



VisitTheUSA.ca

Brand USA

Market Information

CANADA

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 Canada 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: Basin Head, Prince Edward Island (left); Cathedral Church of St. James, Toronto (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 the outbound-travel sector of our northern neighbor, Canada.

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

Canada remains the number one-ranked country in international arrivals in the United States. In 2017, nearly 20.2 million Canadians visited the USA and spent \$21.4 billion while traveling within the country, ranking third in overall spend.

In addition to ranking as the top source market for travel to the United States, Canada presents significant opportunities for increasing the number of travelers to the USA.

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 is providing Canadian 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 to Google Chromecast in 2019. The



channel offers an assortment of travel experiences across four different categories: the great outdoors, road trips, food and drink, and culture and events. GoUSA TV is increasing programming to include additional themes and formats, including series, films, videos and live videos. This is especially important in Canada because North America has the most developed video-on-demand (VOD) market in the world. There are expected to be nearly 110 million VOD subscribers in North America by 2021.

- Giant-screen films: Premiering in Canada, 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*, 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 Canada, and the best ways to inspire Canadian 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. This is likely to have significant impact in markets like Canada, in which major travel agencies and tour operators are the primary generators of travel itineraries.

Together, we are marketing the USA!

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Brand USA

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Market Facts



Geography

Area

9,984,670 km²

Climate

Varies from temperate in the south to subarctic and arctic in the north.

Largest Metropolitan Areas



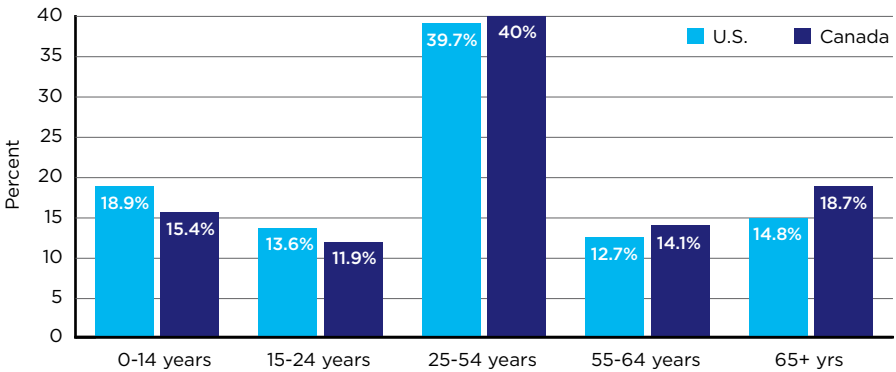
Photos: Edmonton (left); Botanical Gardens, Montréal (right)
Source: CIA World Factbook 2018

Demographics

Population

	Canada	USA
Population Size	35,623,680	329,256,465
Median Age	42 years	38.2 years
Population Growth Rate (2018 Est.)	0.73%	0.8%

Population by Age



Economy

- **GDP:** \$1.764 trillion
- **GDP Real Growth Rate:** 3%
- **GDP—Per Capita:** \$48,100
- **Unemployment Rate:** 6.5%
- **Inflation Rate:** 1.6%

Source: CIA World Factbook 2018



Vacation Allocation

Canada has six national holidays, three religious holidays, and various provincial and city holidays each year.

National Public Holidays 2019

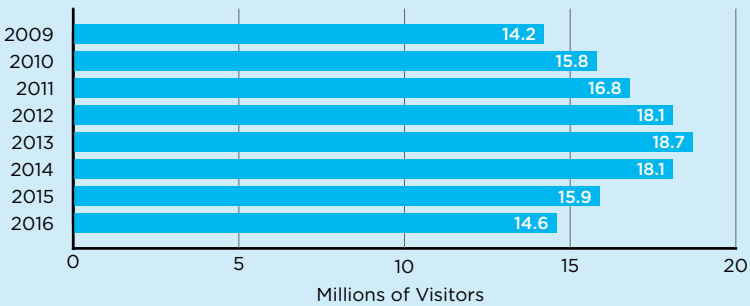
- **New Year's Day:** Tuesday, January 1
- **Canada Day:** Monday, July 1
- **Labor Day:** Monday, September 2
- **Christmas Day:** Wednesday, December 25

Travel Trends



International Travel Trends

Visitation Trends: Arrivals

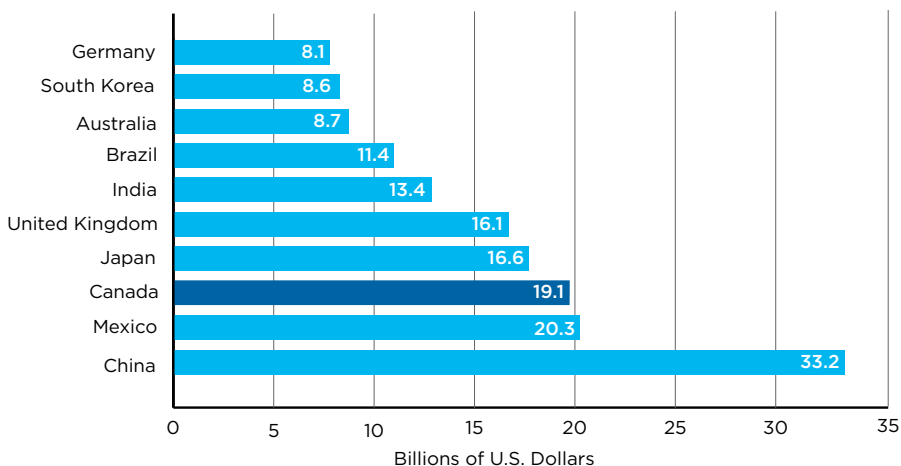


Photos: *Petit Cahmplain St., Quebec City (left), Gastown, Vancouver (right)*
Source: U.S. Department of Commerce, National Travel and Tourism Office



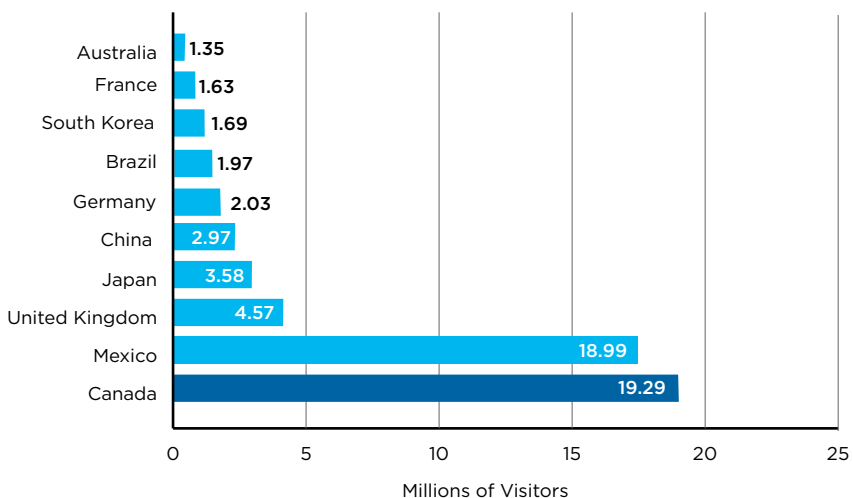
Inbound Travel Trends

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

Air Travel Information



Non-Stop Flights from Canada to the USA

Flights To	Flights From	Marketing Airline
Anchorage	Vancouver YVR	Air Canada
Atlanta	Toronto YYZ	Air Canada
Atlanta	Toronto YYZ	Delta Airlines
Austin	Toronto YYZ	Air Canada
Baltimore	Montreal YUL	Air Canada
Baltimore	Toronto YYZ	Air Canada
Boston	Montreal YUL	Air Canada
Boston	Toronto YTZ	Porter Airlines
Boston	Toronto YYZ	Air Canada
Boston	Toronto YYZ	WestJet Airlines
Burlington	Toronto YTZ	Porter Airlines
Charlotte	Toronto YYZ	Air Canada
Charlotte	Toronto YYZ	American Airlines
Chicago MDW	Toronto YTZ	Porter Airlines
Chicago ORD	Calgary YYC	WestJet Airlines
Chicago ORD	Montreal YUL	Air Canada
Chicago ORD	Toronto YYZ	Air Canada
Chicago ORD	Toronto YYZ	American Airlines
Chicago ORD	Toronto YYZ	United Airlines
Chicago ORD	Vancouver YVR	Air Canada
Cincinnati	Toronto YYZ	Air Canada
Cincinnati	Toronto YYZ	Delta Airlines

Photos: National Gallery, Ottawa (left); Lake Garibaldi, Whistler British Columbia (right)

Source: Brand USA Proprietary Research



Flights To	Flights From	Marketing Airline
Cleveland	Toronto YYZ	Air Canada
Columbus	Toronto YYZ	Air Canada
Dallas/Ft. Worth	Calgary YYC	WestJet Airlines
Dallas/Ft. Worth	Montreal YUL	Air Canada
Dallas/Ft. Worth	Toronto YYZ	Air Canada
Dallas/Ft. Worth	Toronto YYZ	American Airlines
Dallas/Ft. Worth	Vancouver YVR	Air Canada
Denver	Calgary YYC	WestJet Airlines
Denver	Montreal YUL	Air Canada
Denver	Toronto YYZ	Air Canada
Denver	Toronto YYZ	United Airlines
Denver	Vancouver YVR	Air Canada
Detroit	Toronto YYZ	Air Canada
Detroit	Toronto YYZ	Delta Airlines
Fort Lauderdale	Calgary YYC	WestJet Airlines
Fort Lauderdale	Montreal YUL	Air Canada
Fort Lauderdale	Toronto YYZ	Air Canada
Fort Lauderdale	Toronto YYZ	WestJet Airlines
Fort Myers	Montreal YUL	Air Canada
Fort Myers	Toronto YYZ	Air Canada
Fort Myers	Toronto YYZ	WestJet Airlines
Harrisburg	Toronto YYZ	Air Canada
Hartford	Montreal YUL	Air Canada
Hartford	Toronto YYZ	Air Canada
Honolulu	Calgary YYC	WestJet Airlines
Honolulu	Toronto YYZ	Air Canada
Honolulu	Vancouver YVR	Air Canada
Houston	Calgary YYC	WestJet Airlines
Houston	Montreal YUL	Air Canada
Houston	Toronto YYZ	Air Canada
Houston	Toronto YYZ	United Airlines
Indianapolis	Toronto YYZ	Air Canada

Flights To	Flights From	Marketing Airline
Jacksonville	Toronto YYZ	Air Canada
Kahului	Calgary YYC	WestJet Airlines
Kahului	Vancouver YVR	Air Canada
Kansas City	Toronto YYZ	Air Canada
Kona	Vancouver YVR	Air Canada
Las Vegas	Calgary YYC	WestJet Airlines
Las Vegas	Montreal YUL	Air Canada
Las Vegas	Toronto YYZ	Air Canada
Las Vegas	Toronto YYZ	WestJet Airlines
Las Vegas	Vancouver YVR	Air Canada
Los Angeles	Calgary YYC	WestJet Airlines
Los Angeles	Montreal YUL	Air Canada
Los Angeles	Toronto YYZ	Air Canada
Los Angeles	Toronto YYZ	American Airlines
Los Angeles	Toronto YYZ	WestJet Airlines
Los Angeles	Vancouver YVR	Air Canada
Memphis	Toronto YYZ	Air Canada
Miami	Montreal YUL	Air Canada
Miami	Toronto YYZ	Air Canada
Miami	Toronto YYZ	American Airlines
Miami	Toronto YYZ	WestJet Airlines
Milwaukee	Toronto YYZ	Air Canada
Minneapolis	Calgary YYC	WestJet Airlines
Minneapolis	Toronto YYZ	Air Canada
Minneapolis	Toronto YYZ	Delta Airlines
Myrtle Beach	Toronto YTZ	Porter Airlines
Nashville	Calgary YYC	WestJet Airlines
Nashville	Toronto YYZ	Air Canada
Nashville	Toronto YYZ	WestJet Airlines
New Orleans	Toronto YYZ	Air Canada
New York JFK	Calgary YYC	WestJet Airlines
New York JFK	Toronto YYZ	American Airlines



Flights To	Flights From	Marketing Airline
New York JFK	Toronto YYZ	Delta Airlines
New York LGA	Montreal YUL	Air Canada
New York LGA	Toronto YYZ	Air Canada
New York LGA	Toronto YYZ	American Airlines
New York LGA	Toronto YYZ	WestJet Airlines
Newark	Montreal YUL	Air Canada
Newark	Toronto YTZ	Porter Airlines
Newark	Toronto YYZ	Air Canada
Newark	Toronto YYZ	United Airlines
Newark	Vancouver YVR	Air Canada
Orlando	Calgary YYC	WestJet Airlines
Orlando	Montreal YUL	Air Canada
Orlando	Toronto YYZ	Air Canada
Orlando	Toronto YYZ	WestJet Airlines
Orlando-Melbourne	Toronto YTZ	Porter Airlines
Palm Springs	Calgary YYC	WestJet Airlines
Palm Springs	Toronto YYZ	Air Canada
Palm Springs	Toronto YYZ	WestJet Airlines
Palm Springs	Vancouver YVR	Air Canada
Philadelphia	Montreal YUL	Air Canada
Philadelphia	Toronto YYZ	Air Canada
Philadelphia	Toronto YYZ	American Airlines
Phoenix	Calgary YYC	WestJet Airlines
Phoenix	Montreal YUL	Air Canada
Phoenix	Toronto YYZ	Air Canada
Phoenix	Toronto YYZ	WestJet Airlines
Phoenix	Vancouver YVR	Air Canada
Pittsburgh	Montreal YUL	Air Canada
Pittsburgh	Toronto YYZ	Air Canada
Portland, OR	Vancouver YVR	Air Canada
Portland, OR	Vancouver YVR	Alaska Air
Raleigh	Toronto YYZ	Air Canada

Flights To	Flights From	Marketing Airline
Rochester	Toronto YYZ	Air Canada
Sacramento	Vancouver YVR	Air Canada
Salt Lake City	Calgary YYC	WestJet Airlines
Salt Lake City	Toronto YYZ	Delta Airlines
San Antonio	Toronto YYZ	Air Canada
San Diego	Calgary YYC	WestJet Airlines
San Diego	Toronto YYZ	Air Canada
San Francisco	Calgary YYC	WestJet Airlines
San Francisco	Montreal YUL	Air Canada
San Francisco	Toronto YYZ	Air Canada
San Francisco	Vancouver YVR	Air Canada
San Jose	Vancouver YVR	Air Canada
San Juan	Toronto YYZ	Air Canada
San Juan	Toronto YYZ	WestJet Airlines
Sarasota	Toronto YYZ	Air Canada
Seattle	Calgary YYC	WestJet Airlines
Seattle	Toronto YYZ	Air Canada
Seattle	Vancouver YVR	Air Canada
Seattle	Vancouver YVR	Alaska Air
St. Louis	Toronto YYZ	Air Canada
Syracuse	Toronto YYZ	Air Canada
Tampa	Montreal YUL	Air Canada
Tampa	Toronto YYZ	Air Canada
Tampa	Toronto YYZ	WestJet Airlines
Washington IAD	Montreal YUL	Air Canada
Washington IAD	Toronto YTZ	Porter Airlines
Washington IAD	Toronto YYZ	United Airlines
Washington DCA	Montreal YUL	Air Canada
Washington DCA	Toronto YYZ	Air Canada
Washington DCA	Toronto YYZ	American Airlines
West Palm Beach	Montreal YUL	Air Canada
West Palm Beach	Toronto YYZ	Air Canada

Market Snapshot



Although it is modest, Canada is in a period of economic growth. Baby boomers, who represent a significant portion of the population (29%), are gradually retiring. These individuals have a lot of discretionary income and want to travel.

Canada's aging population is a factor in generating more outbound leisure travel. (The propensity for taking leisure trips outside the country increases with age.) In fact, Canadians who are at least 55 are about 40 percent more likely to travel beyond their borders on leisure trips, compared to younger Canadians.

The demand for travel to visit friends and relatives is high among Canadian residents from various ethnic communities who travel to their country of origin.

Sales Distribution

The principal distributors of travel in Canada are retail travel agencies, online travel agencies, and tour operators. The most prominent of these companies (and ones with offices in Canada) belong to the Canadian Association of Tour Operators (CATO). They run outbound tour packages from Canada to international destinations: both across the U.S. border and overseas. Smaller tour operators in Canada can become CATO associate (non-voting) members. And, travel service suppliers, destination marketing organizations, and other interested groups may become supporting members of CATO.

Source: The Canadian Association of Tour Operators (CATO)

Photos: Old Montréal (left), Vancouver (right)

Connectivity

Canadians are familiar with digital marketing and are among the most active populations on social media. Destinations are using effective measures in the field of digital technology to increase their promotional efforts, which should stimulate Canadian outbound travel.

Canadians prefer to stay connected while traveling. Among Canadian travelers who will go beyond their borders this summer, 92 percent plan to stay connected through at least one mobile device: smartphone (67 percent) and/or tablet (44 percent)..

Canadian residents made 20.2 million total overnight trips to the United States in 2017.

Transportation

After accounting for normal seasonal travel patterns, air travel by Canadians to the United States rose in June 2017. Canadian residents took 760,000 overnight trips by plane to the United States in June 2017, a 14.8 percent increase from May 2017 and 16.1 percent more than June 2016. On a year-over-year basis, double-digit increases in the numbers of Canadians traveling to the United States by plane were recorded in British Columbia (+22.3%), Quebec (+18.2%), Ontario (+18.1%), and Alberta (+11.6%).

Canadian residents made 20.2 million total overnight trips to the United States in 2017, an increase of 4.8 percent—the first positive result in four years. Trips by car also increased 1.0 percent in 2017 to 32.2 million, which represents three of every four trips by Canadian residents.

Although there was an increase in 2017, this number was still significantly lower by 30.6 percent of the number of car trips to the United States in 2013.

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: Toronto (left); Edith Cavell Lake, Alberta (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 @VisitTheUSA	facebook.com/VisitTheUSAau YouTube.com/VisitTheUSA #VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	@VisitOsUSA @VisitTheUSA @VisitTheUSA	facebook.com/VisiteOsUSA YouTube.com/VisiteOsUSA #VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	@VisitTheUSACA @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSACA YouTube.com/VisitTheUSA #VisitTheUSA
Canada: French	frVisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSACA @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSAFr YouTube.com/VisitTheUSAFr #VisitTheUSA
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	@VisitTheUSAes @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSACL YouTube.com/VisitTheUSAes #VisitTheUSA
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	@VisitTheUSAes @VisitTheUSA @VisitTheUSA 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	#VisitTheUSA
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	@VisitTheUSAes @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSACO YouTube.com/VisitTheUSAes #VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSAFr @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSAFr YouTube.com/VisitTheUSAFr #VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	@VisitTheUSA @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSADE YouTube.com/VisitTheUSADE #VisitTheUSA
India	GoUSA.in	Plan Your USA Trip Now	@GoUSAin @VisitTheUSA @VisitTheUSA	facebook.com/GoUSAin YouTube.com/GoUSAin #USATrip
Japan	GoUSA.jp	今すぐ USAへの 旅の 計画を	@GoUSAjp @VisitTheUSA @VisitTheUSA	facebook.com/GoUSAjp YouTube.com/GoUSAjp アメリカ旅行
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	@VisitTheUSAes @VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSAMX YouTube.com/VisitTheUSAes #VisitTheUSA
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	@GoUSAkr @VisitTheUSA @VisitTheUSA	facebook.com/GoUSAkr YouTube.com/GoUSAkr #미국여행
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	@VisitTheUSA @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 @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=2049).

Base: Canada intercontinental travelers.



53%

Beaches/Seaside attractions



51%

Cultural/Historical attractions



46%

Local lifestyle



40%

Dining/Gastronomy



31%

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=2049). Base: Canada intercontinental travelers.

36%

Diverse

32%

Arrogant

30%

Adventurous

26%

Friendly

23%

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: Canada intercontinental travelers (N=2049).



61%

Websites via computer



43%

Personal recommendations from family and friends



30%

Websites/Applications via mobile phone



29%

Websites/Applications via tablet

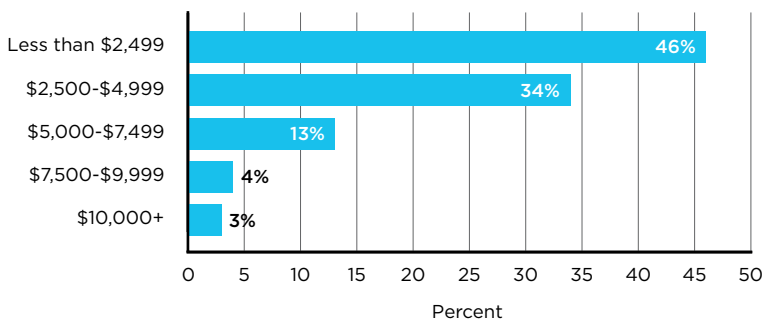


21%

Personal advice from travel professionals/Travel agents

Expected Household Travel Spend for Next Intercontinental Trip

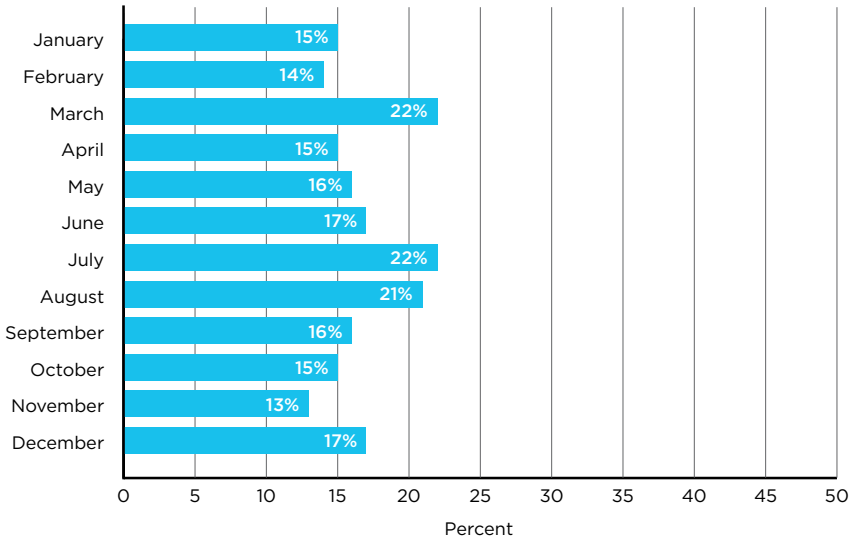
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Canada intercontinental travelers (N=2049). (Conversion CAD to USD=0.77).



Mean: \$3,384 **Median:** \$2,726

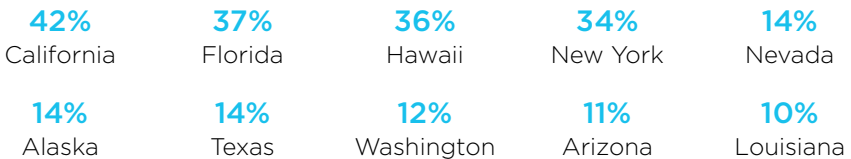
Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: Canada intercontinental travelers 2018 (N=2049).



Destination Interest—Top 10 States

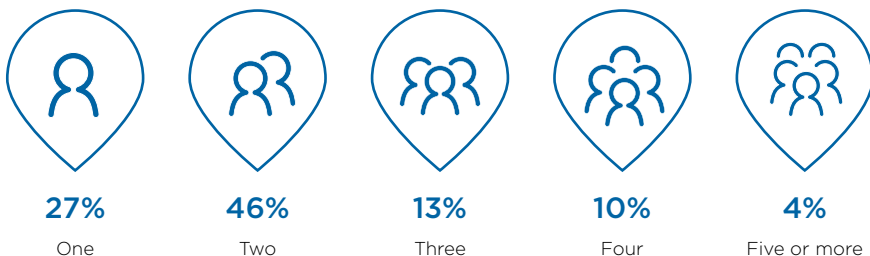
Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: Canada intercontinental travelers with interest in visiting the United States (N=2002).





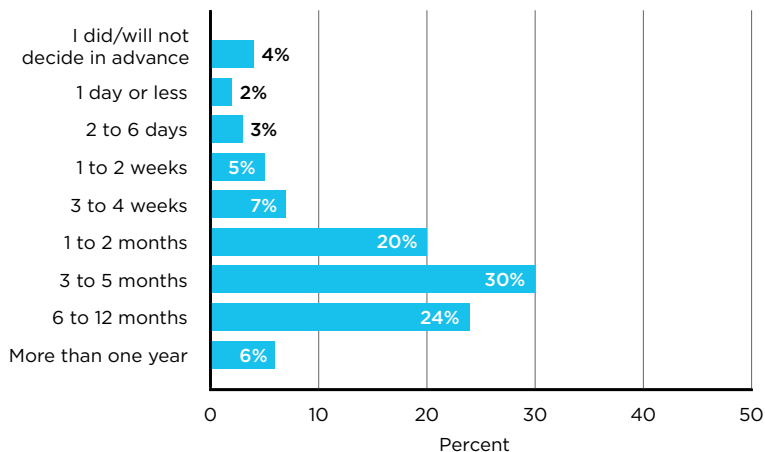
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Canada intercontinental travelers 2018 (N=2049). Note: Totals may not add up to 100% due to rounding.



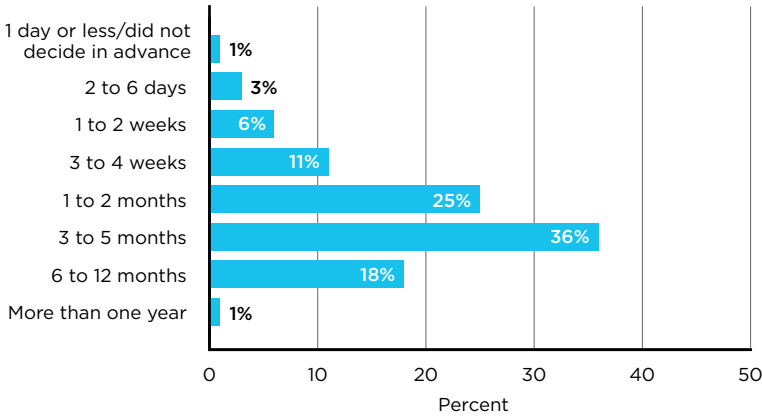
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Canada intercontinental travelers 2018 (N=2049). 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: Canada intercontinental travelers 2018 (N=2049). 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: Canada intercontinental travelers (N=2049). Note: Totals may not add up to 100% due to rounding.



33%

I would bring it up to recommend as a destination



30%

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



25%

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



8%

I would tell people negative things if it were brought up



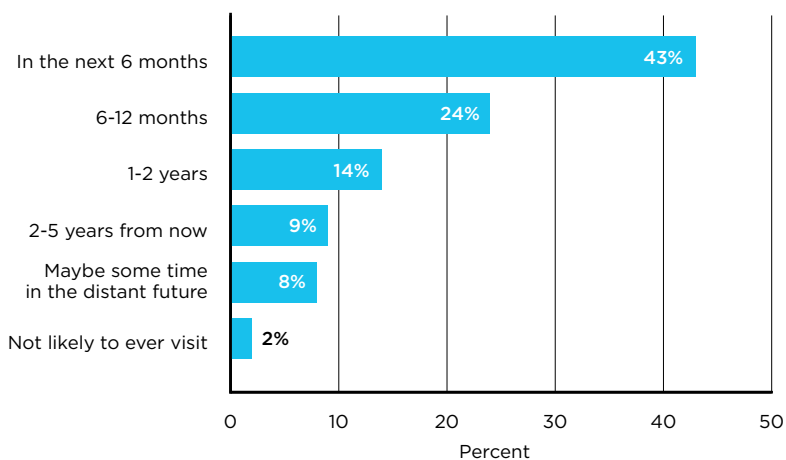
4%

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: Canada intercontinental travelers 2018 (N=2049).



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



HOTEL

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 Committee, Canada

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 Canada

Susan Webb

President

Denise Graham

Vice President

Admin@DiscoverAmericaCanada.org

Photos: Basilique Notre-Dame, Montréal (left); Cedar Dunes, Prince Edward Island (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:

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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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