

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

GoUSA.in

Brand USA

Market Information

INDIA

2019

About This Guide

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

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Brand USA



Who We Are

Our Mission

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

Building on Success

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked in close partnership with more than 900 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

Photos: Rajasthan (left); Kerala (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 India.

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

Nearly 1.3 million travelers from India visited the United States during 2017, and India ranked number six in the top 10 markets for the amount spent, at \$14.7 billion. India is a growing source market for U.S. travel and is a country with more than 50 million passport holders, a number that is expected to increase.

Recent research among India travelers showed 89 percent of those surveyed plan to make a trip to the USA in the next five years, 49 percent would recommend the USA as a travel destination, and 33 percent would offer positive comments about the USA 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 further encourages travelers from India 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.



- Last year we premiered our giant-screen film *America's Musical Journey*, which 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*, is also 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.
- In 2018, we had our largest U.S. delegation take part in the seventh annual India sales mission held in Mumbai, New Delhi, and Bengaluru. The mission involved a U.S. contingent of 42 companies and 63 delegates that met with the travel trade in India.

I encourage you to talk to our team about destinations in the USA, the opportunities we offer to enhance your marketing efforts in India, and the most effective ways 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

Area

3.28 million km²

World rank: 8

Slightly more than one-third the size of the United States.

Climate

Varies from tropical monsoon to temperate in the north.

Largest Metropolitan Areas



Photos: Punjab (left); Mumbai (right)

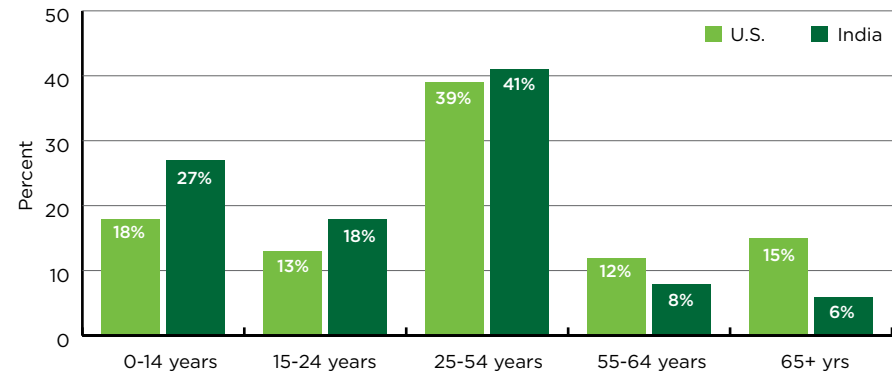
Source: CIA World Factbook 2018

Demographics

Population

| | India | USA |
|------------------------------------|--------------|-------------|
| Population size | 1.3 billion* | 329,256,465 |
| Median age | 28 years | 38 years |
| Population growth rate (2018 est.) | 1.14% | 0.81% |

Population by Age



Economy

- **Growth Domestic Product (GDP):** \$9.474 trillion
- **GDP real growth rate:** 6.7%
- **GDP—per capita:** \$7,200
- **Unemployment rate:** 8.5%
- **Inflation rate:** 3.6%

**July 2018 est.
Source: CIA World Factbook 2018*



Vacation Allocation and Public Holidays

Salaried Indian employees have an average of 25–30 days of paid vacation per year.

India, being a culturally diverse and fervent society, celebrates various holidays and festivals. There are approximately 14–17 public holidays depending on the region of the country. However, these holidays are not combined with weekends.

Primary Travel Periods and Public School Holidays

- **May–July:** School summer holidays
- **October:** Two weeks break for Diwali/Dussehra (Indian Hindu festivals)
- **December:** Christmas/winter holidays

Top Activities While Traveling in the USA

The changing profile of the Indian traveler offers great opportunity—the Indian outbound traveler is well-informed, sophisticated, and educated. They are increasingly looking for “rich experiences” through a varied range of activities and attractions. Niche products are gaining popularity, especially for the luxury segment.

- Main interests—sightseeing, nightlife and entertainment, theme parks, fine dining, and shopping
- Adventure and outdoor activities are in high demand

Travel Trends

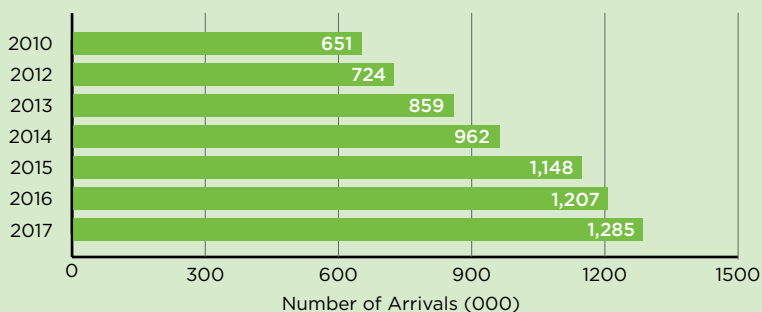


International Travel Trends

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

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|----------|-----------|-----------|-----------|-----------|-----------|
| Total Travel & Tourism Exports | \$8,092 | \$8,888 | \$10,078 | \$12,150 | \$13,414 | \$14,701 |
| Travel Receipts | \$6,604 | \$7,354 | \$8,330 | \$10,436 | \$12,101 | \$13,370 |
| Passenger Fare Receipts | \$1,488 | \$1,534 | \$1,748 | \$1,714 | \$1,313 | \$1,331 |
| Change (%) in Total Exports | 4 | 10 | 13 | 21 | 10 | 10 |

Visitation Trends: Arrivals



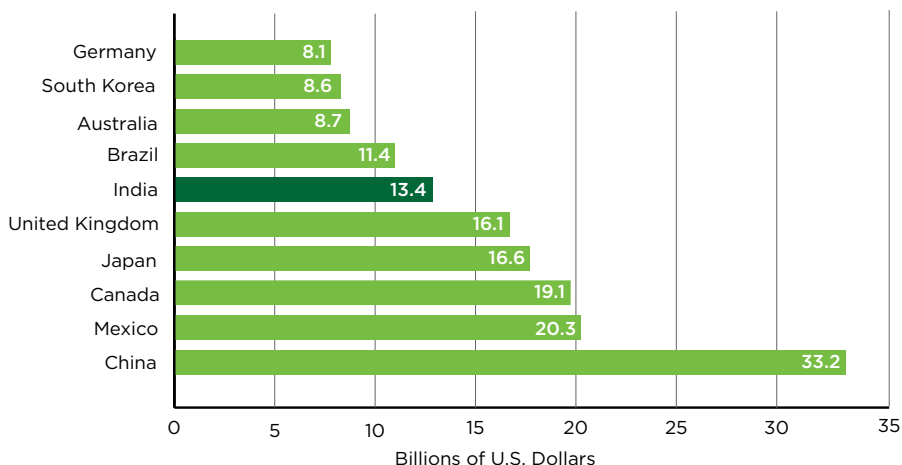
Photos: University of Mumbai (left); Amritsar, Punjab (right)

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



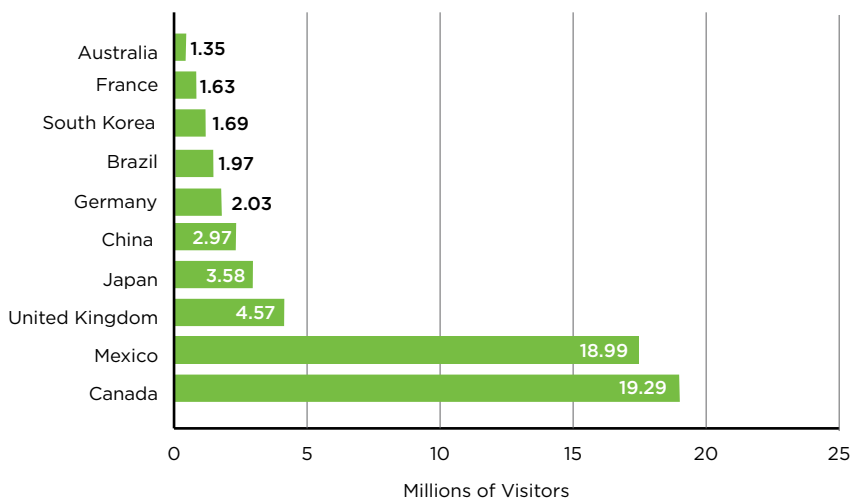
Inbound Travel Trends

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 (%) |
|---|----------|----------|
| Business | 39.2 | 39.2 |
| Visit Friends/Relatives | 27.6 | 30.9 |
| Vacation/Holiday | 17.5 | 14.0 |
| Convention/Conference/Trade Show | 9.7 | 9.4 |
| Education | 4.8 | 6.0 |
| Other | 0.3 | 0.5 |
| Religion/Pilgrimages | 0.5 | 0.1 |
| Health Treatment | 0.3 | 0.0 |

All Purposes of Trip

| All Purposes of Trip | 2016 (%) | 2017 (%) |
|---|----------|----------|
| Business | 43.8 | 43.4 |
| Visit Friends/Relatives | 38.8 | 39.6 |
| Vacation/Holiday | 26.6 | 26.6 |
| Convention/Conference/Trade Show | 15.5 | 15.5 |
| Education | 6.3 | 6.3 |
| Other | 0.6 | 0.7 |
| Health Treatment | 0.3 | 0.1 |
| Religion/Pilgrimages | 1.0 | 0.1 |

NET PURPOSES OF TRIP

| | | |
|--|------|------|
| Business & Convention | 52.7 | 51.2 |
| Leisure & Visit Friends and Relatives | 50.7 | 51.6 |

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



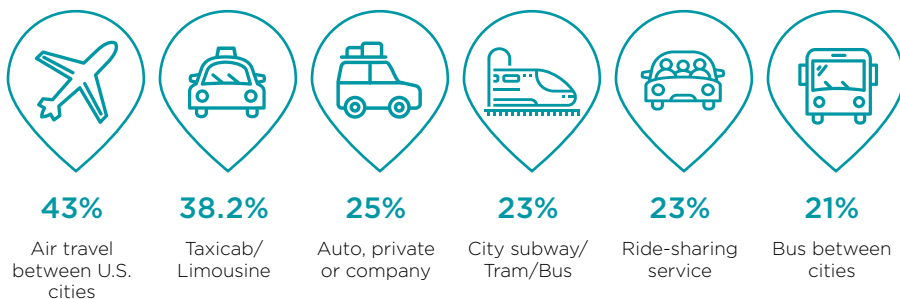
Select Traveler Characteristics

| Traveler Characteristics | 2016 | 2017 |
|---------------------------------------|------|------|
| Length of Stay in USA (Mean Nights) | 36.9 | 38.1 |
| Length of Stay in USA (Median Nights) | 19 | 16 |
| First International Trip to the USA | 31.3 | 33.4 |

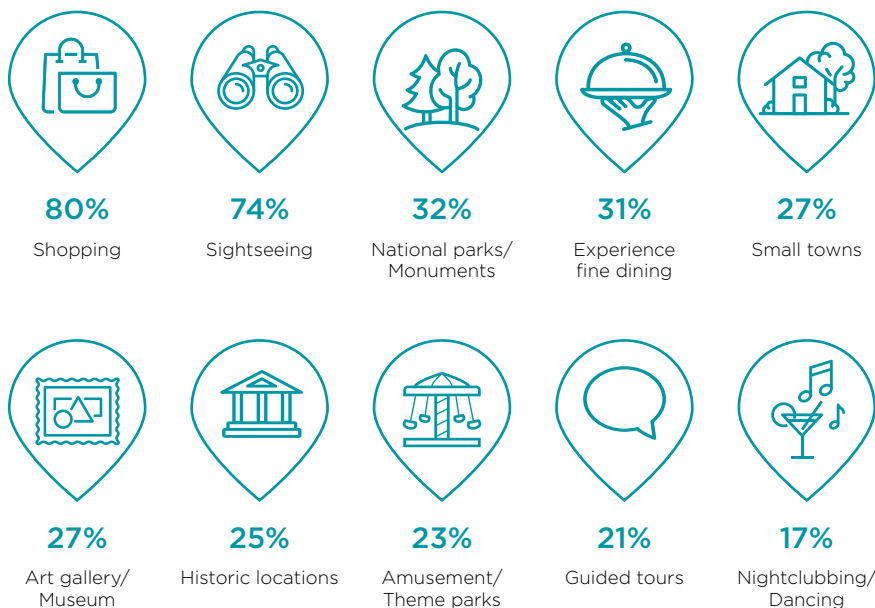
USA Destinations Visited (States, Cities, and Regions)

| U.S. Destinations/ Regions | Market Share 2016 (%) | Market Share 2017 (%) |
|--------------------------------|--------------------------|--------------------------|
| REGIONS | | |
| Pacific | 30.12 | 30.63 |
| Middle Atlantic | 34.93 | 35.28 |
| South Atlantic | 24.60 | 25.30 |
| East North Central | 15.35 | 18.68 |
| West South Central | 14.30 | 14.22 |
| Mountain | 10.32 | n/a |
| New England | 9.29 | n/a |
| STATES/TERRITORIES | | |
| Illinois | 9.76 | n/a |
| New Jersey | 9.16 | |
| New York | 26.95 | 25.00 |
| California | 25.88 | 25.80 |
| Florida | 9.13 | n/a |
| Washington, DC (metro area) | 9.05 | n/a |
| Texas | 13.49 | 13.20 |
| CITIES | | |
| New York City | 24.81 | 24.39 |
| Los Angeles | 9.27 | n/a |
| San Francisco | 11.32 | n/a |

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



Airlines

All major airlines offer good connectivity to the United States.

Direct air services are offered by Air India and United Airlines, however, there are several options available via the Atlantic, Pacific, and the Middle East.

Direct

- Air India, the national carrier, provides service from 69 cities in India to the United States. Air India offers 36 weekly flights to five destinations in the United States—San Francisco, New York, Chicago, Newark, and Washington, DC. Air India is a Star Alliance member.
- United Airlines offers seven weekly direct flights each from Mumbai and New Delhi into Newark Airport, New Jersey.

Middle East Carriers

- Emerging trends indicate the rise of Middle East carriers as important players for flights into the United States. The leading carriers are Emirates Airlines, Turkish Airlines, Etihad Airways, and Qatar Airways.
- Emirates Airlines connects nine cities from India to 11 U.S. destinations with 101 weekly via their hub in Dubai.
- Etihad Airways offers 175 weekly flights from 11 cities in India to Abu Dhabi. It currently has 32 weekly flights to the USA via Abu Dhabi to New York, Washington, DC, Chicago, and Los Angeles.

Photos: Kerala (left); New Delhi (right)
Source: Brand USA Proprietary Research

-
- Qatar Airways operates 102 weekly flights into Doha from 13 cities in India into 10 destinations in the USA via their hub in Doha.
 - Turkish Airlines operates 14 weekly flights into their hub in Istanbul from two cities in India, New Delhi and Mumbai. They service nine destinations in the USA with 75 weekly flights from their hub in Istanbul.

Atlantic Carriers

- British Airways, Lufthansa, and KLM Royal Dutch Airlines are key players to the United States, with service from several cities in India.
- American Airlines codeshares with British Airways from India and connects via London Heathrow to the United States. There are 49 weekly codeshare flights with British Airways, connecting passengers via London to nine hubs in the US, which further connects to 280 destinations across the country.
- The joint venture between Air France-KLM, and Delta Air Lines provides customers with access to more than 270 destinations beyond 27 North American cities.
- Lufthansa operates 48 weekly flights from five major cities in India to its hub in Frankfurt and Munich, connecting onward to 18 destinations in the United States.
- British Airways flies 49 weekly flights from five cities in India to its hub in London. The hubs in India are Bengaluru, Chennai, Mumbai, New Delhi, and Hyderabad. British Airways' route network currently serves more than 280 routes around the world.
- Virgin Atlantic operates seven weekly flights from New Delhi to London Heathrow. From its base, it flies to 10 destinations in the United States.

Pacific Carriers

- Cathay Pacific flies 48 weekly flights from six cities in India to their hub, along with the Cathay Dragon Air network. The hubs in India are Bangalore, Chennai, Hyderabad, Mumbai, Delhi, and Kolkata. Cathay Pacific flies 104 weekly flights into six destinations in the United States via their hub in Hong Kong.



- Singapore Airlines flies 41 weekly flights into five destinations in the USA via their hub in Singapore. Singapore Airlines and Silk Air fly from 11 cities in India and have 99 weekly flights to Singapore.
- All Nippon Airlines flies 98 weekly flights into nine destinations in the USA from Tokyo (Haneda/Narita airport). It flies 14 weekly flights from Mumbai and New Delhi in India.
- Japan Airlines, Korean Air, Air China, China Southern, and China Eastern Airlines are also rising as important players in the Pacific route.

Key Information

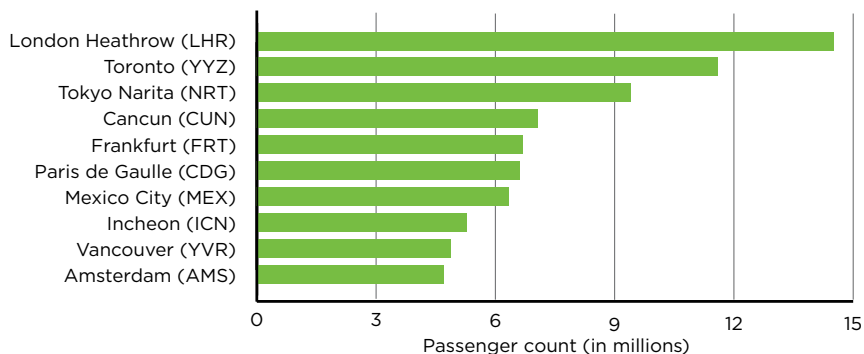
Key Origin Markets in India for the United States

- Delhi
- Bengaluru
- Chennai
- Mumbai
- Hyderabad

Major Gateway Airports in the United States

- New York (JFK)
- Los Angeles (LAX)
- Dallas
- San Francisco (SFO)
- Houston
- Atlanta (ATL)
- Newark (EWR)
- Washington, DC
- Chicago
- Boston (BOS)

Top 10 Foreign Airports (Passenger Traffic to/from USA)



Market Snapshot



The USA ranks among the top destinations for travelers from India who venture outside their country. During 2017, 1.285 million visitors from India arrived in the United States. This was a 6.5 percent increase over the level of visitation in 2016.

Indian Arrivals to the United States

Travelers from India spend more in the United States, compared to other destinations. Overall, 30 percent of all outbound tourism spending by Indians is done in connection with trips to the United States. The level of Indian spending on U.S. trips is five times the amount spent during visits to the second most popular destination, Australia. During 2016, travelers from India spent \$13.6 billion during U.S. visits, which was 14 percent more than the previous year.

Overall, 30 percent of all outbound tourism spending by Indians is done in connection with trips to the United States.

India has a population of 1.3 billion. Over 700 million are under the age of 35.

India's economy is fast-growing. The increasing affluence of India's middle-class population is a driving force. World Bank projections call for India's GDP to increase 7.3 percent from 2018 to 2019. By comparison, the expected rate of growth for China's GDP during the same time period is 6.3 percent.



Profile of the Indian Traveler

Indian travelers are generally well-informed and sophisticated. They tend to look for new destinations and activities, and beyond-the-ordinary experiences that allow them to “live like a local.”

- The United States is the leading aspirational destination for travelers from both metro and non-metro areas, and for those who have never traveled. Australia and New Zealand rank second and third as preferred destinations among travelers in metro locations. *Source: <https://centreforaviation.com/analysis/reports/capa-india-and-expedia-release-the-inflection-point-for-india-outbound-travel-report-397318>*
- Growing affluence has led to an increase in disposable income for middle-class Indians.
- India is the fastest-growing market for the e-commerce sector. Revenue from the sector is expected to increase from \$39 billion in 2017 to \$120 billion in 2020, growing at an annual rate of 51 percent, the highest in the world. *Source: <https://www.ibef.org/industry/ecommerce.aspx>*
- Growth exists in all segments: Free Individual Traveler (FIT), special interest, student travel, and MICE (meetings, incentives, conferences, and exhibitions).
- Major drivers for travelers from India are: sightseeing, entertainment, nightlife, theme parks, family attractions, shopping, adventure and outdoor activities, and culinary.
- Indian millennials tend to be adventurous, confident, and more inclined toward discretionary consumption of activities such as travel, as opposed to savings. They prefer independent travel over group tours, with a focus on entertainment and nightlife. Among 18- to 25-year-olds, 45 percent went on their first international trips with friends or by themselves. *Source: <https://centreforaviation.com/analysis/reports/capa-india-and-expedia-release-the-inflection-point-for-india-outbound-travel-report-397318>*
- A growing preference for customized trips exists, compared to fixed-departure group tours.

Indian travelers tend to look for beyond-the-ordinary experiences that allow them to “live like a local.”

- Consumers view websites and social media as travel influencers during their search for information.
- Travelers from India are willing to extend the duration of their holidays and spend more on their trips. They are also apt to explore locations beyond gateway cities. For instance, they may have interest in traveling through countryside areas to experience local art, culture, and cuisine.
- Travelers from India are stretching out the average length of their holidays when they go to long-haul destinations, especially when they travel with their families. They also tend to return to preferred destinations. And, they favor holidays with multiple destinations. *Source: PATA*

Digital Snapshot

| Social Media Channel | Number of Users (millions) |
|-----------------------------------|----------------------------|
| Active Internet Users | 462 |
| Active Social Media Users | 250 |
| Unique Internet Visitors (mobile) | 844 |
| Active Social Users (mobile) | 230 |

2018 Social Media Snapshot

| Social Media Channel | Number of Users (millions) |
|----------------------|----------------------------|
| Facebook | 250 |
| Instagram | 52 |
| Twitter | 30.4 |
| LinkedIn | 42 |

53 percent of web users ages 18 to 29 have an Instagram account.

Source: Internetworldstats; ITU; Eurostat; CIA World Factbook; Mideastmedia.org; facebook; government officials; regulatory authorities.

Source for social media: Facebook; tencent; similarweb

Other sources: www.statista.com/statistics/309866/india-digital-population/

www.livemint.com/Companies/zAavopmveqtXSXMBAmEG6H/LinkedIns-India-user-base-expands-to-42-million.html

www.hindustantimes.com/tech/mobile-data-traffic-in-india-to-grow-11-times-by-2023-ericsson-report/story-E3CHG6RSO5EKUezf28FanJ.html

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

Brand USA Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, Inc. to conduct proprietary consumer research in various international markets. Respondents were recruited from an online panel. For markets beyond North America, the results reflect responses from adults who travel outside of their continent for leisure. The Global Market Intelligence program is designed to gain insight into travelers' perceptions of the USA and its competitors, as well as general travel behaviors and preferences.

Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=1039).

Base: India Intercontinental travelers.



65%

Beaches/seaside attractions



60%

Shopping



55%

Local lifestyle



53%

Cultural historic attractions



52%

Ecotourism and 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=1039). Base: India Intercontinental travelers.

47%

Open-minded

45%

Friendly

45%

Energetic

44%

Adventurous

41%

Trendy



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: India intercontinental travelers (N=1039).



58%

Websites
via computer



50%

Websites/
applications
via mobile phone



46%

Personal advice
from friends/
family



41%

Online
advertising/email



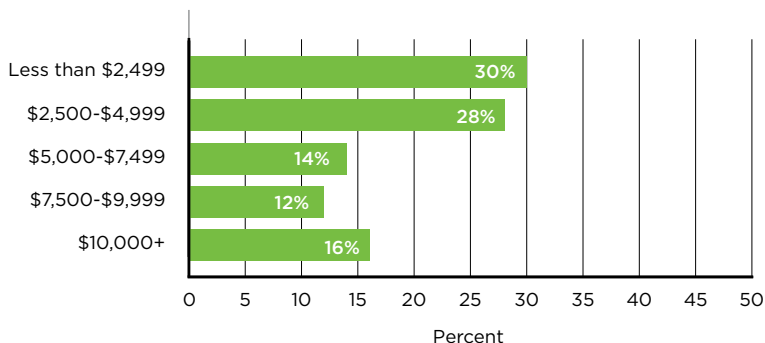
41%

Websites/
applications
via tablet

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.

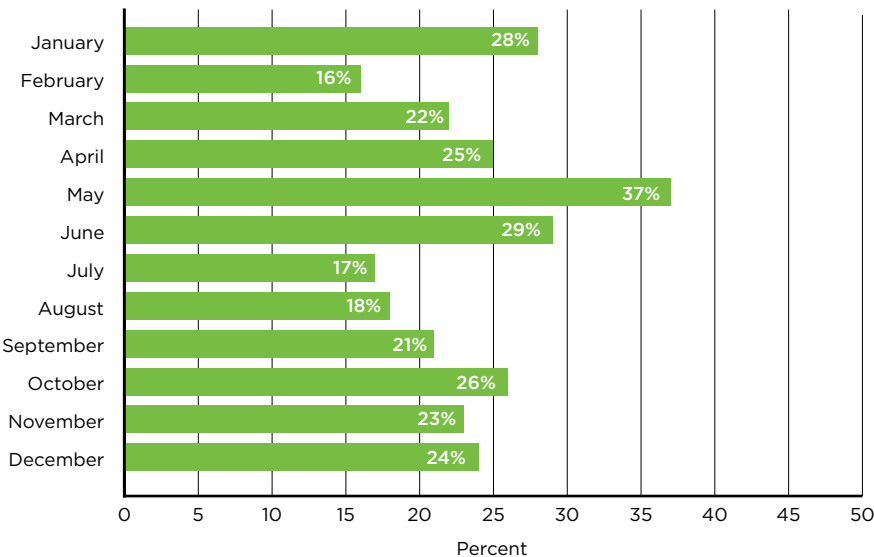
Base: India intercontinental travelers (N=1039). Note: Totals may not add up to 100% due to rounding
(Conversion INR to USD= 0.0152).



Mean: \$6,001 **Median:** \$4,180

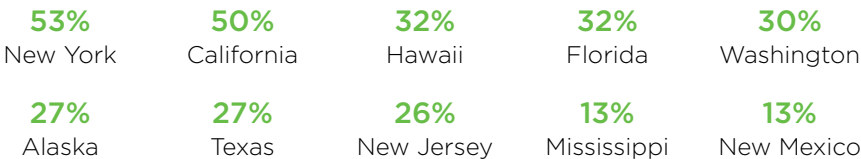
Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: India intercontinental travelers (N=1039).



Destination Interest—Top 10 States

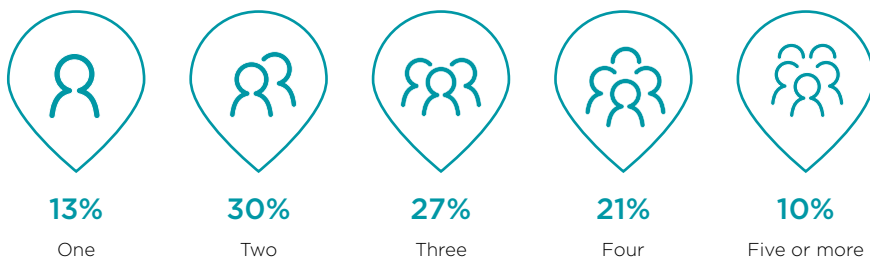
Question: You indicated in a previous question that you have interest in visiting the U.S. sometime in the future. Which U.S. state(s) are you interested in visiting? Base: India intercontinental travelers with interest in visiting the United States (N=1013).





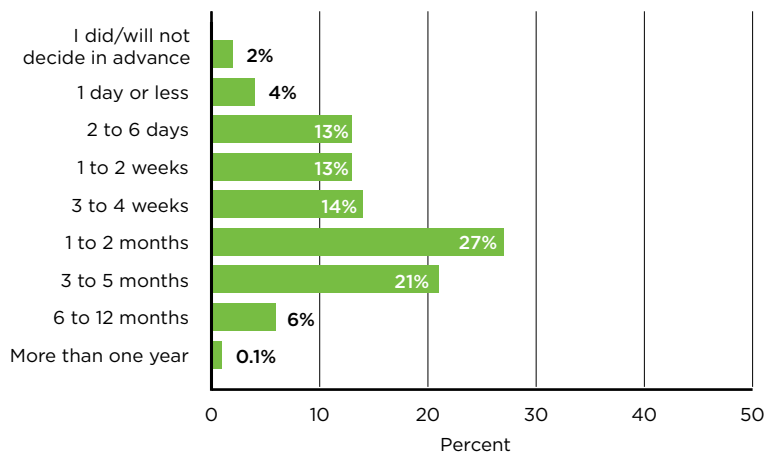
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: India intercontinental travelers (N=1039). Note: Totals may not add up to 100% due to rounding.



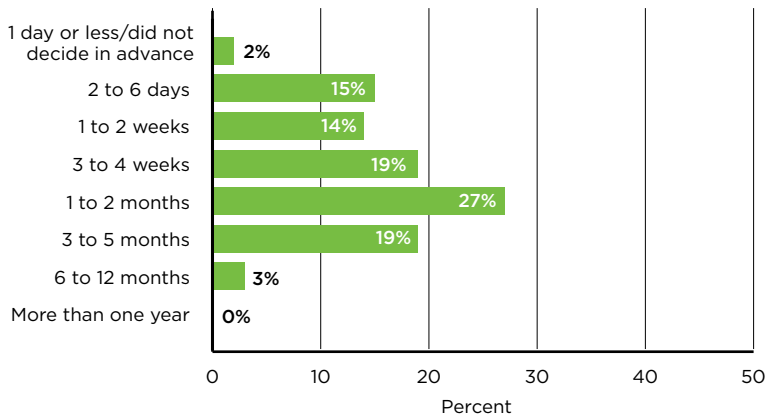
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: India intercontinental travelers (N=1039). Note: Totals may not add up to 100% due to rounding.



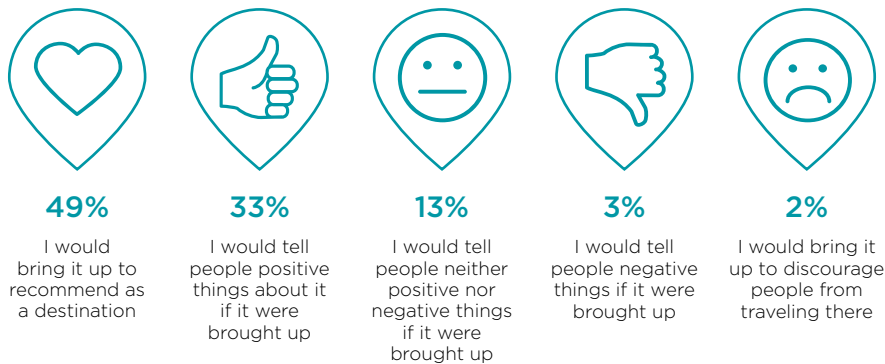
Air Booking for Next International Trip

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: India intercontinental travelers (N=1024). 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: India intercontinental travelers (N=1024). Note: Totals may not add up to 100% due to rounding.

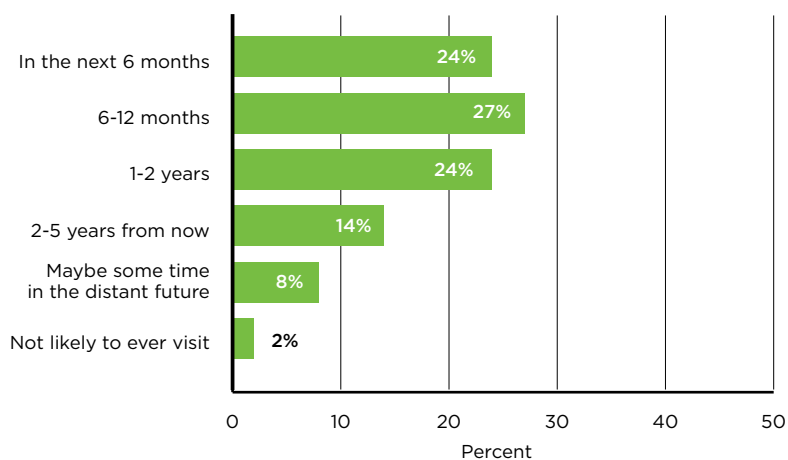


Source: Brand USA Market Intelligence Study 2018



Likelihood of Travel to the USA

Question: When, if ever, are you likely to visit the following countries? Base: India intercontinental travelers (N=1024).



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 Committee, India

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.

Photos: Mumbai (left); Andaman (right)

Source: CIA World Factbook 2018, unless noted otherwise



About the U.S. Department of Commerce

Brand USA works in close concert with the U.S. Department of Commerce through the National Travel and Tourism Office (NTTO) and the U.S. Commercial Service.



The National Travel and Tourism Office (NTTO)

NTTO is the liaison between Brand USA and the federal government. The office works with Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA's annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal agencies.

More broadly, NTTO creates a positive climate for growth in travel and tourism by reducing institutional barriers to tourism, administers joint marketing efforts, provides official travel and tourism statistics, and coordinates efforts across federal agencies through the Tourism Policy Council. The office works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth through:

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;
- Design and administration of export expansion activities;
- Development and management of tourism policy, strategy and advocacy;
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.

Contact:

NTTO

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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 to attract international visitors and to 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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