



Brand USA

Market Information

SOUTH KOREA

2019

About This Guide

This market guide includes a snapshot of the economies in South Korea, 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: Seoraksan National Park, Seoraksan (left); Bukchon Hanok Village, Seoul (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 South Korea's outbound-travel sector.

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

South Korea, in recent years, has been one of the highest-performing markets for international travelers coming to the United States. More than 2.3 million South Koreans visited the USA during 2017—an increase of 17 percent over the preceding year. This increase moved South Korea up to the sixth-largest source market for international arrivals in the United States. South Korean visitors to the USA also spent \$10.1 billion during their 2017 U.S. trips, ranking them as eighth in the top 10 groups of international visitors.

The USA continues to be among the most popular long-haul destinations for South Koreans, a group of travelers who tend to be younger and quicker to make travel decisions, compared to other international travelers. They are increasingly interested in free independent travel (FIT) and moving away from group package tours.

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 South Korea 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.



- Last year we premiered the new 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 streaming services that offer video-on-demand. The expanding development of GoUSA TV aligns well with the South Korean market, where the population is highly connected. South Korea is expected to have 10.2 million households with subscription video-on-demand by 2020. In the Asia-Pacific region, only Japan and China will have a higher number.
- Our newest campaign, *United Stories*, features a mobile content creation lab traveling across the United States and capturing warm and welcoming stories told from local perspectives. A variety of accomplished content creators, storytellers, and influencers will bring international travelers on a journey through memorable narratives that reveal the warmth of the American people and show the many adventures across the USA that are just one road trip away.
- Brand USA South Korea has launched a fourth USA Specialist program to familiarize South Korean travel agents with the diverse range of travel experiences across the United States. And, later this year, we are launching a Korean language USA Discovery Program.

I encourage you to talk to our team about destinations in the USA, the opportunities we offer to enhance your marketing efforts in South Korea and the most effective ways to inspire the South Korean travelers 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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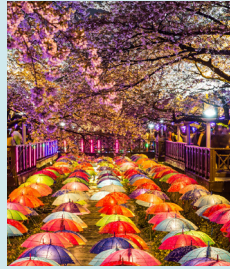
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Market Facts



Geography

Area

99,720 km²

Largest Cities

Seoul (Capital):

9.963 million

Busan: 3.467 million

Largest Metropolitan Areas



Photos: Busan (left); Gyeongbokgung Palace, Seoul City (right)

Source: CIA World Factbook 2018

Climate

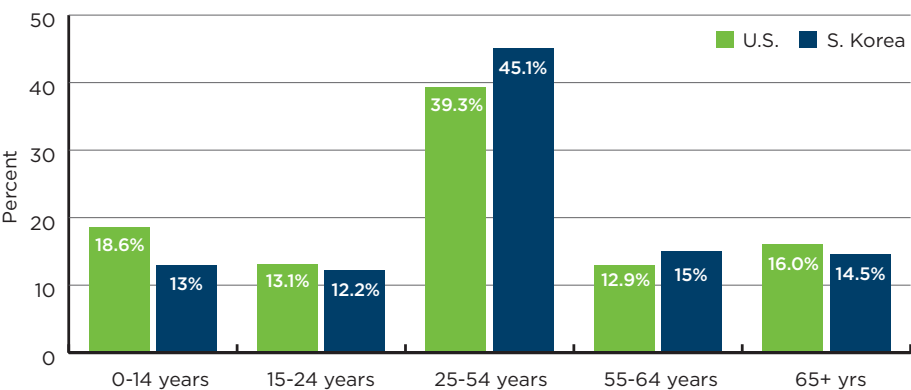
The Republic of Korea lies in the temperate zone with four distinct seasons. Due to its geographical location, it shows complex climate characteristics that reveal both continental and oceanic features. In Seoul, the average January temperature range is -7°C to 1°C (19°F to 33°F), and the average July temperature range is 22°C to 29°C (71°F to 83°F).

Demographics

Population

	South Korea	USA
Population size	51,418,097	329,256,465
Median age	42.3 years	37.8 years
Population growth rate (2015 est.)	0.44%	0.78%

Population by Age



Source: CIA World Factbook 2018



Economy

- **GDP:** \$2.035 trillion (2017 est.)
- **GDP real growth rate:** 3.1% (2017 est.)
- **GDP—per capita:** \$39,500 (2017 est.)
- **Unemployment rate:** 3.7% (2017 est.)
- **Inflation rate:** 1.9% (2017 est.)

Vacation Allocation

South Korea has 11 legal public holidays in a year. Most businesses are closed and people are on vacation during the holidays.

Public Holidays

- **New Year's Day:** January 1
- **Lunar New Year:** January 1 of the lunar calendar
- **Independence Movement Day:** March 1
- **Children's Day:** May 1
- **Buddha's Birthday:** April 8 of the lunar calendar
- **Memorial Day:** June 6
- **National Liberation Day:** August 15
- **Korean Thanksgiving Day:** April 8 of the lunar calendar
- **National Foundation Day:** June 6
- **National Liberation Day:** August 15
- **Korean Thanksgiving Day:** April 8 of the lunar calendar
- **National Foundation Day:** October 3
- **Hangul Proclamation Day:** October 9
- **Christmas Day:** December 25

Primary Travel Periods

- Traditionally, the peak season for Korean outbound travel is the summer holiday period, which runs from July to August. Also considered a peak season is December to February, the winter break coinciding with school holidays. However, the gaps between peak and shoulder seasons are getting smaller, and more Koreans are traveling year-round.
- Lunar New Year and Chuseok holidays are often considered high seasons, as many Koreans use these holidays to travel overseas. Both of these national holidays usually last for three days.
- In 2017, the highest number of Koreans traveled to the USA during September (222,020 pax), followed by July (221,978 pax), December (213,347 pax), January (207,539 pax), and October (205,993 pax).

Travel Trends

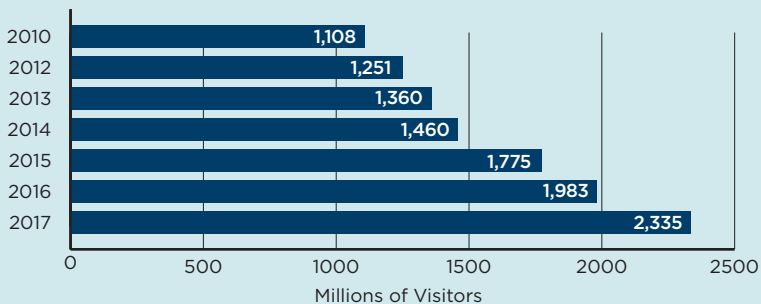


International Travel Trends

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

	2005	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	\$3,545	\$5,788	\$6,048	\$7,108	\$7,396	\$8,357	\$8,917	\$10,145
Change (%) in Total Exports	19	25	0	18	4	13	75	14

Visitation Trends: Arrivals

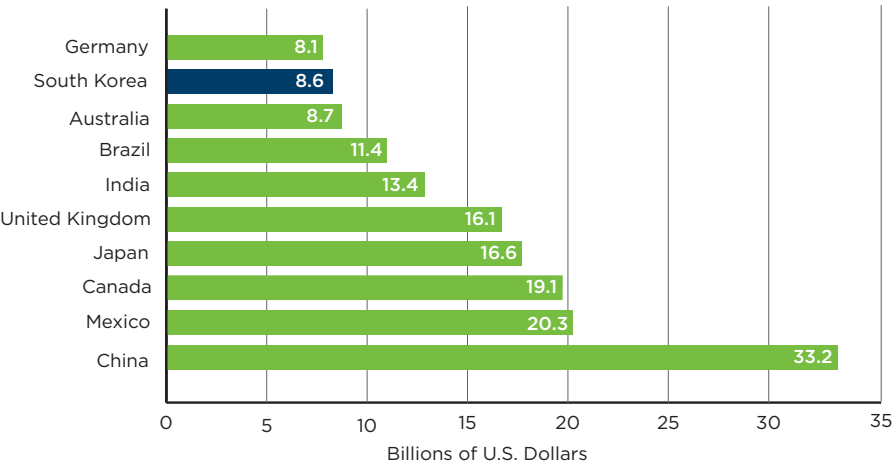


Photos: Hanok Village, Seoul (left), Statue of Sejong the Great, Gwanghwamun Plaza (right)

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

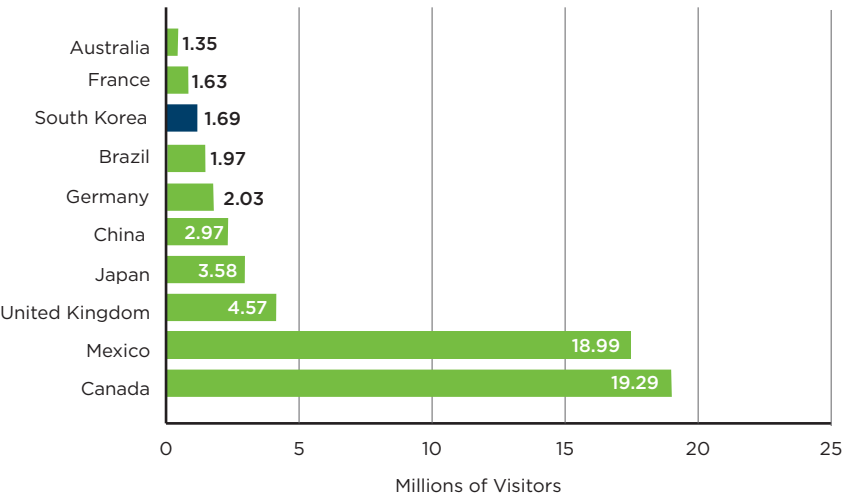
Inbound Travel Trends

Visitor Spending



International Arrivals to the USA

Top 10 Countries Generating Travel to the United States (Long-haul arrivals)



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



Traveler Characteristics

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	67	67
Visit Friends/Relatives	12	12
Business	9	9
Convention/Conference/Trade Show	6	7
Education	5	6
Health Treatment	0.0	0.1
Religion/Pilgrimages	0.5	0.1

All Purposes of Trip

All Purposes of Trip	2016 (%)	2017 (%)
Vacation/Holiday	74	73
Visit Friends/Relatives	21	20
Business	11	11
Convention/Conference/Trade Show	8	8
Education	7	7
Religion/Pilgrimages	1	0.4
Health Treatment	0.1	0.4
Other	0.1	0.5
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	83	83
Business & Convention	17	17

Select Traveler Characteristics

Traveler Characteristics	2016 (%)	2017 (%)
Length of Stay in U.S. (Mean Nights)	13.4	15
Length of Stay in U.S. (Median Nights)	6	5
First International Trip to the USA	48	46

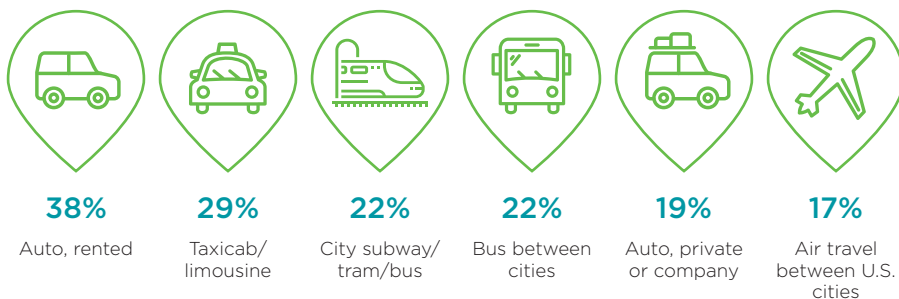
USA Destinations Visited (States, Cities, and Regions)

U.S. Destinations/Regions	2016 (%)	2017 (%)
REGIONS		
Pacific Islands	45.83	47.23
Pacific	27.14	26.46
Middle Atlantic	20.05	18.38
Mountain	14.55	NA
South Atlantic	10.32	9.92
STATES/TERRITORIES		
Guam	30.14	33.03
California	25.14	23.94
New York	18.37	17.13
Hawaii	15.43	14.20
Nevada	12.42	NA
CITIES		
New York City	17.99	16.59
Los Angeles	17.52	13.88
Honolulu & Oahu	12.85	12.58

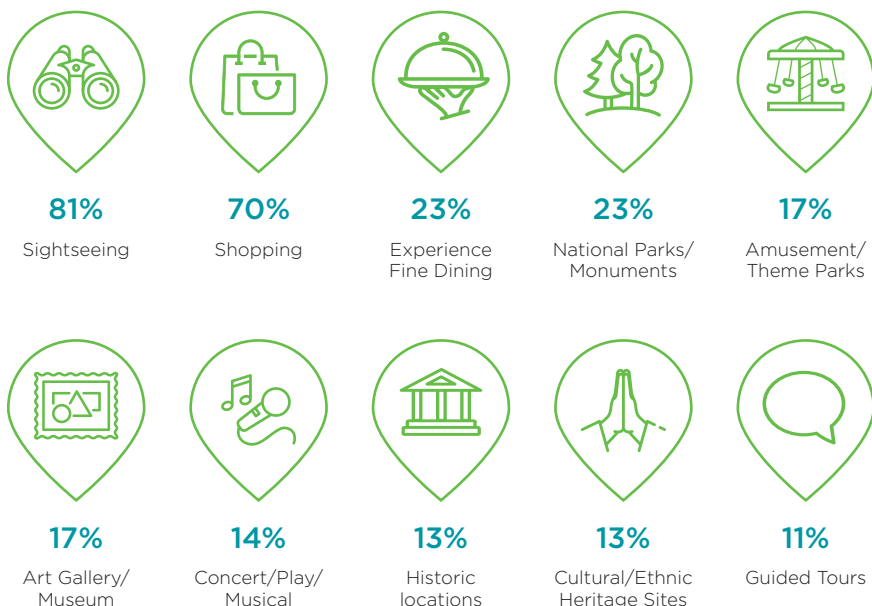
Source: U.S. Department of Commerce, National Travel and Tourism Office



Transportation Used in the USA



Activity Participation While in the USA



Air Travel Information



Non-Stop Flights from South Korea to the USA

Route	Airline	Frequency
Los Angeles	Korean Air	2 Daily
Los Angeles	Asiana Airlines	2 Daily
Los Angeles	NH	Daily
San Francisco	Korean Air	2 Daily
San Francisco	Asiana Airlines	Daily
San Francisco	United Airlines	Daily
San Francisco	AA	Daily
Seattle	Korean Air	6 Weekly
Seattle	Asiana Airlines	5 Weekly
Seattle	Delta Air Lines	Daily
Chicago	Korean Air	Daily
Chicago	Asiana Airlines	5 Weekly
New York City	Korean Air	2 Daily
New York City	Asiana Airlines	Daily
Atlanta	Korean Air	Daily
Atlanta	Delta Air Lines	Daily
Dallas	Korean Air	4 Weekly
Dallas	American Airlines	Daily
Washington, DC	Korean Air	Daily
Las Vegas	Korean Air	5 Weekly
Detroit	Delta Airlines	Daily

Photos: Bukchon Hanok Village (left); Central Park at Songdo, Incheon (right)

Source: Brand USA Proprietary Research; Remark: Delta Air Lines launched a new Incheon to Minneapolis flight on April 2, 2019. Korean Air launched a new Incheon to Boston flight on April 12, 2019. In April 2019, United Airlines added 4 additional flights from Incheon to San Francisco.



Route	Airline	Frequency
Honolulu	Korean Air	Daily
Honolulu	Asiana Airlines	5 Weekly
Honolulu	Hawaiian Airlines	5 Weekly
Honolulu	Jin Air	5 Weekly
Honolulu	Korean Air	2 Daily
Guam	Jeju Air (LCC)	3 Daily
Guam	Jin Air (LCC)	3 Daily
Guam	T-way (LCC)	2 Daily
Guam	Air Seoul (LCC)	Daily
Guam	Air Busan (LCC)	4 Weekly
Saipan	Asiana Airlines	Daily
Saipan	Jeju Air (LCC)	3 Daily
Saipan	T-way (LCC)	Daily

Market Snapshot



Sales Distribution

- A Korea National Tourism Survey revealed that “seeing natural scenery” (23.4 percent) was the main reason for Koreans to escape from city life. “Gourmet tours” (16.7 percent) have become another industry trend, allowing travelers to experience distinctive, local food.
- In 2017, the most popular resources for Korean travelers to obtain travel-related information were portal sites (79.7 percent), followed by travel-agent websites (9.6 percent) and SNS (7.5 percent).
- The top 10 travel agencies accounted for more than 60 percent of all air-ticket sales, according to a report by the Bank Settlement Plan. Hana Tour, Mode Tour, Interpark Tour, Yellow Balloon Tour, and Online Tour are among the leading producers.
- Korean travel agents are rapidly shifting their focus from group package tours to FIT travel. With the exploding use of the internet in Korea and the adoption of a five-day work week, more Koreans are booking FIT tours, such as Airtel (air + hotel) packages, and developing their own itineraries with preferred activities. Also, a greater number of agencies are

Overseas spending by Korean travelers continues on an upward swing, according to Korea’s National Assembly Budget Office. In 2017, Koreans spent a record-level \$28.5 billion, which was 14.3 percent more than 2016.



moving toward developing flexible tour packages that combine group tour and FIT components, such as free, one- to two-day itineraries during group tours, or a guided tour during FIT tours.

- Nearly 26.5 million Koreans traveled overseas during 2017. This was an 18.4 percent increase over the previous year.
- OTAs like WAUG, KLOOK, and My Real Trip, which are handling single products such as ticket and pass, are growing in the Korean market.

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: Hwaseong Fortress, Seoul (left); Gamcheon Culture Village, Busan (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	fr:VisitTheUSA.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>		
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSACo  YouTube.com/VisitTheUSAes	#VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	 @VisitTheUSAFr  @VisitTheUSA	 facebook.com/VisitTheUSAFr  YouTube.com/VisitTheUSAFr	#VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSADe  YouTube.com/VisitTheUSADe	#VisitTheUSA
India	GoUSA.in	Plan Your USA Trip Now	 @GoUSAin  @VisitTheUSA	 facebook.com/GoUSAin  YouTube.com/GoUSAin	#USATrip
Japan	GoUSA.jp	今すぐ USAへの 旅の 計画を	 @GoUSAjp  @VisitTheUSA	 facebook.com/GoUSAjp  YouTube.com/GoUSAjp	アメリカ旅行
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSAmx  YouTube.com/VisitTheUSAes	#VisitTheUSA
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	 @GoUSAkr  @VisitTheUSA	 facebook.com/GoUSAkr  YouTube.com/GoUSAkr	#미국여행
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSAse  YouTube.com/VisitTheUSA	#VisitTheUSA
Taiwan	GoUSA.tw	n/a	n/a	 facebook.com/GoUSA.official	n/a
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	 @VisitTheUSAuk  @VisitTheUSA	 facebook.com/VisitTheUSAuk  YouTube.com/VisitTheUSA	#VisitTheUSA



Brand USA Traveler Research

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

Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=999).

Base: South Korea Intercontinental travelers.



62%

Cultural/historic attractions



56%

Beaches/seaside attractions



41%

Ecotourism and nature



33%

Urban attractions



31%

Dining/gastronomy

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=999). Base: South Korea Intercontinental travelers.

52%

Open-minded

50%

Diverse

44%

Energetic

27%

Down-to-earth

26%

Sophisticated

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: South Korea Intercontinental travelers (N=999).



62%

Websites
via computer



38%

Information in
printed travel
guidebooks



31%

Websites/
applications
via tablet



28%

Personal advice
from travel
professionals/
travel agents

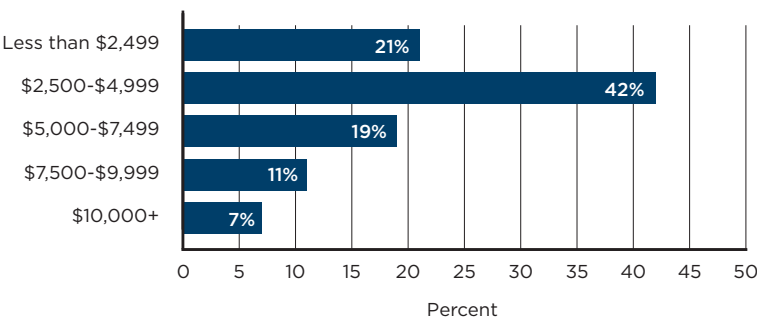


28%

Websites/
applications
via mobile phone

Expected Household Travel Spend for Next Intercontinental Trip

Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: South Korea Intercontinental travelers (N=999). Note: Totals may not add up to 100% due to rounding (Conversion KRW to USD=0.00086).

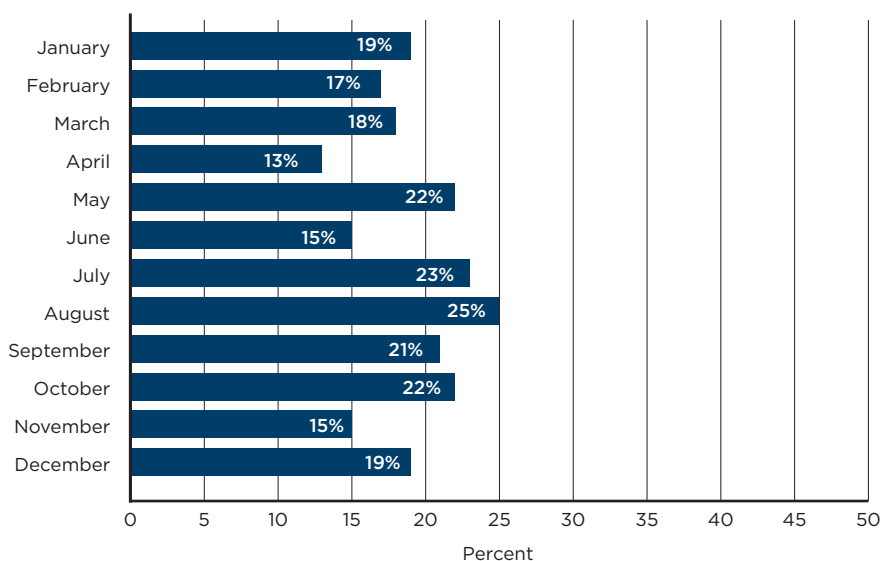


Mean: \$5,090 **Median:** \$4,253



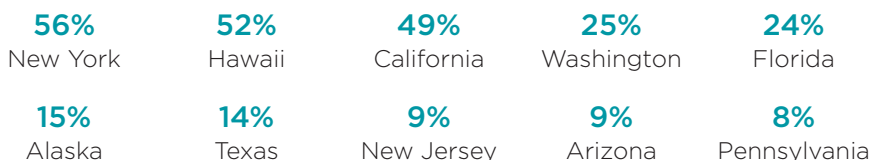
Months Traveled (March 2016–2018)

Question: During what month(s) did you take your holiday(s)? Base: South Korea Intercontinental travelers 2017 (N=999).



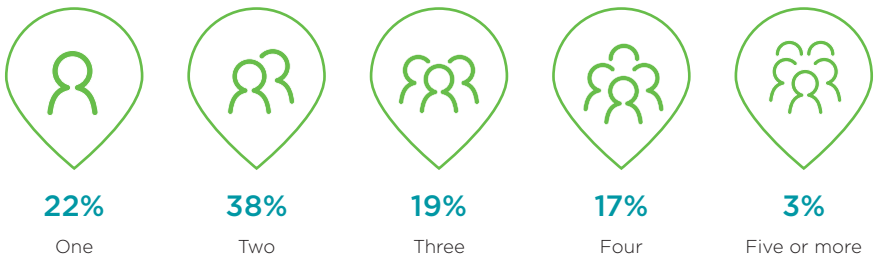
Destination Interest—Top 10 States

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: South Korea Intercontinental travelers with interest in visiting the United States (N=981).



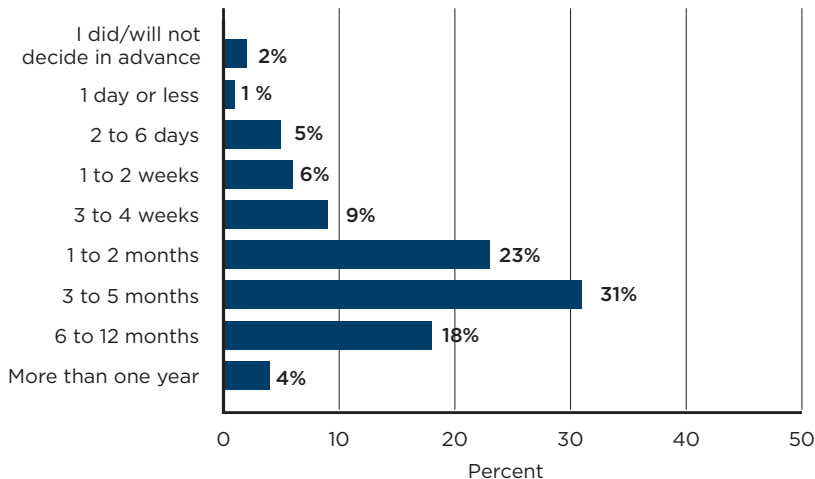
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: South Korea Intercontinental travelers 2017 (N=999). Note: Totals may not add up to 100% due to rounding.



Destination Decision for Next International Trip

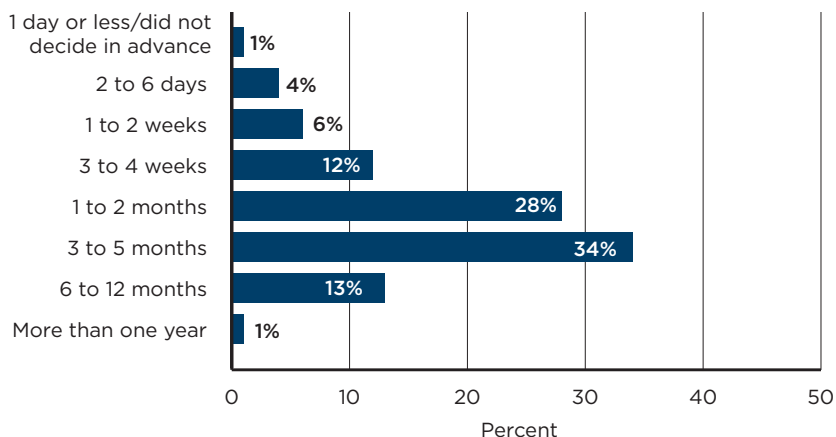
Question: How far in advance of your departure date did/will you decide on the destination? Base: South Korea Intercontinental travelers 2017 (N=999). Note: Totals may not add up to 100% due to rounding.





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: South Korea Intercontinental travelers 2017 (N=999). 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: South Korea Intercontinental travelers (N=999). Note: Totals may not add up to 100% due to rounding.



38%

I would bring it up to recommend as a destination



33%

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



17%

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



3%

I would tell people negative things if it were brought up

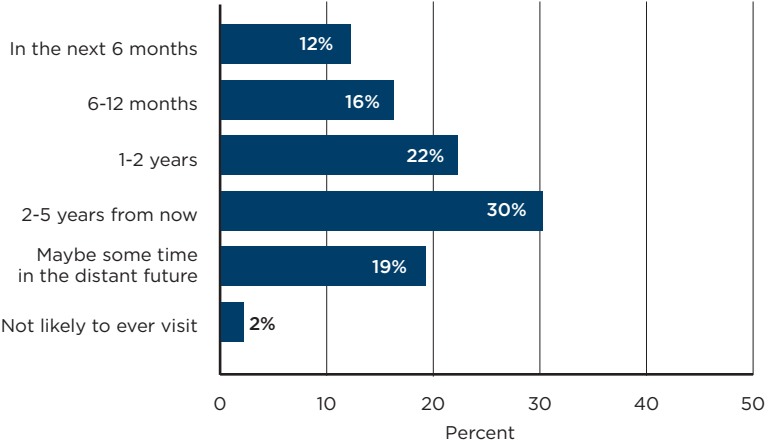


1%

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: South Korea Intercontinental travelers 2017 (N=999).





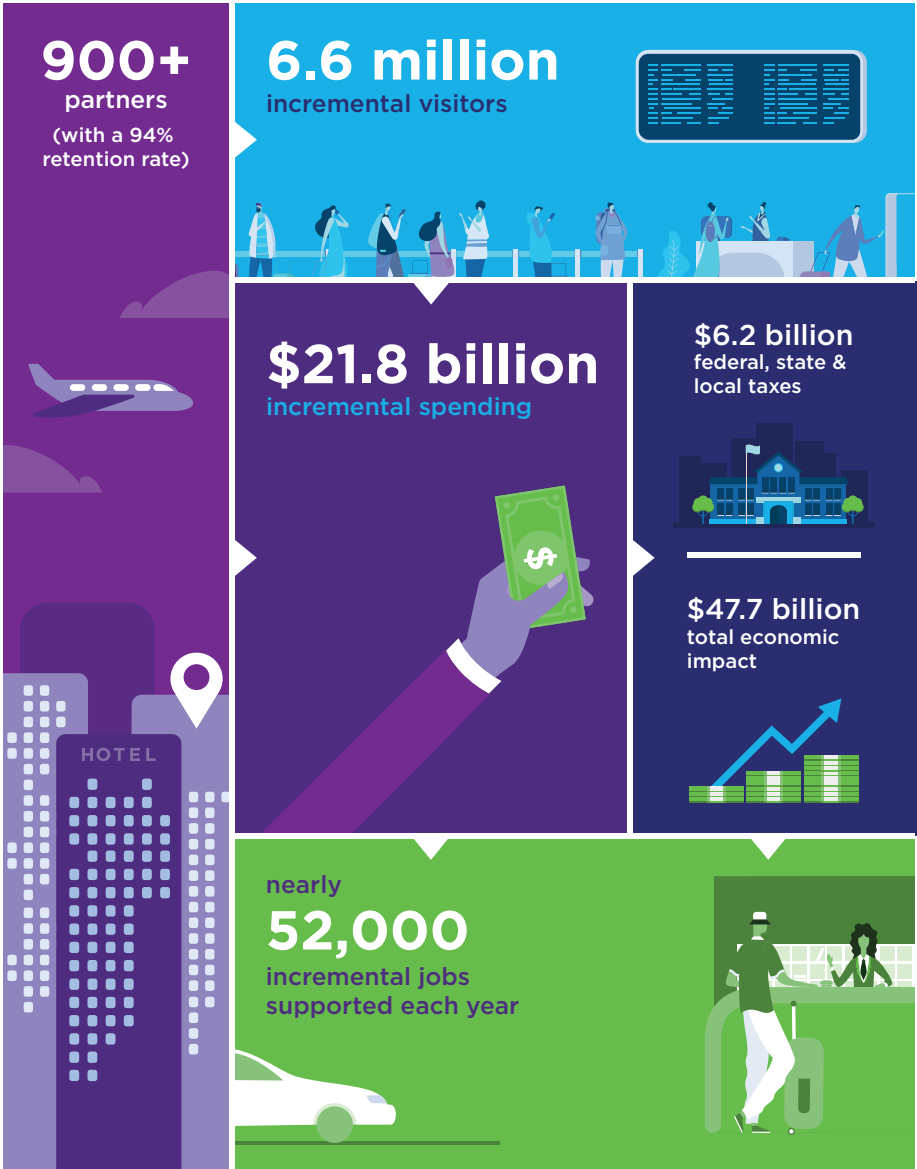
Highlights of Success

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

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

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

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





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

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

Brand USA Markets

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

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

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

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

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

Brand USA Partnerships



About the U.S. Department of Commerce

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



The National Travel and Tourism Office (NTTO)

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

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

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;

Photos: Hanbok traditional Korean garment, Seoul. (left); Haedong Yonggungsa Temple, Busan (right)
Source: CIA World Factbook 2018, unless noted otherwise

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- Design and administration of export expansion activities;
 - Development and management of tourism policy, strategy and advocacy;
 - Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.

Contact:

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The U.S. Commercial Service

Brand USA works closely with the U.S. Commercial Service (USCS) to pursue our mutual objective of promoting the United States as the premier international travel destination.



The USCS is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration. The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States. As America's largest services export, travel and tourism is a key sector for the USCS.

The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers 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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