

The logo consists of the letters 'USA' in a bold, sans-serif font, where each letter is composed of a grid of small dots.

VisitTheUSA.fr

Brand USA

# Market Information

FRANCE

# 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 France 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

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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

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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: Eiffel Tower, Paris (left); Old City, Bordeaux (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](http://TheBrandUSA.com). For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at [VisitTheUSA.com](http://VisitTheUSA.com).

### Brand USA Headquarters

1725 Eye Street NW  
Eighth Floor  
Washington, DC 20006 USA

Phone: +1 202.536.2060  
Email: [info@TheBrandUSA.com](mailto:info@TheBrandUSA.com)

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## A Message from Christopher L. Thompson



The team at Brand USA, the destination-marketing organization for the United States, looks forward to working with you to tap the great potential of the outbound-tourism market in France.

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

Travel is a valued endeavor for the French, who have a minimum of five weeks of paid holidays and 11 national holidays.

The holiday departure rate has been increasing consistently since 2010. Facing economic and security challenges at home, the French look to travel as a way to unwind and relax. In a recent Brand USA survey, more than 70 percent of those surveyed expected to travel to the USA in the next five years. And, more than half of the French travelers who have already traveled to the USA expressed their interest to return.

In 2017, nearly 1.7 million French visited the USA, making France the eighth-largest source market among international arrivals to the United States. And, those visitors spent \$6.1 billion during their visits.

Brand USA launched a comprehensive storytelling strategy to create relevant, engaging, and authentic content, which presents the diversity of travel possibilities across the United States. This approach provides French travelers the unique opportunity to see the unique aspects of the United States and 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 France, 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 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.
- Brand USA also takes part in IFTM Top Resa and the annual International Media Marketplace. Both events take place in Paris.

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

Remember 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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## 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

643,801 km<sup>2</sup>

### Largest Metropolitan Areas



Photos: Vallon des Auffes, Marseille (left); Vineyard in Bordeaux (right)

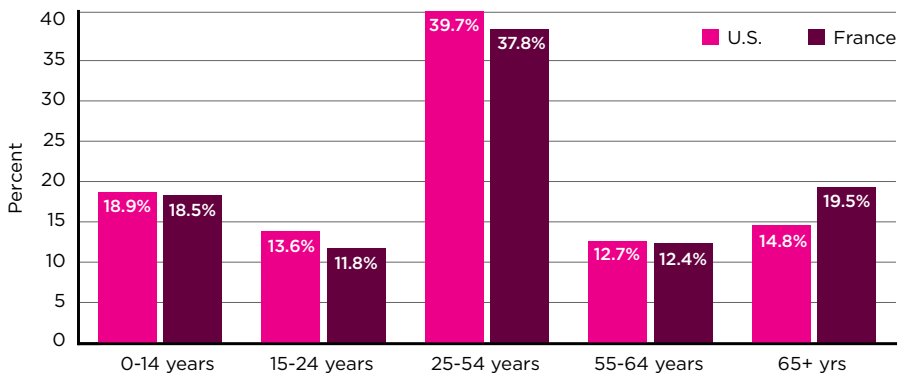
Source: CIA World Factbook 2018

# Demographics

## Population

	France	USA
Population size	67,186,638	323,730,000
Median age	41.4 years	37.8 years
Population growth rate (2015 est.)	0.39%	0.78%

## Population by Age



# Economy

- **GDP:** \$2.291 trillion (2017)
- **GDP real growth rate:** 2.8% (2017)
- **GDP—per capita:** \$44,100 (2017)
- **Unemployment rate:** 8.6% (2017)
- **Inflation rate:** 1% (2017)

Source: CIA World Factbook 2018



## Vacation Allocation

By law, French get a minimum of five weeks of paid holidays. To the existing 12 national holidays, we also may consider the historical “RTT” days that are additional days off for those working 39 hours/week in the public sector and for some private companies.

### National Holidays 2019

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- **New Year’s Day:** January 1
- **Easter Monday:** April 22
- **Labor Day:** May 1
- **Victory Day:** May 8
- **Ascension Day:** May 30
- **Whit Sunday:** June 9
- **Whit Monday:** June 10
- **Bastille Day:** July 14
- **Assumption Day:** August 15
- **All Saints’ Day:** November 1
- **Armistice Day:** November 11
- **Christmas Day:** December 25

Note: With the exception of Easter Monday, these are not sliding dates, meaning a national holiday during a weekend won’t be moved to a weekday.

### Primary Travel Periods

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- **Winter Holidays:** two weeks in February or March
- **Easter Holidays:** two weeks in April
- **Summer Holidays:** six weeks of school holidays in July and August
- **Fall Holidays:** two weeks in late October
- **Christmas Holidays:** two weeks in late December

# Travel Trends

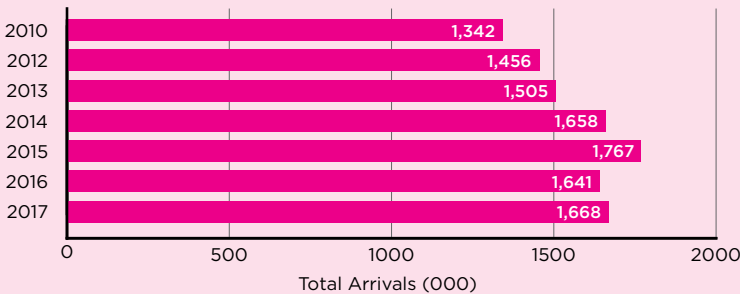


## International Travel Trends

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

	2010	2012	2013	2014	2015	2016	2017
<b>Total Travel &amp; Tourism Exports</b>	\$4,424	\$5,023	\$5,501	\$6,151	\$6,503	\$6,075	\$6,139
<b>Travel Receipts</b>	\$3,488	\$3,790	\$4,219	\$4,723	\$5,119	\$4,816	\$4,880
<b>Passenger Fare Receipts</b>	\$936	\$1,233	\$1,282	\$1,428	\$1,384	\$1,259	\$1,259
<b>Change (%) in Total Exports</b>	8	-8	10	12	6	-7	1

### Visitation Trends: Arrivals

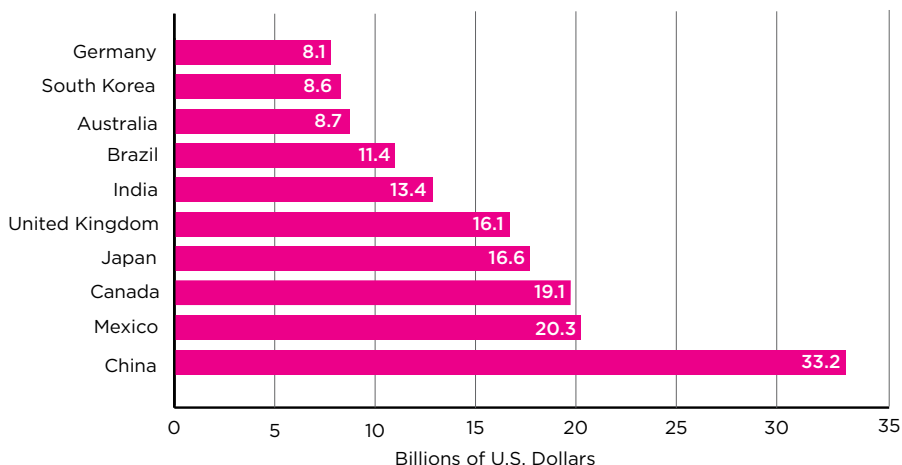


Photos: Mont Saint-Michel, Normandy (left), Place des Jacobins, Lyon (right)  
Source: U.S. Department of Commerce, National Travel and Tourism Office



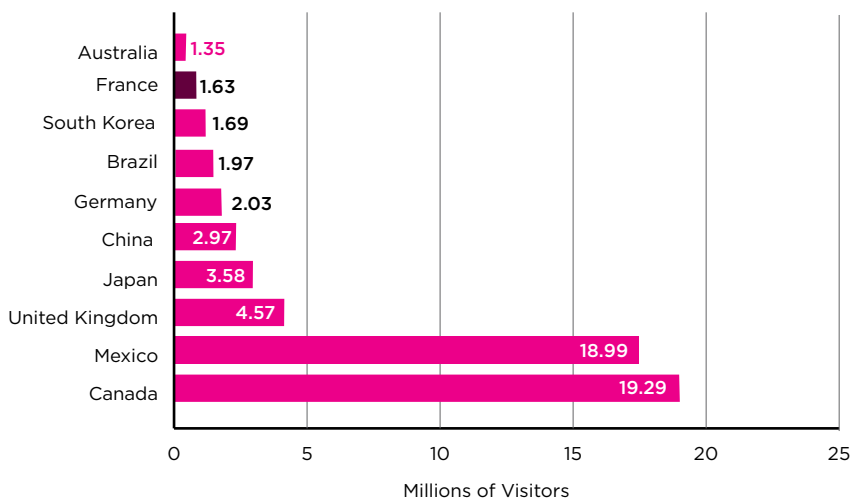
# Inbound Travel Trends

## 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	59	61
Business	11	12
Visit Friends/Relatives	20	17
Convention/Conference/Trade Show	7	6
Education	3	3
Health Treatment	0.1	0.2
Religion/Pilgrimages	0.0	0.1

## All Purposes of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	70	73
Visit Friends/Relatives	29	27
Business	14	14
Convention/Conference/Trade Show	9	8
Education	4	4
Religion/Pilgrimages	0.2	0.6
Health Treatment	0.1	0.3
Other	0.5	0.4
<b>NET PURPOSES OF TRIP</b>		
Leisure & Visit Friends and Relatives	83	82
Business & Convention	21	21

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



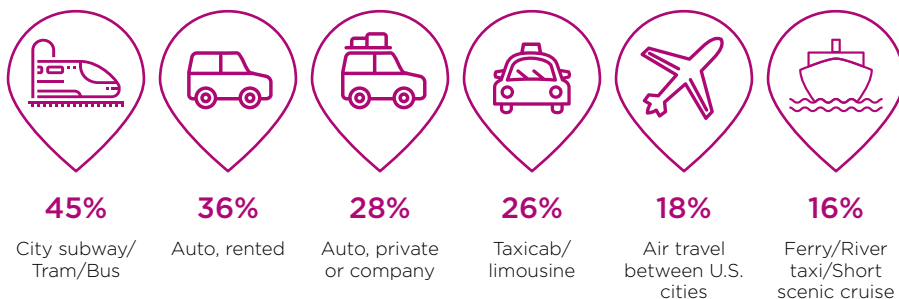
## Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean Nights)	15.9	16.5
Length of Stay in USA (Median Nights)	10	9
First International Trip to the USA	24%	26%

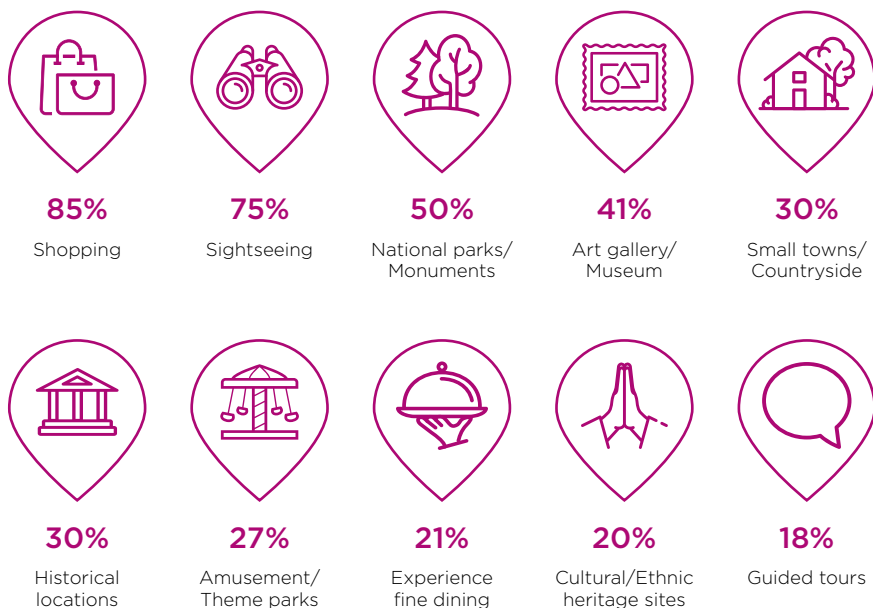
## U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/ Regions	2016 (%)	2017 (%)
<b>REGIONS</b>		
East North Central	5.69	n/a
Middle Atlantic	42.66	42.82
Mountain	17.16	14.64
Pacific	29.53	26.82
New England	6.18	n/a
South Atlantic	24.43	24.81
<b>STATES/TERRITORIES</b>		
New York	40.11	41.22
Arizona	8.77	n/a
Nevada	13.69	n/a
California	28.03	26.00
Florida	15.23	16.64
Washington, DC (Metro Area)	6.55	n/a
<b>CITIES</b>		
New York City	39.78	40.45
Las Vegas	13.61	n/a
Los Angeles	19.19	17.41
San Francisco	15.65	11.90
Miami	11.36	12.45

## 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



Airlift to the USA from France has seen drastic changes in recent years. With newcomers breaking the market with lower price airfares such as Norwegian, U.S. destinations have become more accessible to French travelers, making the way for shorter trips (on the East Coast especially) and easier connections.

The strong alliance between Air France, KLM, and Delta has recently been reinforced with Virgin enabling, French travelers to use London-Heathrow as an additional airline hub to the existing Paris-CDG or even Amsterdam-Schipol.

Airlines are key in a disintermediated market such as France. The Airline Development is impressive: there were more new air routes to the USA inaugurated in France in recent years than to any other country (Indianapolis and Denver in 2018, Air France's direct flight to Dallas in 2019).

## Non-Stop Flights from France to the USA

*Note: Some flights are seasonal.*

Flights To	Flights From	Marketing Airline	Frequency (week)
Atlanta ATL	Paris CDG	Air France	14 (2 daily)
Atlanta ATL	Paris CDG	Delta	14 (2 daily)
Boston BOS	Paris CDG	Air France	7 (daily)
Boston BOS	Paris CDG	Delta	7 (daily)
Boston BOS	Paris CDG	Norwegian	4
Charlotte CLT	Paris CDG	American Airlines	7 (daily) Apr-Oct

*Photos: Carcassonne (left); Calanques National Park, Bouches-du-Rhône (right)*

*Source: Brand USA Proprietary Research*

Flights To	Flights From	Marketing Airline	Frequency (week)
Chicago ORD	Paris CDG	Air France	5
Chicago ORD	Paris CDG	American Airlines	7 (daily)
Chicago ORD	Paris CDG	United	7 (daily)
Cincinnati CVG	Paris CDG	Delta	7 (daily)
Dallas DFW	Paris CDG	Air France	7 (daily)
Dallas DFW	Paris CDG	American Airlines	14 (2 daily)
Denver DEN	Paris CDG	Norwegian	3
Detroit DTW	Paris CDG	Air France	7 (daily)
Detroit DTW	Paris CDG	Delta	14 (2 daily)
Fort Lauderdale FLL	Paris CDG	Norwegian	3
Houston IAH	Paris CDG	Air France	7 (daily)
Indianapolis IND	Paris CDG	Delta	7 (daily)
Los Angeles LAX	Paris CDG	Air Tahiti Nui	4
Los Angeles LAX	Paris CDG	Air France	13
Los Angeles LAX	Paris CDG	Delta	7 (daily)
Miami MIA	Paris CDG	Air France	7 (daily)
Miami MIA	Paris CDG	American Airlines	7 (daily)
Miami MIA	Paris CDG	XL Airways	4 June 24-Sept 6
Miami MIA	Paris ORY	Corsair	4 starting June 10
Minneapolis MSP	Paris CDG	Delta	7 (daily)
New York EWR	Nice NCE	La Compagnie	5
New York EWR	Paris CDG	La Compagnie	7 (daily)
New York EWR	Paris CDG	United	14 (2 daily) May 23-Aug 1 7 (daily) Rest of the year
New York EWR	Paris ORY	Level	4
New York EWR	Paris ORY	Norwegian	7 (daily)
New York JFK	Nice NCE	Delta	7 (daily)
New York JFK	Paris CDG	Air France	28 (4 daily)
New York JFK	Paris CDG	American Airlines	7 (daily)
New York JFK	Paris CDG	Delta	7 (daily)
New York JFK	Paris CDG	Norwegian	7 (daily)



Flights To	Flights From	Marketing Airline	Frequency (week)
New York JFK	Paris CDG	XL Airways	7 (daily)
New York JFK	Paris ORY	Air France	7 (daily)
Philadelphia PHL	Paris CDG	American Airlines	7 (daily)
Raleigh RDU	Paris CDG	Delta	7 (daily)
Salt Lake City SLC	Paris CDG	Delta	7 (daily)
San Francisco SFO	Paris CDG	Air France	7 (daily)
San Francisco SFO	Paris CDG	United	7 (daily) Apr 30-Oct 26
San Francisco SFO	Paris CDG	XL Airways	2 June 27-Sept 8
San Francisco SFO	Paris ORY	French Bee	3
Seattle SEA	Paris CDG	Air France	3
Seattle SEA	Paris CDG	Delta	7 (daily)
Washington IAD	Paris CDG	Air France	7 (daily)
Washington IAD	Paris CDG	United	7 (daily)

# Market Snapshot



## The Importance of Leisure in the French Market

The French have some of the longest time off in Europe—a minimum of five weeks of paid holidays, by law, 11 national holidays, and “RTT” days (additional days off) depending on the industry they are working in.

As such, the holiday departure rate has been increasing consistently since 2010, reaching an average departure rate of 62 percent in 2016, and even 86 percent for households with the highest revenues.

France economic and security context explain such high percentages. In addition, the high level of terrorism in France and the numerous social riots against reforms play a part in the French considering travel abroad. Travel trend experts point out that “traveling is a therapy. French travel to recharge batteries, gather with family, and reassure themselves from anxious daily lives.”

Many criteria will be considered by the travel decisionmaker, but the primary considerations include:

- The destination’s weather
- The level of security and threats
- The cost of the trip (USD/EUR currency) always is a consideration

French people also look for:

- Great outdoors adventures
- Authenticity
- Culture and heritage
- Cuisine

*Photos: Sacré-Cœur Basilica, Montmartre (left), Port of Cassis (right)*



French people look for activities in their holidays to include:

- Sightseeing (77%)
- Eating out (4%)
- Relaxing (3%)
- Entertainment (2%)
- Shopping (2%)
- Sport (9%)

The booking window for U.S. travel for French travelers remains to be an average of five months prior the actual departure.

## A Changing Market

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The French love to travel but the way they do has changed drastically. As such, the French market became an important free independent traveler (FIT) business over the years.

The traditional “linear” distribution, and booking system that involved local direct marketing companies, airlines, and hotels sell to tour operators and wholesalers, who distributed their products through travel agencies and retailers, eventually reaching the customers, no longer prevails. With internet, the power went back to customers. The former straightforward travel booking patterns are now challenged by a more complex system, in which consumers can connect directly online to every supplier.

## Tough Travel Trade Competition with Redefined Profit Margins

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According to Syndicat des Entreprises du Tour Operating (SETO, the association of French tour operators), 90,629 passengers were sent by tour operators to the USA (packages) in 2018, an increase of 16 percent from last year. This is the result of various efforts from tour operators to embrace the FIT trend.

A tough competition forced tour operators to redefine their strategies or the way they were once selling. Vacances Transat and TUI France merged. Marietton Group improved their impact through vertical acquisitions (the group bought up entire networks of travel agencies and redefined their online products so they can reach all potential customers). Travel agency networks

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pre-select the tour operator they will work with and ends partnerships with external companies. Former business-to-business tour operators are opening their own agencies to the public.

In the meantime, online travel websites—which rely less on intermediates and have bigger profit margin—engage travelers through aggressive promotions or discounts and give them the possibilities to select the travel they want. Repeaters are keener on booking with the websites as they expect them to know the destination better. As a result, a new kind of key players emerged: 100 percent of online tour operators now connect consumers to alternative independent receptives, and B2C ticket sellers are now used by travel agents to conceive their own FIT products.

## Customized Trips and Length of Stay

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The traditional distribution system (wholesalers and retail agents), however, still play a major role in many cases—for destinations perceived as too complex to be self-organized or experiencing previous bad customer reviews; for travelers with special interests looking for the expertise of a travel agent (such as honeymooners and divers); and for high-spending travelers (luxury segment, senior segment).

While the trend is to book online for easy trips (flight and hotel), travel agencies are still a major option, especially for destinations that are more complicated for the client to organize. Some trips with specific themes, such as sports, arts, and culture, require the special knowledge and organization skills of travel trade. Luxury and senior travel markets give priority to their travel agent. Travel agencies and tour operators are working hard to create value with thematic or tailor-made itineraries.

**French travelers are looking for “different” and singular experiences. While some of them would like to take a parachute jump once in their lifetime, they would love to do it above the Grand Canyon.**



Meanwhile, France has seen significant development of airlines seeking the U.S. market in recent years. New players in the market, such as Norwegian and Level, are increasing the number of routes to the United States, sometimes taking travelers to off-the-beaten-path destinations. Delta recently launched Paris-Indianapolis, while Air France invested in a Paris-Seattle route in 2018, paving the way for better access to lesser-known cities. Moreover, low-cost companies enable customers to reach the USA any time of the year with cheaper flight tickets, making the destination more accessible. Therefore, the length of stay (average 14 nights) may vary, and shorter stays become more common (a weekend in New York, a short week on the East Coast).

## French Are Repeaters and Look for Experiences that Will Make Them Special (or Like a Local)

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More than half of French travelers to the USA have already been there and have expressed their interest to go back. With more than 1.7 million French visitors to the USA in 2017, France has increased the number of travelers that keep coming back to the destinations they once explored.

While the focus has been on West Coast itineraries for years (such as California, Nevada, Utah, and Arizona) as well as New York, Florida is booming. The South (Louisiana mostly) has seen numbers increasing recently as more and more French aspire to go to regions of the USA they have not visited yet.

French travelers are looking for “different” and singular experiences. While some of them would like to take a parachute jump once in their lifetime, they would love to do it above the Grand Canyon. These extraordinary experiences have doubled tour operators’ production. Travel trade key players are challenging their production to offer the most original experiences a traveler can have. What was once a niche segment of U.S. productions is becoming increasingly tailor-made products or something travelers will look for as FIT, such as crossing the USA on a Harley-Davidson;

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renting a Mustang; flying above Devil's Tower; surfing in Los Angeles; swimming with the dolphins in the Gulf of Mexico; riding a horse at a ranch; sharing local beers with Americans; or skiing in the mountains.

French travelers tend to look for experiences that would also enable them to live like a local, live the "American Dream," or live like a perfect American.

## Soft Power, Contents, and Social Media

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This need for experiences has registered a significant increase thanks to social media. These are stories to share and they will enable travelers to empower themselves as strong individuals. They need to experience something they will remember forever and while a simple road trip through the USA is, and always will be, memorable for French travelers, the USA can offer more in currently unexplored regions.

**The American music industry, Hollywood movie hits or "binge watchers" shows are a major influence for French travelers who frequently enjoy them.**

The American music industry, Hollywood movie hits or "binge watchers" shows are a major influence for French travelers who frequently enjoy them. Content shot in the USA also generates attractiveness. Such shows as "CSI," "NCIS," "Westworld," "House of Cards," "Grey's Anatomy," "Stranger Things," or the late-night shows help to reinforce United States' soft power and give hints about what French travelers are looking for.

It is also interesting that French travelers to the USA are looking for trips through personal recommendations. A shift in the way French travelers prepare for their trips is evident in how eager they are to know personal stories of travelers close to their concerns, expectations, and personalities; and to consider more aspiring Facebook pages, YouTube channels, or any other content filled with storytelling shared by their relatives.

Social media and social travel play key roles in future travel, and social and sustainable travel remains a leading trend. No trip is complete without staying connected and keeping up. Sharing experiences is key to satisfaction





and selection. Travel essentially is about connecting places, people, experiences and memories. Technology brings all that together.

According to eMarketer.fr, 20 percent of travelers now use social media to help them plan and organize their trips. A total of 52 percent of travelers said that social media influenced a change in their travel plans, while 80 percent are more likely to book a trip from a company “liked” by a friend than a conventional Facebook ad. The addition of the internet, smartphones, social media, blogs, and videos has redesigned the whole travel industry and the travel experience itself. Technology leads the travel experience starting from the moment a person has the aspiration to go somewhere. Even further, it helps create the aspiration itself. Thousands of blogs, vlogs, and social media accounts dedicated to travel helped this happen. This is the moment to embrace technology as the medium to inspire travelers to go to specific places in the USA, leading to better feedback and improved visibility.

# Brand USA Resources



## Online Channels

### Digital Marketing/Social Media

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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

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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: Le Panier Quarter, Marseille (left); Avignon (right)*



## Social Media Channels

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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
<b>Australia</b>	VisitTheUSA.com.au	Plan Your USA Trip Now	 @VisitOsUSA  @VisitTheUSA	 facebook.com/VisitTheUSAau  YouTube.com/VisitTheUSA	#VisitTheUSA
<b>Brazil</b>	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	 @VisitOsUSA  @VisitTheUSA	 facebook.com/VisiteOsUSA  YouTube.com/VisiteOsUSA	#VisiteOsUSA
<b>Canada: English</b>	VisitTheUSA.ca	Plan Your USA Trip Now	 @VisitTheUSACA  @VisitTheUSA	 facebook.com/VisitTheUSACA  YouTube.com/VisitTheUSA	#VisitTheUSA
<b>Canada: French</b>	frVisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	 @VisitTheUSACA  @VisitTheUSA	 facebook.com/VisitTheUSACA  YouTube.com/VisitTheUSAfr	#VisitTheUSA
<b>Chile</b>	VisitTheUSA.cl	Planifica tu viaje a USA ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSAcl  YouTube.com/VisitTheUSAes	#VisitTheUSA
<b>China</b>	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	<b>Sina Weibo</b> (Chinese microblogging site/hybrid of Twitter and Facebook): <a href="http://weibo.com/GoUSAcn">http://weibo.com/GoUSAcn</a> <b>Tencent Weibo</b> (Chinese microblogging site): <a href="http://t.qq.com/DiscoverGoUSA">http://t.qq.com/DiscoverGoUSA</a> <b>Youku</b> (YouTube equivalent): <a href="http://youku.com/gousacn">http://youku.com/gousacn</a> <b>Weishi</b> (like Vine): <a href="http://www.weishi.com/u/23484775">http://www.weishi.com/u/23484775</a> <b>Wechat</b> (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局 <b>Lofter</b> (Photo sharing platform): <a href="http://GoUSA.lofter.com">http://GoUSA.lofter.com</a>		#VisitTheUSA
<b>Colombia</b>	VisitTheUSA.co	Planifica tu viaje a USA ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSACO  YouTube.com/VisitTheUSAes	#VisitTheUSA
<b>France</b>	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	 @VisitTheUSAfr  @VisitTheUSA	 facebook.com/VisitTheUSAfr  YouTube.com/VisitTheUSAfr	#VisitTheUSA
<b>Germany</b>	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSAde  YouTube.com/VisitTheUSAde	#VisitTheUSA
<b>India</b>	GoUSA.in	Plan Your USA Trip Now	 @GoUSAin  @VisitTheUSA	 facebook.com/GoUSAin  YouTube.com/GoUSAin	#USATrip
<b>Japan</b>	GoUSA.jp	今すぐ USAへの 旅の 計画を	 @GoUSAjap  @VisitTheUSA	 facebook.com/GoUSAjp  YouTube.com/GoUSAjp	アメリカ旅行
<b>Mexico</b>	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSAmx  YouTube.com/VisitTheUSAes	#VisitTheUSA
<b>Korea</b>	GoUSA.or.kr	지금 USA 여행을 계획해보세요	 @GoUSAkr  @VisitTheUSA	 facebook.com/GoUSAkr  YouTube.com/GoUSAkr	#미국여행
<b>Sweden</b>	VisitTheUSA.se	Plan Your USA Trip Now	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSAse  YouTube.com/VisitTheUSA	#VisitTheUSA
<b>Taiwan</b>	GoUSA.tw	n/a	n/a	 facebook.com/GoUSA.official	n/a
<b>United Kingdom</b>	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=1044).*

*Base: France intercontinental travelers.*



**56%**

Local lifestyle



**54%**

Cultural/  
Historical  
attractions



**40%**

Urban attractions



**40%**

Dining/  
gastronomy



**37%**

Ecotourism/  
nature

### 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=1044). Base: France intercontinental travelers.*

**46%**

Diverse

**30%**

Adventurous

**29%**

Trendy

**29%**

Forward-  
thinking

**27%**

Open-minded

# Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday?  
Select all that apply. Base: France intercontinental travelers (N=1044).



54%

Websites  
via computer



34%

Personal  
recommendations  
from family and  
friends



29%

Websites/  
applications  
via tablet



28%

Information in  
printed travel  
guidebooks

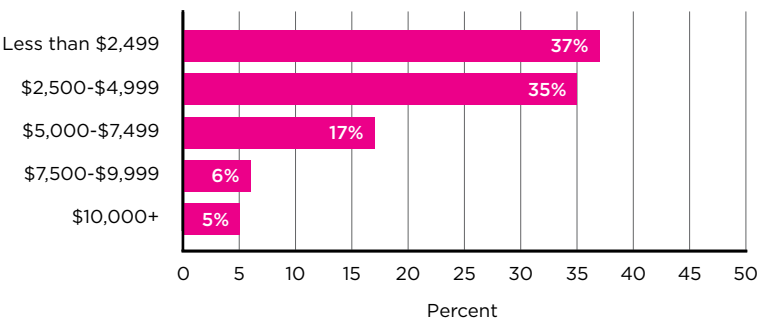


27%

Websites/  
applications  
via mobile phone

# 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: France intercontinental travelers (N=1044). (Conversion EUR to USD=1.129).

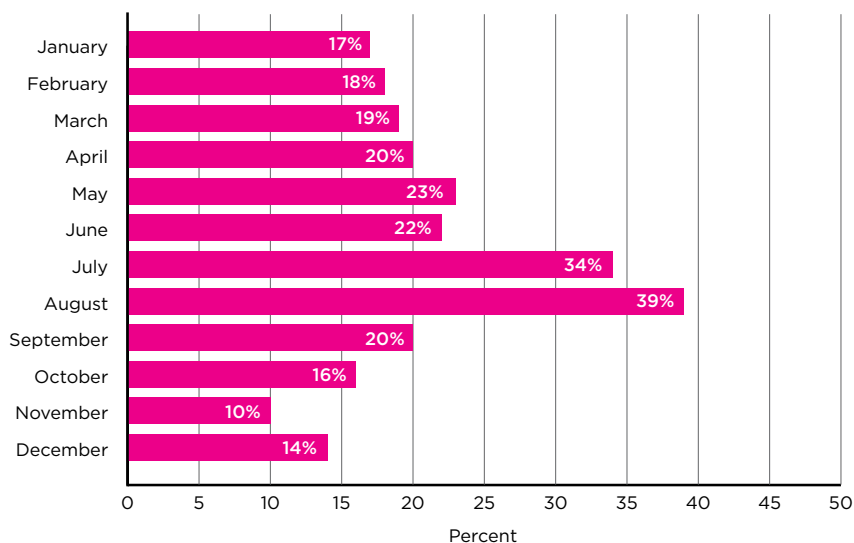


**Mean:** \$4,136 **Median:** \$3,387



## Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: France intercontinental travelers 2018 (N=1044).



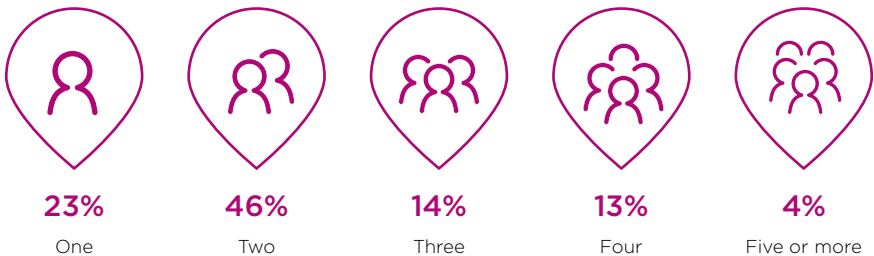
## Destination Interest—Top 10 States

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: France intercontinental travelers with interest in visiting the United States (N=961).

51%	48%	32%	21%	19%
California	New York	Florida	Hawaii	Texas
17%	17%	14%	13%	13%
Louisiana	Washington	Colorado	Alaska	Mississippi

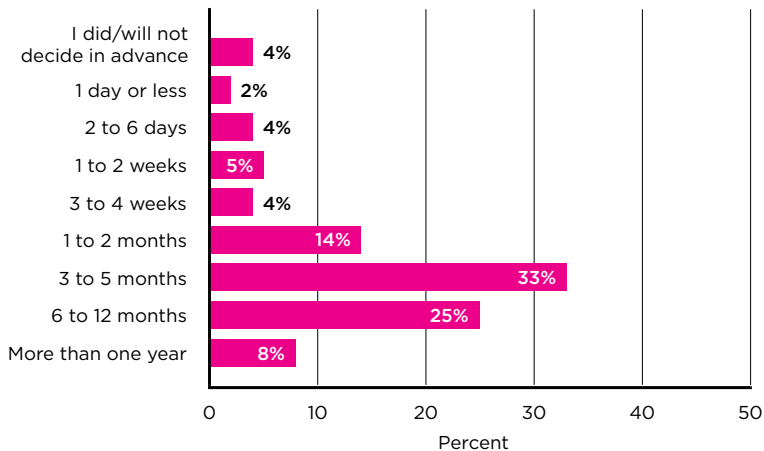
# Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: France intercontinental travelers 2018 (N=1044). 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: France intercontinental travelers 2018 (N=1044). Note: Totals may not add up to 100% due to rounding.

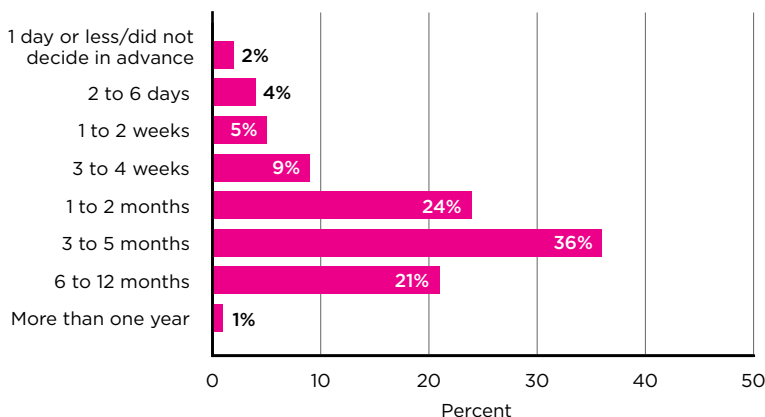






## Air Booking for Next International Trip

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: France intercontinental travelers 2018 (N=1044). 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: France intercontinental travelers (N=1044). Note: Totals may not add up to 100% due to rounding.



**39%**

I would bring it up to recommend as a destination



**28%**

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



**26%**

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

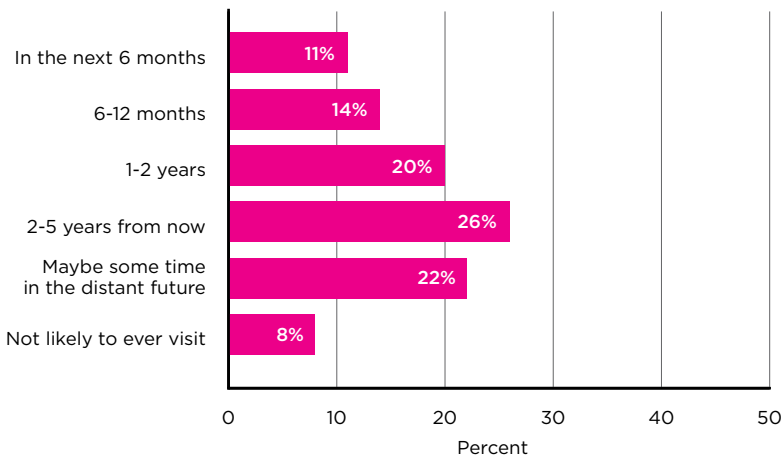


**3%**

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: France intercontinental travelers 2018 (N=1044).





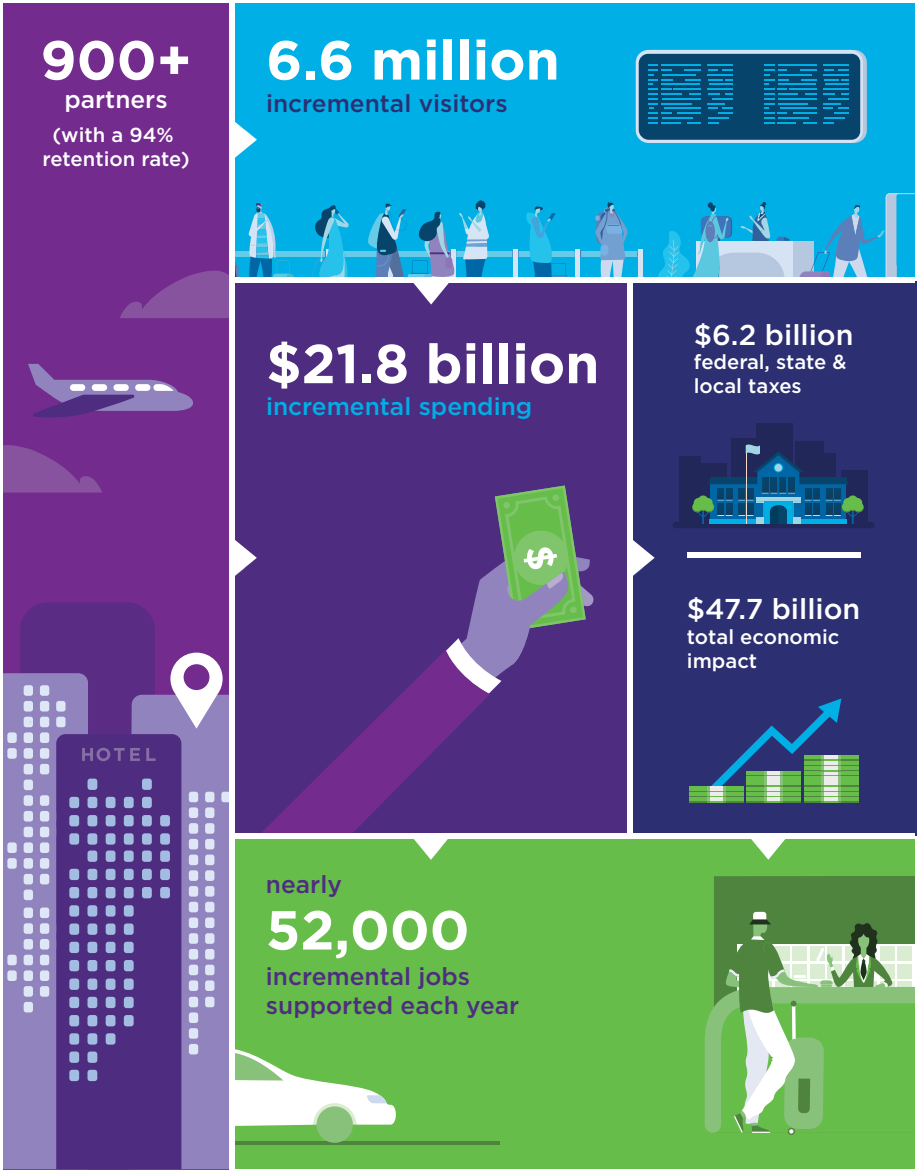
## Highlights of Success

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

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

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

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





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

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

## Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- 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, France

### How Brand USA Works with Visit USA Committees

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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 France

**Geoffrey Duval**

President

**Delphine Aubert**

Marketing & Communication Manager

*Infos@office-tourisme-usa.com*

Photos: Villefranche-sur-Mer, Côte d'Azur (left); La Défense Business District, Paris (right)  
Source: CIA World Factbook 2018, unless noted otherwise

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## 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)

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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](mailto:ntto@trade.gov)

### Selected Staff List:

#### Phil Lovas

Deputy Assistant Secretary  
for Travel and Tourism  
[Philip.Lovas@trade.gov](mailto:Philip.Lovas@trade.gov)

#### Isabel Hill

Director  
[Isabel.Hill@trade.gov](mailto:Isabel.Hill@trade.gov)

#### Julie Heizer

Team Lead, Industry Relations  
[Julie.Heizer@trade.gov](mailto:Julie.Heizer@trade.gov)

#### Brian Beall

Deputy Director, Policy and Planning  
[Brian.Beall@trade.gov](mailto:Brian.Beall@trade.gov)

#### Jennifer Aguinaga

International Trade Specialist  
[Jennifer.Aguinaga@trade.gov](mailto:Jennifer.Aguinaga@trade.gov)

#### Mark Brown

Market Research Analyst  
[Mark.Brown@trade.gov](mailto:Mark.Brown@trade.gov)

#### Richard Champley

Senior Research Analyst  
[Richard.Champley@trade.gov](mailto:Richard.Champley@trade.gov)

#### Curt Cottle

International Trade Specialist  
[Curt.Cottle@trade.gov](mailto:Curt.Cottle@trade.gov)

#### John Terpening

Economist  
[John.Terpening@trade.gov](mailto:John.Terpening@trade.gov)

#### Claudia Wolfe

Economist  
[Claudia.Wolfe@trade.gov](mailto:Claudia.Wolfe@trade.gov)

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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](http://www.export.gov).



### U.S. Commercial Service, France

**Valérie Ferrière**

*Valerie.Ferriere@trade.gov*



