projected increase of 16 percent in six years.

The USA continues to be a highly desirable destination for Brazilians. In a 2017 survey of Brazilian intercontinental travelers, 59 percent of respondents would recommend the USA as a travel destination without any prompting. A total of 21 percent said they would say positive things about U.S. travel.

Overall, Brand USA remains committed to 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 is providing Brazilian travelers the unique opportunity to see the United States even before they travel to our great nation, which in turn, further encourages 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.
- Giant-screen films: Premiering in Brazil, Brand USA's new 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. Our first giant-screen production, *National Parks Adventure*, also is available to viewers through video-on-demand streaming services.
- Our newest campaign, *United Stories*, is 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 that are just one road trip away across the USA.
- Brand USA hosted our first-ever pavilion in 2018 at the Festuris Gramado International Tourism Fair in Brazil, the second largest travel and tourism event in Latin America. The event attracted over 15,000 travel professionals and 450 media representatives and nearly 1,000 exhibitors, generating nearly \$78 million in business deals during the event.

I encourage you to talk to our team about destinations in the USA, the opportunities we offer to enhance your marketing efforts in Brazil, and the best ways to inspire Brazilian travelers to book their USA trips 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



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Market Facts

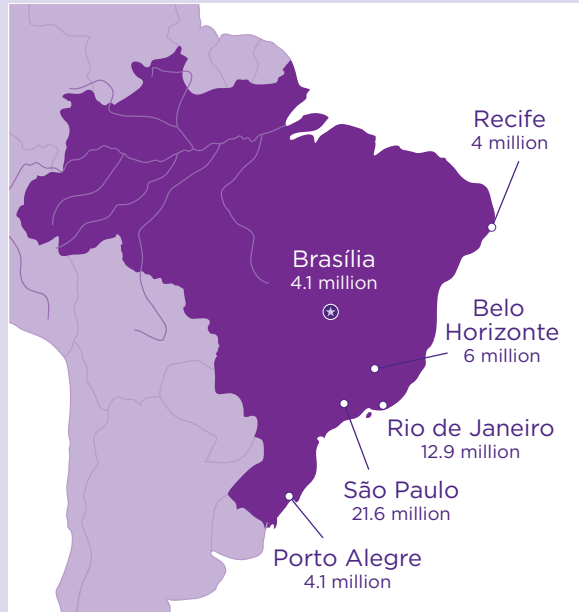


Geography

Area

8,515,770 km²

Largest Metropolitan Areas



Photos: Porto de Galinhas, Pernambuco (left); Estaiada Bridge, São Paulo (right)

Source: CIA World Factbook 2018

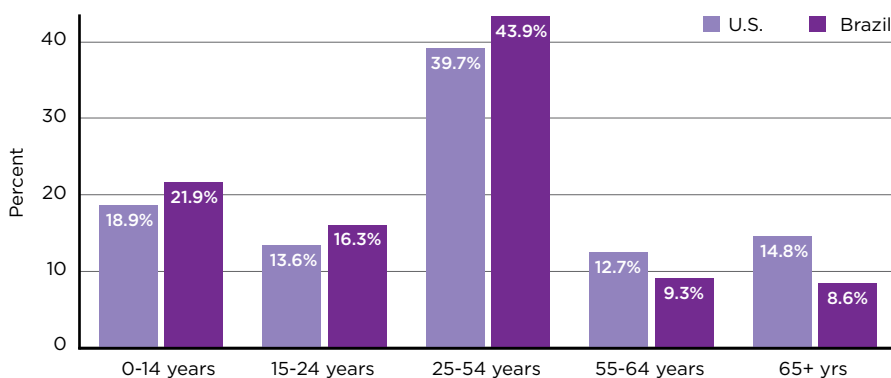


Demographics

Population

	Brazil	USA
Population Size	208,846,892	329,256,465
Median Age	32.4 years	38.2 years
Population Growth Rate (2015 Est.)	0.71%	0.8%

Population by Age



Economy

- **GDP:** \$3,248 trillion
- **GDP Real Growth Rate:** 1%
- **GDP—Per Capita:** \$15,600
- **Unemployment Rate:** 312.8%
- **Inflation Rate:** 3.4%

Source: CIA World Factbook 2018

Vacation Allocation and National Public Holidays

Salaried Brazilians earn an average of 30 days of paid vacation yearly. Most workers also receive a 13th month salary and a vacation bonus at the end of the year.

Brazil has eight national holidays, three religious holidays (Carnival, Easter, and Corpus Christi), and one or two annual state and city holidays.

National Holidays

- **New Year's Day:** January 1
- **Good Friday:** April 19
- **Tiradentes:** April 21
- **Labor Day:** May 1
- **Corpus Christi:** June 20
- **Independence Day:** September 7
- **Brazilian Patron Saint Day (Nossa Senhora Aparecida):** October 12
- **All Soul's Day:** November 2
- **Proclamation of the Republic:** November 15
- **Christmas:** December 25

Primary Travel Periods

- **Winter Holidays:** (four weeks of school vacation), July
- **Summer Holidays:** (six weeks of school vacation), December–February
- **Christmas Holidays:** (two weeks), December–January

Travel Trends

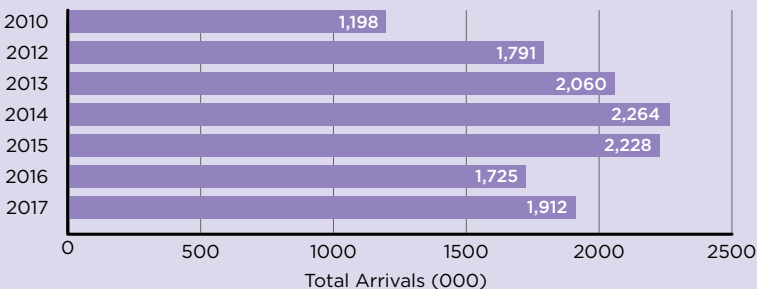


International Travel Trends

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

	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	\$7,603	\$11,343	\$12,600	\$14,122	\$14,073	\$11,206	\$11,475
Travel Receipts	\$5,846	\$8,531	\$9,672	\$10,642	\$10,541	\$7,726	\$7,673
Passenger Fare Receipts	\$1,757	\$2,812	\$2,928	\$3,480	\$3,532	\$3,480	\$3,802
Change (%) in Total Exports	45	14	11	12	0	-20	2

Visitation Trends: Arrivals

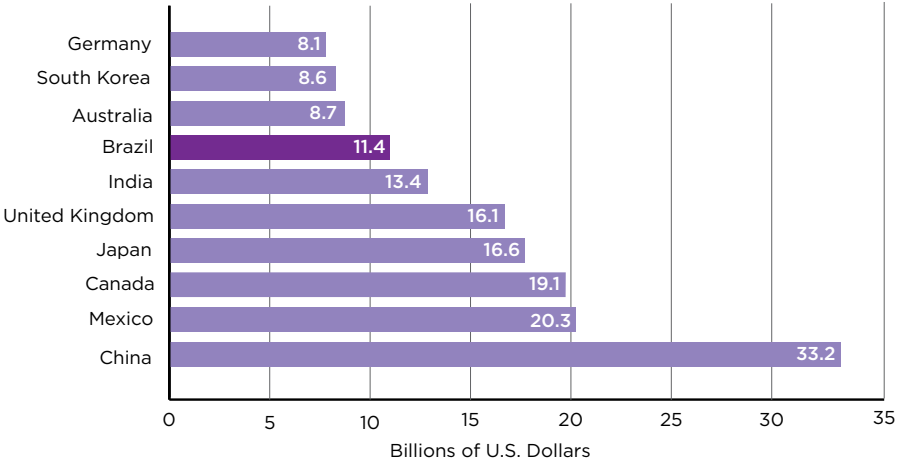


Photos: Amazon rainforest (left); Juscelino Kubitschek Bridge, Brasilia (right)

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

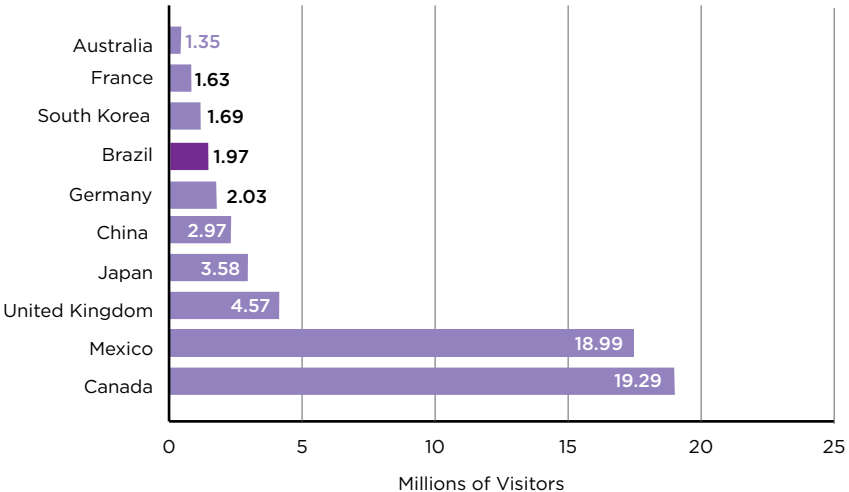
Inbound Travel Trends

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	70.2	73.9
Business	8.1	6.2
Visit Friends/Relatives	12.2	9.8
Convention/Conference/Trade Show	5.6	4.5
Education	3.5	4.3
Health Treatment	0.3	0.6
Religion/Pilgrimages	0.1	0.1

All Purposes of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	76.4	80.2
Visit Friends/Relatives	23.2	21.8
Business	10.9	9.7
Convention/Conference/Trade Show	7.8	6.9
Education	5.9	6.9
Religion/Pilgrimages	0.3	0.6
Health Treatment	0.3	0.8
Other	0.3	0.9
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	85.3	88.3
Business & Convention	16.7	14.7

Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean Nights)	16.7	15.3
Length of Stay in USA (Median Nights)	10	10
First International Trip to the USA	17%	18.6%

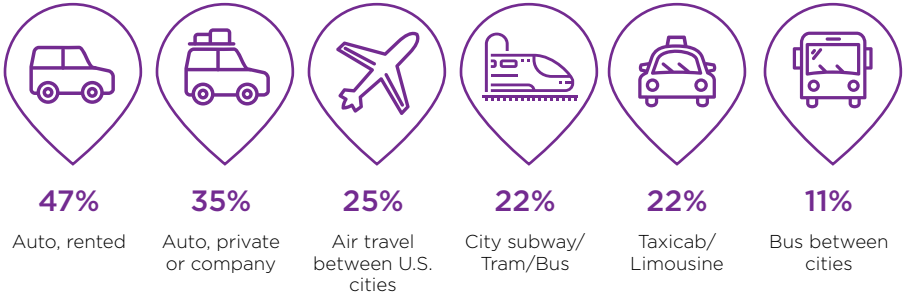
U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/ Regions	2016 (%)	2017 (%)
REGIONS		
Middle Atlantic	24.43	24.66
Mountain	6.71	4.54
Pacific	10.36	11.57
New England	4.43	n/a
South Atlantic	60.14	62.25
East North Central	5.19	5.58
STATES/TERRITORIES		
New York	22.86	23.34
Nevada	4.94	n/a
California	9.76	10.76
Florida	55.82	57.45
CITIES		
New York City	22.64	22.85
Las Vegas	4.92	n/a
Los Angeles	5.68	n/a
Ft. Lauderdale	5.61	n/a
Miami	29.33	25.93
Orlando	35.33	40.96

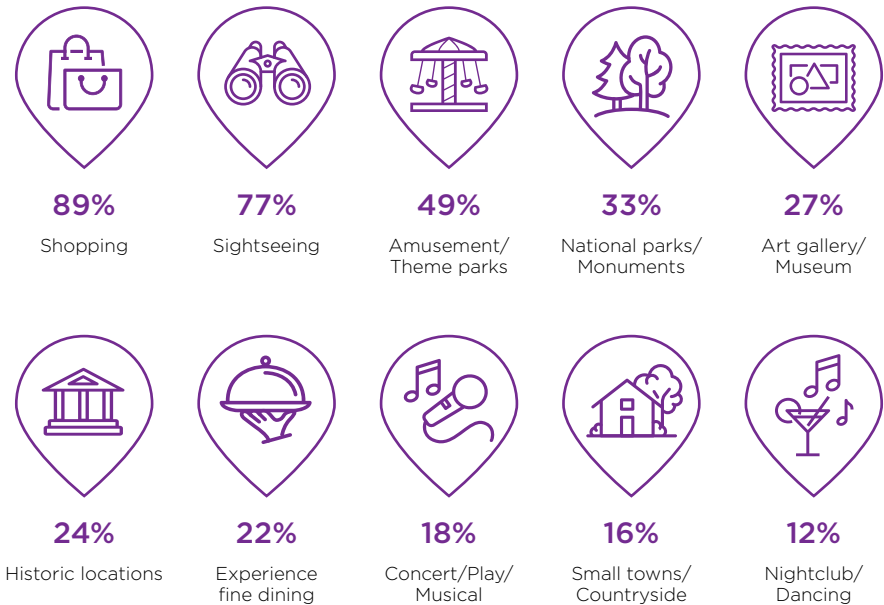
Source: U.S. Department of Commerce, National Travel and Tourism Office



Transportation Used in the USA



Activity Participation While in the USA



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

Air Travel Information



Non-Stop Flights from Brazil to the USA

Flights From	Flights To	Marketing Airline	Flights Per Week
Belém	Fort Lauderdale (4)	Azul Airlines	4
Belo Horizonte	Miami (7)	Latam	7
Brasília	Miami (14) Orlando (7)	Gol Airlines, American Airlines	21
Campinas	Fort Lauderdale (7) Orlando (7)	Azul	14
Fortaleza	Miami (7)	Gol Airlines	7
Manaus	Miami	American Airlines, Latam	14
Recife	Orlando (3)	Azul	3
Rio de Janeiro	Houston (7) Miami (18) New York (5) Orlando (10)	American Airlines, Delta, Latam, United Airlines	33
São Paulo	Atlanta (7) Chicago (7) Dallas (7) Detroit (3) Houston (7) Las Vegas (3) Los Angeles (4) Miami (40) New York (35) Orlando (20) Washington, DC (7)	American Airlines, Avianca Brasil, Delta, Latam, United Airlines	140

Photos: Mount Corcovado, Rio de Janeiro (left); Bom Jesus St., Recife (right)
Source: National Civil Aviation Agency - ANAC & Mercado e Eventos



Flights from Copa Airlines through Panamá:

17 flights per day from Brazil to Panamá departing from:

- São Paulo
- Rio de Janeiro
- Brasília
- Belo Horizonte
- Porto Alegre
- Recife
- Manaus

Connecting to 13 destinations in the USA:

- Fort Lauderdale
- Tampa, Miami
- New Orleans
- Chicago
- Denver
- New York
- Boston
- Washington, DC
- San Francisco
- Orlando
- Los Angeles
- Las Vegas.

Market Snapshot



The last three years have been marked by economic challenges across Latin America and a decrease in the outbound travel from Brazil to the United States. In 2017, however, there were 1.9 million visitors from Brazil to the USA, 11 percent more than in 2016, making it the second best growth rate of visitors among the international markets.

In addition, the first five months of 2018 registered a 30 percent increase in the number of Brazilian visitors, compared to the same period the previous year.

After two years of recession, the Brazilian economy is back on track.

Several nonstop flights from Brazil to the United States were cancelled in 2016, but the airlines decided to return with most of those flights in 2017 and 2018 as well as increasing the frequency of flights, reaching a total of more than 240 weekly nonstop flights.

After two years of recession, the Brazilian economy is back on track. The GDP in 2017 had a real growth rate of one percent—a positive rate that was not registered since 2015. The inflation rate also registered a welcomed decrease from 8.7 percent in 2016 to 3.4 percent in 2017.

During the elections in October and November of 2018, the stock market and exchange rates suffered a period of fluctuation and instability, but signs improved with the decrease in the dollar rate (in comparison to Brazilian reals) and a historic peak record of Sao Paulo's stock market, BOVESPA, in the first week of 2019.



Consumer confidence in the economy has improved with the return of political stability, and the country is poised to return to growth following the deepest recession in many years.

A stronger Brazilian currency has encouraged tourists to travel abroad, especially to the United States, and expenses abroad are returning to the upward trajectory characteristic of the last decade. By 2020, 1.84 million Brazilian tourists are expected to travel to the USA, with a projected increase of 16 percent in six years.

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: Fernando de Noronha (left); Santa Marta Favela, Rio de Janeiro (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	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	 @VisitTheUSAes  @VisitTheUSA	<p>Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn</p> <p>Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA</p> <p>Youku (YouTube equivalent): http://youku.com/gousacn</p> <p>Weishi (like Vine): http://www.weishi.com/u/23484775</p> <p>Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局</p> <p>Lofter (Photo sharing platform): http://GoUSA.lofter.com</p>	#VisitTheUSA
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSACO  YouTube.com/VisitTheUSAes	#VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	 @VisitTheUSAFr  @VisitTheUSA	 facebook.com/VisitTheUSAFr  YouTube.com/VisitTheUSAFr	#VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSADE  YouTube.com/VisitTheUSADE	#VisitTheUSA
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=1036).

Base: Brazil intercontinental travelers.



65%

Cultural/
Historical
attractions



53%

Shopping



53%

Dining/
Gastronomy



52%

Local lifestyle



51%

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=1036). Base: Brazil intercontinental travelers.

43%

Diverse

38%

Down-to-earth

37%

Sophisticated

30%

Creative

30%

Energetic

Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Brazil intercontinental travelers (N=1036).



63%

Websites via computer



48%

Personal recommendations from family and friends



46%

Websites/applications via mobile phone



41%

Websites/applications via tablet

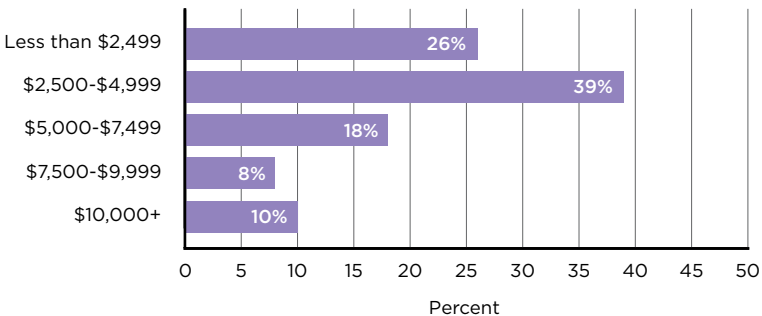


27%

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: Brazil intercontinental travelers (N=1036). (Conversion BRL to USD=0.306).

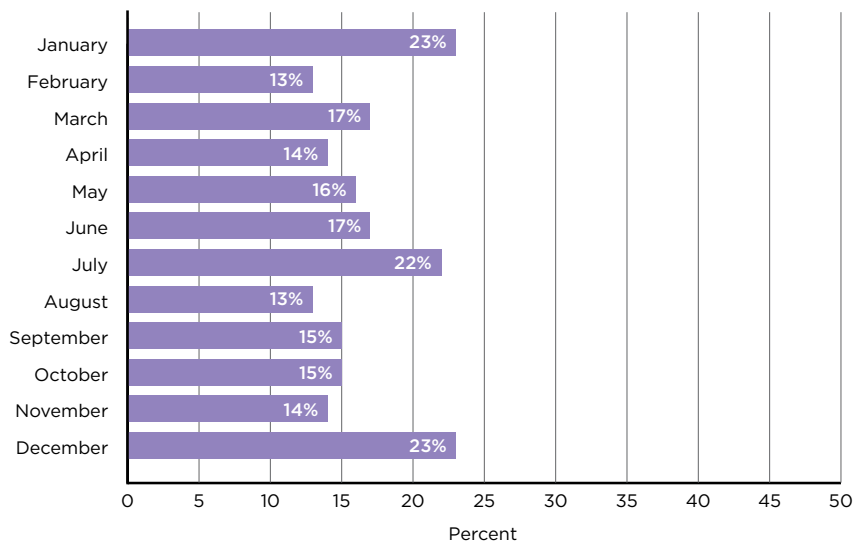


Mean: \$5,271 **Median:** \$4,180



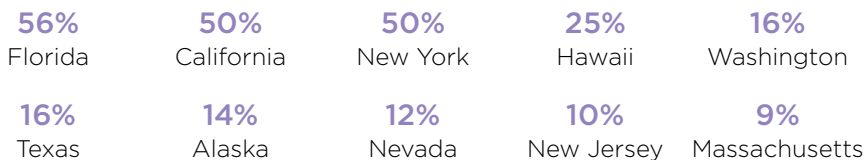
Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: Brazil intercontinental travelers 2018 (N=1036).



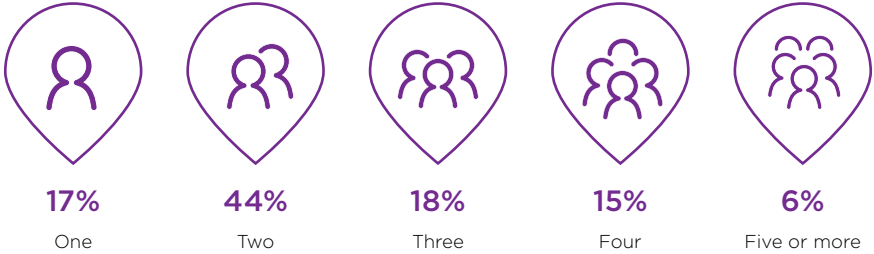
Destination Interest—Top 10 States

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: Brazil intercontinental travelers with interest in visiting the United States (N=1009).



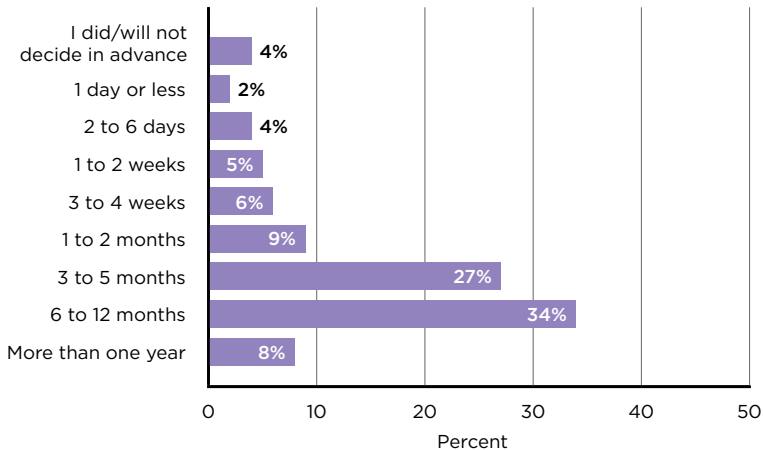
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Brazil intercontinental travelers 2018 (N=1036). Note: Totals may not add up to 100% due to rounding.



Destination Decision for Next International Trip

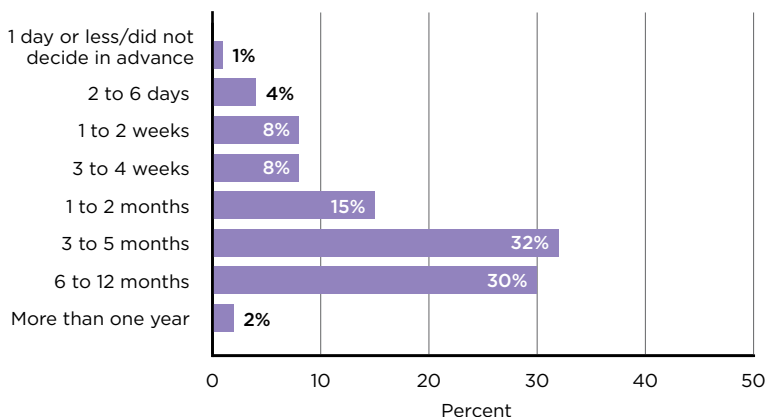
Question: How far in advance of your departure date did/will you decide on the destination? Base: Brazil intercontinental travelers 2018 (N=1036). Note: Totals may not add up to 100% due to rounding.





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: Brazil intercontinental travelers 2018 (N=1036). 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: Brazil intercontinental travelers (N=1036). Note: Totals may not add up to 100% due to rounding.



61%

I would bring it up to recommend as a destination



21%

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



12%

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



4%

I would tell people negative things if it were brought up

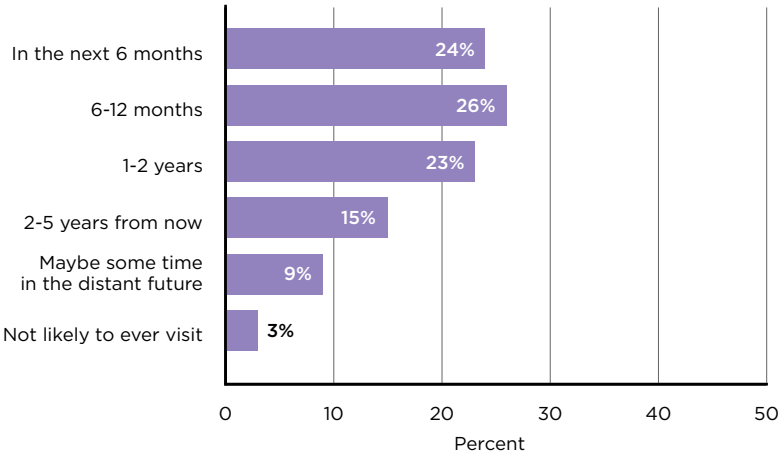


3%

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: *Brazil intercontinental travelers 2018 (N=1036).*





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



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;

*Photos: Barra de Guaratiba (left); Paraty (right)
Source: CIA World Factbook 2018, unless noted otherwise*

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- 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:

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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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