



USA

VisitTheUSA.de

Brand USA

Market Information

GERMANY, AUSTRIA
& SWITZERLAND

2019

About This Guide

This market guide includes a snapshot of the economies in Germany, Austria and Switzerland, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Cover photo: Bamberg, Germany

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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: Vienna, Austria (left); Neuschwanstein Castle, Hohenschwangau, Germany (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 sectors of Germany, Austria, and Switzerland.

This guide will familiarize you with the factors that make the dynamic marketplace and its vibrant cultures of these three countries so appealing.

According to the National Travel and Tourism Office (NTTO), in 2017, nearly 2.1 million Germans traveled to the United States, ranking Germany number seven among the top 10 source markets for international visitors and ranked number ten for spend at \$8.2 billion.

In addition, 441,270 Swiss travelers and 198,713 Austrians came to the United States during 2017.

Demand for travel to the USA has remained strong, according to Germany's top tour operators, partly because of a strong euro. The Austrian market is similar, because most tour operations there are part of German-owned enterprises. In the Swiss market, the USA continues in popularity as a long-haul summer destination.

Recent research among German intercontinental travelers showed that 64 percent of those surveyed plan to make a trip to the USA in the next five years. The survey showed 37 percent would recommend the USA as a travel destination, and 26 percent would offer positive comments about the U.S. as a destination.

Brand USA launched a comprehensive storytelling strategy to create relevant, engaging, and authentic content, which presents the diversity of travel possibilities across the United States. This approach provides travelers from Germany, Austria, and Switzerland the opportunity to see the unique aspects of the United States and further encourages them to visit.



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 last year, 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 Germany, Austria, and Switzerland, and the most effective way to inspire international travelers in this collective market to book their trips to the USA now.

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

Together, we are marketing the USA!

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Market Facts



Geography

Largest Metropolitan Areas



Germany

Berlin (capital):
3.563 million

Hamburg: 1.793 million

Munich: 1.504 million

Cologne: 1.096 million

Austria

Vienna (capital):
1.901 million

Switzerland

Zürich: 1.371 million

Bern (capital): 422,000

Area

Germany

357,022 km²

Slightly smaller
than Montana

Austria

83,871 km²

About the size of
South Carolina

Switzerland

41,277 km²

Slightly less than twice
the size of New Jersey

Climate

Germany

Temperate and marine;
cool, cloudy, wet
winters and summers;
occasional warm
mountain (foehn) wind.

Austria

Temperate; continental,
cloudy; cold winters
with frequent rain and
some snow in lowlands
and snow in mountains;
moderate summers with
occasional showers.

Switzerland

Temperate, but varies
with altitude; cold,
cloudy, rainy/snowy
winters; cool to warm,
cloudy, humid summers
with occasional showers.

Demographics

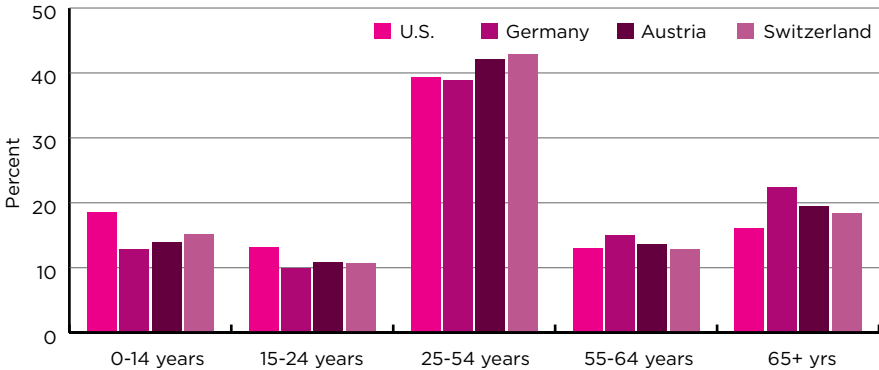
Population

	Germany	Austria	Switzerland	USA
Population size	80,457,737	8,793,370	8,292,809	329,256,465
Median age	47.4 years	44.2 years	42.5 years	38.2 years
Population growth rate (2018 est.)	-0.17	0.42	0.68	0.8%

Source: CIA World Factbook 2018



Population by Age



Economy

Germany

- **GDP:** \$4.2 trillion
- **GDP real growth rate:** 2.5%
- **GDP—per capita:** \$50,800
- **Unemployment rate:** 3.8%
- **Inflation rate:** 1.7%

Austria

- **GDP:** \$441 billion
- **GDP real growth rate:** 3%
- **GDP—per capita:** \$50,000
- **Unemployment rate:** 5.5%
- **Inflation rate:** 1.7%

Switzerland

- **GDP:** \$523.1 billion
- **GDP real growth rate:** 1.7%
- **GDP—per capita:** \$62,100
- **Unemployment rate:** 3.2%
- **Inflation rate:** 0.5%

Vacation Allocation

Vacation Allocation and Public Holidays

Salaried German employees earn an average of 28–32 days of paid vacation per year. Fortunate workers also receive either a thirteenth month salary and/or vacation bonus.

There are 10–14 public holidays, depending on the region of the country.

Primary Travel Periods and Public School Holidays

- **Easter holidays:** Two weeks in March and April
- **Summer holidays:** Six weeks of school vacation in June, July, or August
- **Fall holidays:** Two weeks in October
- **Christmas holidays:** Two weeks in December and January

Travel Trends

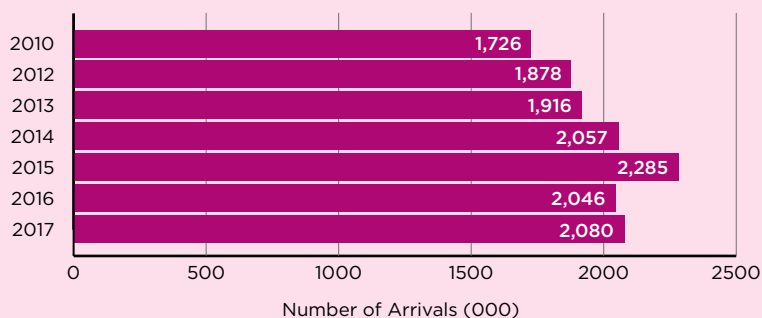


International Travel Trends: Germany

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

	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	\$6,585	\$7,464	\$7,664	\$8,295	\$8,986	\$8,136	\$8,248
Travel Receipts	\$5,363	\$5,886	\$6,023	\$6,440	\$7,180	\$6,522	\$6,568
Passenger Fare Receipts	\$1,222	\$1,578	\$1,641	\$1,855	\$1,806	\$1,614	\$1,680
Change (%) in Total Exports	14	6	3	8	8	-9	1

Visitation Trends: Arrivals



Photos: Vienna, Austria (left), Hallstatt, Austria (right)

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

Traveler Characteristics: Germany

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Business	13.1	13.4
Convention/Conference/Trade Show	5.5	6.0
Education	3.0	3.3
Vacation/Holiday	59.4	57.9
Visit Friends/Relatives	18.4	18.3
Religion/Pilgrimages	0.1	0.4
Other	0.4	0.6

All Purposes of Trip

All Purposes of Trip	2016 (%)	2017 (%)
Business	15.7	17.1
Convention/Conference/Trade Show	7.5	9.1
Education	5.2	5.5
Vacation/Holiday	70.5	69.9
Visit Friends/Relatives	31.9	30.9
Religion/Pilgrimages	0.4	0.8
Other	0.7	1.1

NET PURPOSES OF TRIP

Leisure & Visit Friends and Relatives	82.2	81.5
Business & Convention	21.1	22.9

Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean Nights)	19.1	16.8
Length of Stay in USA (Median Nights)	12	11
First International Trip to the USA (%)	18.8	21.0

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



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

U.S. Destinations/Regions	2016 (%)	2017 (%)
REGIONS		
South Atlantic	35.17	33.12
Middle Atlantic	33.90	32.51
Pacific	24.53	25.39
Mountain	14.96	14.28
West South Central	6.39	6.28
New England	8.31	7.10
East North Central	9.53	9.28
STATES/TERRITORIES		
Florida	23.06	21.83
California	22.15	23.42
New York	30.15	29.26
CITIES		
New York City	29.65	28.93
Miami	14.19	13.51
Los Angeles	22.15	23.42
San Francisco	12.56	12.12

Transportation Used in the USA



47%

Auto, rented



36%

City subway/
Tram/Bus



31%

Auto, private



25%

Air travel



24%

Taxicab/
Limousine



15%

Bus between
U.S. cities

Activity Participation While in the USA



83%

Shopping



82%

Sightseeing



45%

National parks/
monuments



41%

Small towns/
countryside



36%

Historic locations



30%

Art gallery/
Museum



29%

Experience fine
dining



24%

Guided tours



20%

Cultural/Ethnic
heritage sites



20%

Amusement
parks

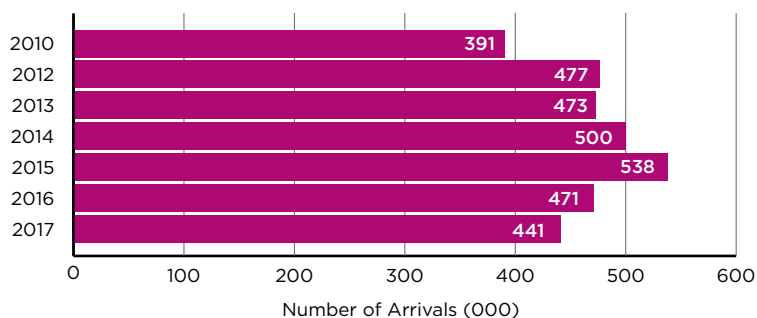


International Travel Trends: Switzerland

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

	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	\$1,713	\$2,576	\$2,580	\$2,712	\$2,815	\$2,531	\$2,357
Travel Receipts	\$1,348	\$2,058	\$1,864	\$1,919	\$2,040	\$1,774	\$1,615
Passenger Fare Receipts	\$365	\$518	\$716	\$793	\$775	\$757	\$742
Change (%) in Total Exports	-10	15	0	5	4	-10	-7

Visitation Trends: Arrivals



Traveler Characteristics: Switzerland

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Business	12.6	6.5
Convention/Conference/Trade Show	11.0	4.0
Education	6.6	5.2
Vacation/Holiday	57.4	66.3
Visit Friends/Relatives	11.9	16.9
Religion/Pilgrimages	0.0	0.5
Other	0.4	0.5

All Purposes of Trip

All Purposes of Trip	2016 (%)	2017 (%)
Business	15.2	8.3
Convention/Conference/Trade Show	13.1	4.8
Vacation/Holiday	70.8	74.5
Visit Friends/Relatives	25.7	30.0
Religion/Pilgrimages	0.3	1.6
Other	0.5	0.5
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	78.8	86.5
Business & Convention	26.4	12.3

Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean Nights)	18.2	17.2
Length of Stay in USA (Median Nights)	10	12
First International Trip to the USA (%)	14.1	15.3



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

U.S. Destinations/Regions	2016 (%)	2017 (%)
REGIONS		
Pacific	23.62	n/a
Middle Atlantic	35.67	36.54
South Atlantic	32.78	30.80
STATES/TERRITORIES		
Florida	24.80	n/a
California	22.71	n/a
New York	33.19	34.94
CITIES		
New York City	32.55	34.25

Transportation Used in the USA



44%

Auto, rented



35%

City subway/
Tram/Bus



32%

Taxicab/
Limousine



28%

Auto, private
or company



25%

Air travel
between U.S.
cities



16%

Ferry/River
taxi/Short
scenic cruise

Activity Participation While in the USA



83%

Shopping



76%

Sightseeing



46%

National parks/
Monuments



42%

Experience fine
dining



40%

Small towns/
Countryside



36%

Historic locations



30%

Art gallery/
Museum



28%

Amusement
parks



21%

Cultural/Ethnic
heritage sites



20%

Guided tours

Air Travel Information



Non-Stop Flights from Germany to the USA

Airline	Flights From	Flights to	Plane	Frequency (week)
American	FRA, Frankfurt	DFW, Dallas	Boeing 777-200	7
American	FRA, Frankfurt	CLT, Charlotte	Airbus A330-200	7
American	MUC, Munich	PHL, Philadelphia	Airbus A330-200	7
Delta	FRA, Frankfurt	ATL, Atlanta	Boeing 767-300 ER	7
Delta	FRA, Frankfurt	JFK, New York	Boeing 767-300 ER	7
Delta	FRA, Frankfurt	DTW, Detroit	Boeing 767-300 ER	7
Delta	STR, Stuttgart	ATL, Atlanta	Boeing 767-400 ER	7
Delta	DUS, Düsseldorf	ATL, Atlanta	Boeing 767-400 ER	7
Delta	MUC, Munich	ATL, Atlanta	Boeing 767-400 ER	7
Delta	MUC, Munich	DTW, Detroit	Boeing 767-300 ER	7
Delta	TXL, Berlin Tegel	JFK, New York	Boeing 767-300 ER	7
Condor	FRA, Frankfurt	ANC, Anchorage	Boeing 767-300	4
Condor	FRA, Frankfurt	AUS, Austin	Boeing 767-300	3
Condor	FRA, Frankfurt	BWI, Baltimore/ Washington	Boeing 767-300	4
Condor	FRA, Frankfurt	FAI, Fairbanks	Boeing 767-300	1
Condor	FRA, Frankfurt	LAS, Las Vegas	Boeing 767-300	4
Condor	FRA, Frankfurt	MSP, Minneapolis	Boeing 767-300	4
Condor	FRA, Frankfurt	MSY, New Orleans	Boeing 767-300	2
Condor	FRA, Frankfurt	PDX, Portland	Boeing 767-300	4
Condor	FRA, Frankfurt	PHX, Phoenix	Boeing 767-300	2
Condor	FRA, Frankfurt	PIT, Pittsburgh	Boeing 767-300	3
Condor	FRA, Frankfurt	SEA, Seattle	Boeing 767-300	7

Photos: Berlin, Germany (left); Gesäuse National Park, Austria (right)

Source: Brand USA Proprietary Research

Airline	Flights From	Flights to	Plane	Frequency (week)
Condor	FRA, Frankfurt	SJU, San Juan	Boeing 767-300	1
Eurowings -Bonn	CGN Cologne	RSW, Fort Meyers	Airbus A330	1
Eurowings -Bonn	CGN Cologne	SEA, Seattle	Airbus A330	2
Eurowings -Bonn	CGN Cologne	LAS, Las Vegas	Airbus A330	1
Eurowings -Bonn	CGN Cologne	LAS, Las Vegas	Airbus A330	2
Eurowings -Bonn	MUC, Munich	RSW, Fort Meyers	Airbus A330	2
Eurowings -Bonn	DUS, Dusseldorf	JFK, New York	Airbus A330	6
Eurowings -Bonn	DUS, Dusseldorf	RSW, Fort Meyers FL	Airbus A330	3
Eurowings -Bonn	DUS, Dusseldorf	MIA, Miami	Airbus A330	3
Lufthansa	DUS, Dusseldorf	EWB, Newark	Airbus A330	6
Lufthansa	FRA, Frankfurt	JFK, New York	Boeing 747-800	7
Lufthansa	FRA, Frankfurt	JFK, New York	Airbus 380	7
Lufthansa	FRA, Frankfurt	EWB, Newark	Boeing 747-800	7
Lufthansa	FRA, Frankfurt	IAD, Washington	Boeing 747-800	7
Lufthansa	FRA, Frankfurt	IAD, Washington	Boeing 747-400	7
Lufthansa	FRA, Frankfurt	BOS, Boston	Boeing 747-400	7
Lufthansa	FRA, Frankfurt	BOS, Boston	Airbus A330	7
Lufthansa	FRA, Frankfurt	PHL, Philadelphia	Airbus 340-400	7
Lufthansa	FRA, Frankfurt	ORD, Chicago	Boeing 747-800	7
Lufthansa	FRA, Frankfurt	ORD, Chicago	Boeing 747-800	7
Lufthansa	FRA, Frankfurt	DFW, Dallas	Airbus 330	7
Lufthansas	FRA, Frankfurt	IAH, Houston	Airbus 380	7
Lufthansa	FRA, Frankfurt	DTW, Detroit	Boeing 747-400	7
Lufthansa	FRA, Frankfurt	ATL, Atlanta	Airbus 330	7
Lufthansa	FRA, Frankfurt	DEN, Denver	Boeing 747-400	7
Lufthansa	FRA, Frankfurt	SFO, San Francisco	Airbus 380	7
Lufthansa	FRA, Frankfurt	LAX, Los Angeles	Boeing 747-800	7
Lufthansa	FRA, Frankfurt	LAX, Los Angeles	Airbus 340-600	7



Airline	Flights From	Flights to	Plane	Frequency (week)
Lufthansa	FRA, Frankfurt	MCO, Orlando	Boeing 747-400	7
Lufthansa	FRA, Frankfurt	MIA, Miami	Airbus 380	7
Lufthansa	FRA, Frankfurt	TPA, Tampa	Airbus 340-400	5
Lufthansa	FRA, Frankfurt	SEA, Seattle	Boeing 747-400	7
Lufthansa	FRA, Frankfurt	SAN, San Diego	Airbus 340-400	5
Lufthansa	MUC, Munich	SJC, San Jose	Airbus 340-400	5
Lufthansa	MUC, Munich	JFK, New York	Airbus 340-600	7
Lufthansa	MUC, Munich	EWB, Newark	Airbus 340-600	7
Lufthansa	MUC, Munich	IAD, Washington	Airbus 330	7
Lufthansa	MUC, Munich	BOS, Boston	Airbus 350	7
Lufthansa	MUC, Munich	CLT, Charlotte	Airbus 330	7
Lufthansa	MUC, Munich	ORD, Chicago	Airbus 340-600	7
Lufthansa	MUC, Munich	ORD, Chicago	Airbus 330	3
Lufthansa	MUC, Munich	SFO, San Francisco	Airbus 340-600	7
Lufthansa	MUC, Munich	LAX, Los Angeles	Airbus 380	7
Lufthansa	MUC, Munich	DEN, Denver	Airbus 330	7
Singapore	FRA, Frankfurt	JFK, New York	Airbus 380	7
United	FRA, Frankfurt	ORD, Chicago	Boeing 777	14 (2x daily)
United	FRA, Frankfurt	IAD, Washington	Boeing 777	14 (2x daily)
United	FRA, Frankfurt	IAH, Houston	Boeing 777	7
United	Frankfurt	SFO, San Francisco	Boeing 777 and Boeing 787	14
United	MUC, Munich	ORD, Chicago	Boeing 777	7
United	MUC, Munich	IAH, Houston	Boeing 767	7
United	MUC, Munich	EWB, Newark	Boeing 767	7
United	MUC, Munich	SFO, San Francisco	Boeing 787	7
United	MUC, Munich	IAD, Washington	Boeing 777	7
United	HAM, Hamburg	EWB, Newark	Boeing 757	7
United	TXL, Berlin Tegel	EWB, Newark	Boeing 767	7

Market Snapshot



Snapshot: Germany

Overall Economic Situation

Germany's economic growth is projected to decline but remain solid, backed by strong job creation and a fiscal stimulus. That's according to a statement issued in November 2018 by the Organization for Economic Cooperation and Development (OECD) on the country's current and projected economic outlook. It further said trade-related uncertainties and moderating world demand will weigh on exports. Private consumption will accelerate due to strong wage growth and fiscal measures that increase household disposable income. Low interest rates, high capacity utilization, and growing housing demand will support residential and business investment. The current account surplus will fall as stronger domestic demand fuels imports. Strong cyclical revenue growth will keep the fiscal balance in surplus. Fiscal space should be used to increase spending on education, high-speed broadband, and low-emission transport infrastructure, which would strengthen productivity growth and inclusiveness. Tax reductions for low-wage and second earners, along with higher environmental and real estate taxes, would promote greener and more inclusive growth. Strengthening lifelong learning would help workers cope with technological changes and prepare for the future of work.

Strong export growth came to a halt in 2018, on the back of uncertainties about trade policies. Moreover, new emission tests caused delays in car production. Business confidence and the appetite for investment, however, are still strong due to high capacity utilization and low credit costs. Immigration,

Photos: Freiburg im Breisgau, Germany (left); Munich, Germany (right)



rising household incomes, and low interest rates have boosted housing demand and construction. House prices have risen markedly, especially in urban areas where the supply of buildable land is scarce and inflexible.

Vigorous employment gains have pushed the unemployment rate to a record low, while the number of vacant jobs has continued to rise, in long-term care and construction. The strong labor market has resulted in a broad-based wage growth, which supports private consumption.

Job quality also has improved as

the number of full-time permanent contracts has grown strongly. Headline inflation has picked up recently on the back of higher energy prices, but the core inflation rate remains modest. Fiscal policies should aim to improve productivity growth and inclusiveness. Fiscal policy is supporting the expansion. Child tax allowances and benefits are increasing along with pensions for mothers, while social contributions will be lower, in particular for low-paid jobs. The government plans to invest EUR 37.9 billion per year from 2019 in infrastructure, education, housing, and digital technology. A fund of EUR 2.4 billion was set up to expand high-speed broadband and support municipalities' investment in digital infrastructure in schools. Such discretionary tax cuts and spending increases will reduce the government budget balance in 2019 and 2020. Most of these fiscal measures are appropriate, as they promote long-run growth and inclusiveness.

Economic growth will decline due to slower growth of external demand and higher uncertainty. It will, however, remain solid, supported by strong private consumption and expansionary fiscal policy. Capacity constraints and labor shortages will constrain production, especially in the construction sector, increasing wage and price inflation. Strong domestic demand will continue to contribute to dynamic import growth and thereby narrow somewhat the large current account surplus. A further rise in protectionism would weigh on economic growth and employment, particularly if it involved slower growth in China or tariffs on Germany's car exports. Renewed financial market

Germany's economic growth is projected to decline but remain solid, backed by strong job creation and a fiscal stimulus.

turbulence and economic shocks in large European economies would also reduce exports. On the other hand, successful integration of immigrants into the labor market, improved education and training, and an increase in women's working hours because of recent reform efforts can alleviate labor shortages and allow companies to expand production.

German Travel Industry

According to the German Travel Association's (DRV) annual survey, there were a total of 11,422 travel agencies in Germany in 2017, a decrease of two percent compared to 2016 (11,116). In 2017, the turnover of EUR 33.7 billion (2016: 31.2 billion) generated by tour operators represents a market share of 52.1 percent, while service providers rank second with a 36.8 percent market share (EUR 23.8 billion), and product portals and others combine for the remaining 11.1 percent (EUR 7.2 billion). Online bookings generated a total turnover of EUR 25.9 billion (40 percent), while offline bookings generated a total turnover of EUR 38.8 billion (60 percent). While the online market is growing, offline and travel agencies continue to be important in the German market.

The overall outlook for 2019 is positive among German travel agents, according to the December 2018 "sales climate index" by Germany's leading travel trade magazine, *fvtw*. In fact, the current 2018/2019 winter season and 2019 summer are showing solid growth of seven percent and five percent respectively, after good early bookings.

German Travel Behavior

According to the annual consumer survey, "Reiseanalyse" conducted by FUR (Forschungsgemeinschaft für Urlaub und Reisen e.V.), the demand for travel remains at a high level. A total of 69.6 million holidays of five days or more were booked in 2017, with a total of 77 percent of the German population going on a holiday of at least five days or more. A total of 72.4 percent of all trips led travelers abroad, and a total of 13.1 percent (2016: 11.4 percent) of all trips were long-haul, both representing all-time records.



Overall, spending on international holidays reached EUR 73.6 billion in 2017 (2016: 73.3 billion) and the average trip lasted 13.1 days. The outlook is positive, with 78 percent of Germans planning at least one holiday of five days or more in 2018 (2017: 75 percent).

German Travel to North America

The visitation numbers from Germany in 2017 were reported at 2.08 million visitors by the U.S. Department of Commerce National Travel & Tourism Office. That represented a slight increase compared to 2016, at 2.03 million, and the third best visitation of all time. Full 2018 data is not available yet.

Policies introduced by the U.S. administration generated worries in the travel industry that foreign tourists could be put off by restrictions such as the travel ban for visitors holding a certain passport. Germany's top tour operators, however, did not observe any negative developments as the demand for travel to the United States remains high, the German press agency DPA found in a survey.

Sources:

ADAC Reisemonitor,

DPA (Deutsche Presse-Agentur),

DRV (Deutscher Reiseverband),

fww, FUR (Forschungsgemeinschaft für Urlaub und Reisen e.V.),

OECD (Organization for Economic Cooperation and Development),

Statista,

U.S. Department of Commerce, National Travel & Tourism Office

Snapshot: Austria

Overall Economic Situation

Economic growth is projected to remain solid for Austria, but will slow in 2019 and 2020, according to the Organization for Economic Cooperation and Development (OECD). A deterioration in the external environment will damp export and investment growth. Solid employment growth is fostering wage and private consumption growth. Inflation remains moderate. Robust economic growth, a low interest rate environment, and efforts to constrain government spending have helped to reduce public deficits.

A broad-based combination of internal and external drivers continues to support economic growth. Strong demand and capacity constraints on current production facilities are favoring the expansion of business investment, although skill shortages and regulatory barriers may hold back scope for productivity gains. Further reductions in the unemployment rate and high levels of job vacancies are contributing to wage growth and robust private consumption, although an inflow of foreign labor, rising participation rates of women and the elderly, and collective wage bargaining are helping to moderate the impact of the tightness of the labor market.

Following the broad-based upswing in 2018, economic growth is projected to revert toward the potential growth rate of around 2 percent in 2019 and 2020. This reflects capacity constraints holding back production and a weaker external environment. Private consumption will remain solid. Inflation is set to slow to 2 percent over the coming two years. Uncertainties surrounding global trade, the euro area, and Brexit could further damp exports and investment. Private consumption could surprise on the upside if the current positive sentiment persists, and strong competitiveness could lead to higher-than-expected export growth.

Austrian Travel Industry & Travel Behavior

The Austrian market is very similar to the German market, as five of the top seven Austrian tour operators are owned by German tour operators. Two major players dominate the market—UI and Thomas Cook—with a combined market share of about 50 percent.

Following natural disasters, political changes, and insolvencies of airlines, Austrians seek the security of a package holiday. Austrians continuously favor long-distance journeys, especially to the Americas which are preferred to Asia and Africa (288,000 travelers compared to 265,000 and 200,000 respectively). If Austrian travelers could choose one destination of their dream, regardless of cost and time involved, the United States would be the preferred destination with 11.2 percent, a 2018 Allianz Global Assistance survey found. The 2017 visitation numbers to the USA from



Austria were reported at 198,713 visitors (2016: 198,530) by the U.S. Department of Commerce National Travel & Tourism Office. Full 2018 data is not available yet.

Sources:

OECD (Organization for Economic Cooperation and Development),

Allianz Global Assistance,

NTTO (U.S. Department of Commerce National Travel & Tourism Office)

Snapshot: Switzerland

Overall Economic Situation

The Switzerland GDP growth has been buoyant in recent quarters and is projected to be about 1.5 percent over the next two years, according to the Organization for Economic Cooperation and Development (OECD). Domestic demand will gain strength, supported by household consumption. However, the boost to exports from the earlier exchange rate depreciation and one-off events will fade. The large current account surplus will narrow slightly. Inflation will pick up gradually but remain moderate. Monetary policy rates are projected to start to increase in the second half of 2019 but to remain negative through 2020. The fiscal stance will become slightly expansionary as exceptional revenues unwind. Pension reform is urgent as population aging weighs on pension system funding. Reducing the cost of childcare and expanding its supply could encourage women's full participation in the economy.

The economy has expanded strongly, growing 3.2 percent year-over-year in the first half of 2018. The manufacturing sector has been the main engine of growth, but receipts from special international sports events to their Swiss-based federations also contributed to the exceptional outcome. Faster growth of export markets as well as exchange rate depreciation have boosted manufacturing exports. Gross fixed investment has been solid despite a recent slowdown. GDP growth is set to slow but remain above

A total of 47 percent of Swiss travelers book at least one holiday a year in a stationary travel agency, particularly for long-haul travel.

potential. Household consumption will gain momentum, supported by real wage gains and falling unemployment. Investment growth will slow but remain strong. Failure of the ongoing negotiations with the European Union to establish a consolidated institutional framework could hamper the close economic relationship Switzerland now enjoys. Rising global tensions could entail a further appreciation of the Swiss franc, damping exports. Conversely, households' optimism may lead to a sharper decline in their saving ratio and higher consumption growth, narrowing the current account surplus.

Profile of Average Swiss Traveler to the USA

Swiss tourists to the USA typically like to travel individually or in small groups. It provides them with creative freedom, which is important for a mature market with some 75 percent of "repeat visitors." Swiss travelers enjoy above-average purchasing power. On average, Swiss travelers spend \$4,840 while in the United States. The Swiss value punctuality and quality service at restaurants and hotels. Quality is a prime criterion before price. The language hurdle tends to be quite low.

Swiss Travel Industry & Travel Behavior

A study conducted by Allianz Global Assistance in 2018 found that the booking behavior of Swiss travelers remains very stable—online travel agencies retain their high market share of previous years with 71 percent of all bookings. A total of 47 percent of Swiss travelers book at least one holiday a year in a stationary travel agency, particularly for long-haul travel. The Maldives and Canary Islands are the most popular destinations during the winter months, while Spain, the United States, and Greece are the most popular summer destinations. The 2017 visitation numbers to the USA from Switzerland were reported at 441,270 visitors by the U.S. Department of Commerce National Travel & Tourism Office. Full 2018 data is not available yet.

Sources:

OECD (Organization for Economic Cooperation and Development),

Allianz Global Assistance,

NTTO (U.S. Department of Commerce National Travel & Tourism Office)

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: Berlin, Germany (left); Grindelwald, Switzerland (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	<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/GoUSAofficial 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: Germany

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=1040).

Base: Germany intercontinental travelers.



38%

Cultural historic attractions



37%

Ecotourism and nature



35%

Dining/gastronomy



32%

Urban attractions



32%

Shopping

Top Five Strongest Impressions of the USA

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

54%

Diverse

43%

Adventurous

32%

Forward-thinking

29%

Friendly

29%

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: Germany intercontinental travelers (N=1040).



53%

Websites
via computer



38%

Personal advice
from family/
friends



31%

Information
in print travel
guidebooks



26%

Websites/
applications
via tablet

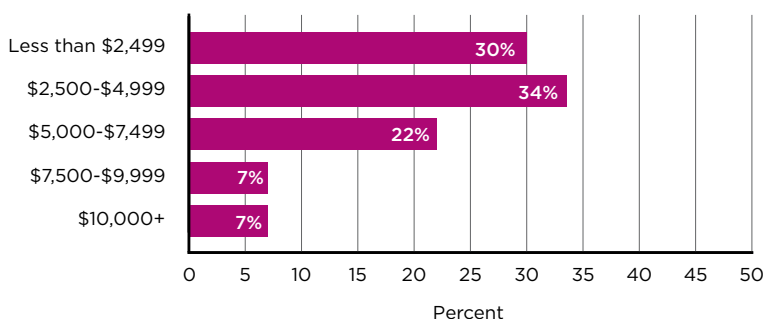


23%

Personal advice
from travel
professionals/
travel agents

Expected Household Travel Spend for Next Intercontinental Trip

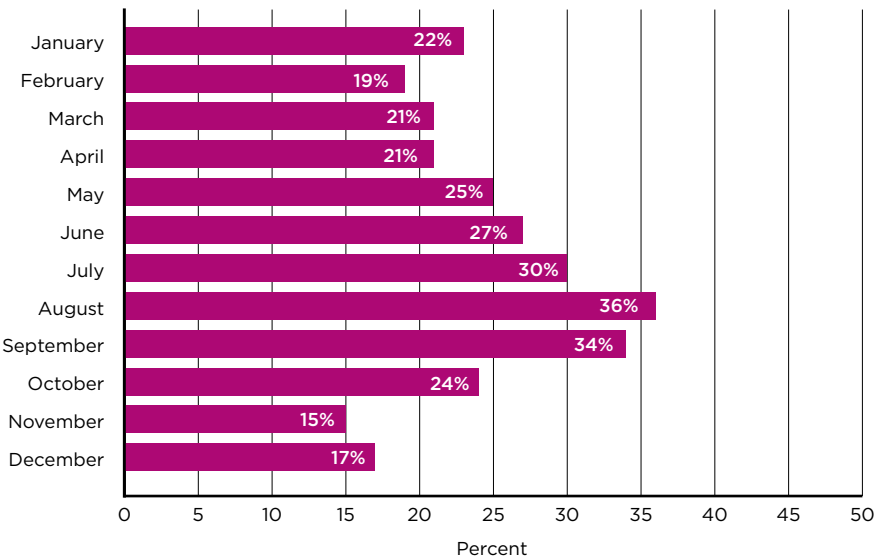
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: Germany intercontinental travelers (N=1040). Note: Totals may not add up to 100% due to rounding (Conversion EUR to USD= 1.129).



Mean: \$4,648 Median: \$3,952

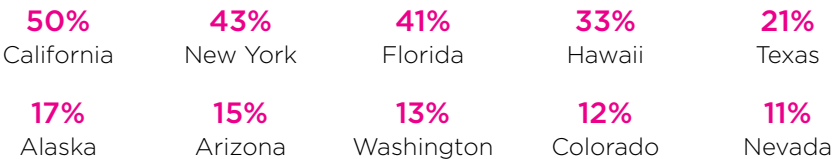
Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: Germany intercontinental travelers 2018 (N=1040).



Destination Interest—Top 10 States

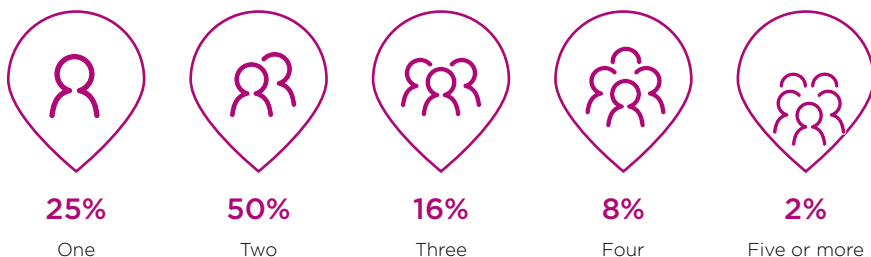
Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: Germany intercontinental travelers with interest in visiting the United States (N=1040).





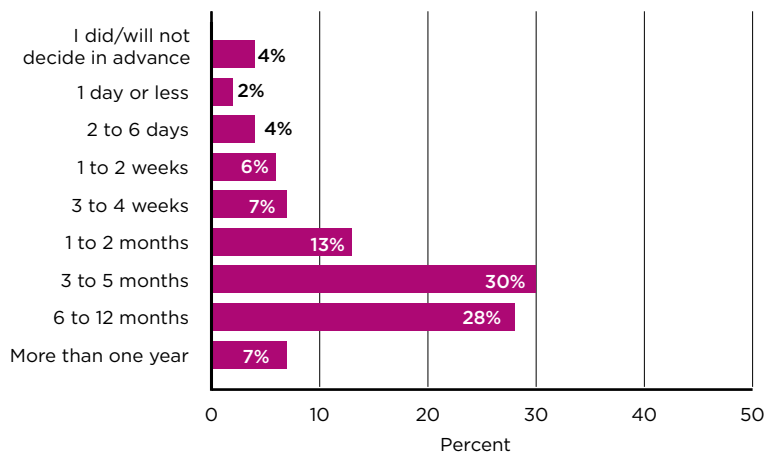
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Germany intercontinental travelers 2018 (N=1040). Note: Totals may not add up to 100% due to rounding.



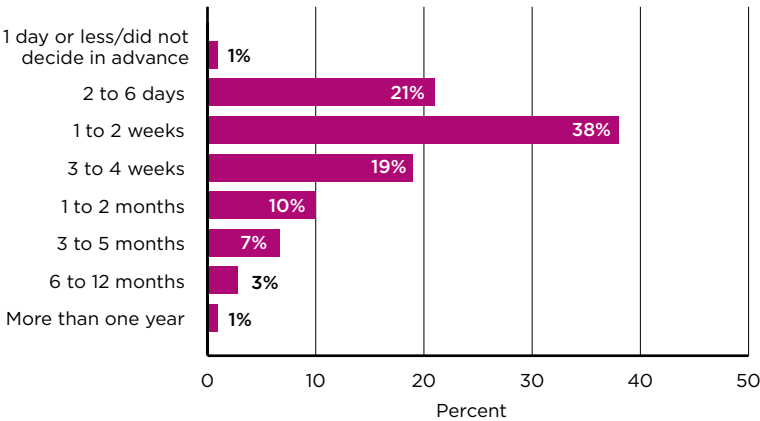
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Germany intercontinental travelers 2018 (N=1040). 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: Germany intercontinental travelers 2018 (N=1040). 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? Germany intercontinental travelers (N=1040). Note: Totals may not add up to 100% due to rounding.



37%

I would bring it up to recommend as a destination



26%

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



6%

I would tell people negative things if it were brought up



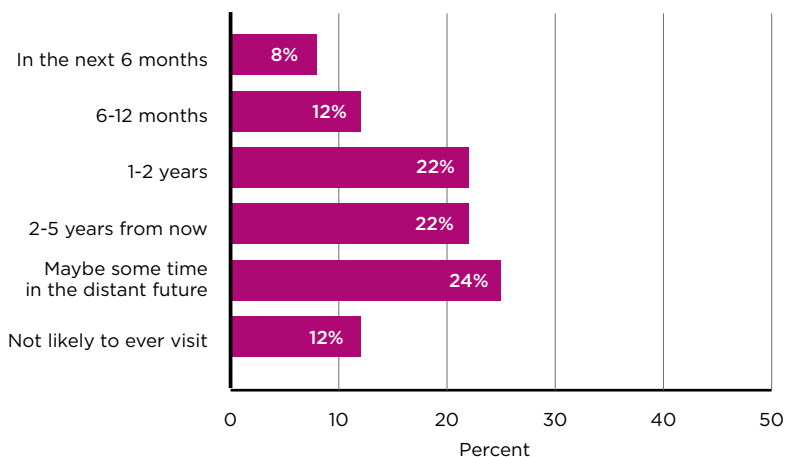
6%

I would bring it up to discourage people from traveling there



Likelihood of Travel to the USA

Question: *When, if ever, are you likely to visit the following countries?* Base: *Germany intercontinental travelers 2018 (N=1040).*



Highlights of Success

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

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

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



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

900+
partners
(with a 94%
retention rate)

6.6 million
incremental visitors



\$21.8 billion
incremental spending



\$6.2 billion
federal, state &
local taxes



\$47.7 billion
total economic
impact



nearly
52,000
incremental jobs
supported each year



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

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

Brand USA Markets

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

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

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom



These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA's cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets, including:

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

Brand USA Partnerships



Visit USA Committees

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 Committees

Austria

Werner O. Marschall, President
Peter Kratochwill, Vice President
USAHQ@Visit-USA.at

Germany

Hans L. Gesk, President
Cristian Meuter, General Manager
Tilo Krause-Dünnow, Vice President

Switzerland

Heinz Zimmermann, Chairman
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Admin@VUSA.ch

Photos: Lake Maggiore, Switzerland (left); Basel, Switzerland (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.

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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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