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Brand USA

Market
Information

UNITED KINGDOM
& IRELAND

2019

About This Guide

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

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: Cambridge, England (left); Donegal, Ireland (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 the United Kingdom and Ireland.

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

The United Kingdom and Ireland represent a significant international market for inbound tourism to the United States. Nearly 4.5 million travelers from the U.K. came to the United States during 2017, with nearly 485,000 coming from Ireland. Only Canada and Mexico provided more U.S. visitors. Those who came from the U.K. in 2017 spent $15.6 billion during their U.S. trips.

Recent research among United Kingdom travelers showed 75 percent of those surveyed plan to make a trip to the USA in the next five years, 37 percent would recommend the USA as a travel destination, and 31 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 provides travelers from the UK and Ireland the unique opportunity to see the unique aspects of the United States and further encourages them to visit the USA.

Our initiatives include:

- Showcasing destinations through our expanded travel-entertainment TV channel, GoUSA TV, which is available around the globe on Roku, Apple TV, and Amazon Fire TV, and coming soon to Google Chromecast. The channel offers an assortment of travel experiences across four different categories: the great outdoors, road trips, food and drink, and culture and events. Programming on GoUSA TV will expand to feature additional themes and formats, including series, films, videos, and live videos.

- 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 streaming services that offer video-on-demand.

- Our newest campaign, *United Stories*, features a mobile content creation lab traveling across the United States and capturing warm and welcoming stories told from local perspectives. A variety of accomplished content creators, storytellers, and influencers will bring international travelers on a journey through memorable narratives that reveal the warmth of the American people and show the many adventures across the USA that are just one road trip away.

- We participate in the World Travel Market in London, a three-day exhibition allowing 50,000 travel-industry and media professionals to meet with travel/tourism suppliers.

- This year, we kickoff the inaugural Brand USA Travel Week in London, which will combine an exclusive series of B2B meetings, educational opportunities, and consumer activations. Brand USA Travel Week will allow U.S. destinations to highlight the best their cities, towns, and states have to offer in an engaging, unique, and interactive environment.

I encourage you to talk to our team about destinations in the USA, the opportunities we offer to enhance your marketing efforts in the United Kingdom and Ireland, and find 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!

Christopher L. Thompson

President & CEO
Brand USA

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Market Facts

Geography

Area

United Kingdom

243,610 km^2

Ireland

70,273 km^2

Largest Metropolitan Areas

UNITED KINGDOM

Northern Ireland
1.8 million

Scotland
5.4 million

Dublin

IRELAND
5.0 million

England
55.2 million

Wales
3.1 million

London

Photos: Brighton, England (left); Isle of Skye, Scotland (right)
Source: CIA World Factbook 2018

Climate

United Kingdom

The United Kingdom has a temperate climate, moderated by prevailing southwest winds over the North Atlantic Current. More than half of the days through the year are overcast.

Ireland

Ireland has a temperate maritime climate with mild winters and cool summers. The days are also overcast half of the time.

Demographics

Population

United Kingdom

65,105,246

Ireland

5,068,050

Major Urban Areas

United Kingdom

- **London (capital):** 9.046 million
- **Manchester:** 2.69 million
- **Birmingham:** 2.57 million
- **West Yorkshire:** 1.864 million
- **Glasgow:** 1.661 million
- **Southampton/Portsmouth:** 912,000

Ireland

- **Dublin (capital):** 1.201 million

Population by Age

Chart: Population by Age (Percent) — U.S., United Kingdom, Ireland

Age group	U.S.	United Kingdom	Ireland
0-14 years	19%	18%	21%
15-24 years	13%	12%	12%
25-54 years	39%	40%	43%
55-64 years	13%	12%	11%
65+ yrs	16%	18%	13%

Economy

- **GDP:** $2.93 trillion / $353.3 billion
- **GDP Real Growth Rate:** 1.7% / 7.2%
- **GDP—Per Capita:** $44,300 / $73,200
- **Unemployment Rate:** 4.4% / 6.7%
- **Inflation Rate:** 2.7% / 0.3%

United Kingdom / Ireland; 2017 est.

Source: CIA World Factbook 2018

Vacation Allocation and Public Holidays

England, Wales and Scotland

Almost all workers are legally entitled to five to six weeks of paid-holiday each year. An employer can include bank holidays as part of statutory annual leave.

2019		
1 January	Tuesday	New Year's Day (substitute day)
2 January	Wednesday	2nd January (Scotland only) (substitute day)
19 April	Friday	Good Friday
22 April	Monday	Easter Monday (England and Wales only)
6 May	Monday	Early May bank holiday
27 May	Monday	Spring bank holiday
05 August	Monday	Summer bank holiday (Scotland only)
26 August	Monday	Summer bank holiday (England and Wales only)
02 December	Monday	St Andrew's Day (Scotland only)
25 December	Wednesday	Christmas Day
26 December	Thursday	Boxing Day

Northern Ireland and Republic of Ireland

Nearly all workers are legally entitled to four weeks of paid-holiday yearly.

2019		
1 January	Tuesday	New Year's Day (substitute day)
17 March	Sunday	St. Patrick's Day (Republic of Ireland)
18 March	Monday	St. Patrick's Day (substitute day) (Northern Ireland)
19 April	Friday	Good Friday (Northern Ireland only)
22 April	Monday	Easter Monday
6 May	Monday	Early May bank holiday
27 May	Monday	Spring bank holiday (Northern Ireland only)
3 June	Monday	June bank holiday (Republic of Ireland)

Source: CIA World Factbook 2018

12 July	Friday	Battle of Boyne (Orangemen's Day) (Northern Ireland only)
5 August	Monday	August bank holiday (Republic of Ireland)
26 August	Monday	Summer bank holiday (Northern Ireland only)
28 October	Monday	October bank holiday (Republic of Ireland)
25 December	Tuesday	Christmas Day
26 December	Wednesday	St. Stephen's Day (Republic of Ireland) / Boxing Day (Northern Ireland)

Primary Travel Periods

- **February:** School break
- **April:** Easter
- **Summer Holidays:** Six weeks in July/August; school starts in early September
- **October:** School break
- **Winter Holidays/Christmas**

Public School Holidays

Schools are generally broken up in terms, having six terms per year:

- **Term 1:** Early September–late October
- **Term 2:** Early November–late December
- **Term 3:** Early January–mid February
- **Term 4:** Late February–late March/early April
- **Term 5:** Mid April–late May
- **Term 6:** Early June–late July

Students receive a few days off between each term. Families often plan travel during those times.

Travel Trends

International Travel Trends: United Kingdom

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

	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	$12,279	$13,281	$13,462	$14,762	$16,961	$15,962	$15,597
Travel Receipts	$9,595	$10,118	$10,177	$11,119	$13,427	$12,808	$12,373
Passenger Fare Receipts	$2,684	$3,163	$3,285	$3,643	$3,534	$3,154	$3,224
Change (%) in Total Exports	6	2	1	10	15	-6	-2

Visitation Trends: Arrivals

Year	Number of Arrivals (000)
2010	3,851
2012	3,763
2013	3,835
2014	4,149
2015	4,915
2016	4,587
2017	4,483

Photos: Glasgow, Scotland (left), Oxford, England (right)
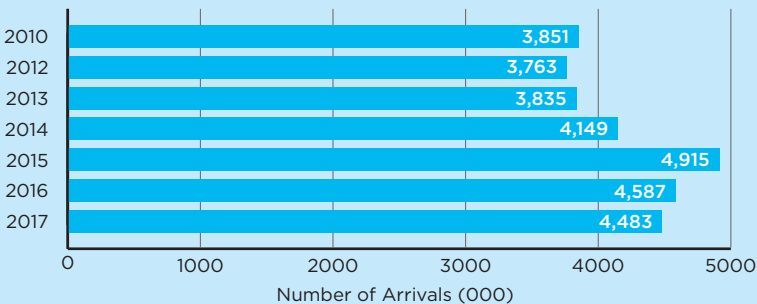*Source: U.S. Department of Commerce, National Travel and Tourism Office*

International Travel Trends: Ireland

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

	2010	2012	2013	2014	2015	2016	2017
Total Travel & Tourism Exports	$1,275	$1,363	$1,464	$1,667	$1,851	$1,838	$1,974
Travel Receipts	$1,031	$1,111	$1,180	$1,316	$1,501	$1,541	$1,671
Passenger Fare Receipts	$244	$252	$284	$351	$350	$297	$303
Change (%) in Total Exports	-12	0	7	14	11	-1	7

Visitation Trends: Arrivals

Number of Arrivals (000)

Year	Arrivals
2010	360
2012	332
2013	367
2014	400
2015	451
2016	443
2017	484

Inbound Travel Trends: United Kingdom

Visitor Spending

Country	Billions of U.S. Dollars
Germany	8.1
South Korea	8.6
Australia	8.7
Brazil	11.4
India	13.4
United Kingdom	16.1
Japan	16.6
Canada	19.1
Mexico	20.3
China	33.2

Billions of U.S. Dollars

International Arrivals to the USA

Top 10 Countries Generating Travel to the United States (Long-Haul Arrivals)

Country	Millions of Visitors
Australia	1.35
France	1.63
South Korea	1.69
Brazil	1.97
Germany	2.03
China	2.97
Japan	3.58
United Kingdom	4.57
Mexico	18.99
Canada	19.29

Millions of Visitors

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

Traveler Characteristics: United Kingdom

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Business	9.3	8.3
Convention/Conference/Trade Show	4.4	4.9
Education	1.4	1.5
Health Treatment	0.2	0.2
Vacation/Holiday	66.8	66.2
Visit Friends/Relatives	17.6	18.5
Religion/Pilgrimages	0.0	0.2
Other	0.1	0.2

All Purposes of Trip

All Purposes of Trip	2016 (%)	2017 (%)
Business	11.0	10.2
Convention/Conference/Trade Show	6.0	6.2
Education	2.6	2.5
Health Treatment	0.4	0.4
Vacation/Holiday	75.0	75.4
Visit Friends/Relatives	27.0	27.5
Religion/Pilgrimages	0.3	0.8
Other	0.2	0.4
NET PURPOSES OF TRIP		
Business & Convention	15.5	15.2
Leisure & Visit Friends and Relatives	87.2	87.7

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)	14.4	12.8
Length of Stay in USA (Median Nights)	10	10
First International Trip to the USA	15.0%	15.1%

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

U.S. Destinations/Regions	2016 (%)	2017 (%)
REGIONS		
South Atlantic	39.11	38.34
Middle Atlantic	31.43	29.03
Pacific	18.56	18.26
Mountain	15.21	14.06
New England	5.84	6.51
West South Central	5.88	5.97
East North Central	5.38	5.14
East South Central	2.42	2.07
West North Central	1.98	–
STATES/TERRITORIES		
Florida	31.28	30.21
New York	29.06	26.50
California	17.42	16.31
Nevada	12.04	10.95
CITIES		
New York City	28.69	26.02
Orlando	20.92	22.47
Las Vegas	11.95	10.85

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

Transportation Used in the USA

37%
Taxicab/
Limousine

31%
City subway/
Tram/Bus

31%
Auto, private
or company

31%
Auto, rented

22%
Air travel
between U.S.
cities

11%
Bus between
cities

Activity Participation While in the USA

86%
Shopping

83%
Sightseeing

40%
National Parks/
Monuments

30%
Historic
Locations

30%
Small Towns/
Countryside

30%
Experience
Fine Dining

30%
Guided Tours

29%
Amusement/
Theme Parks

28%
Art Gallery/
Museum

19%
Concert/Play/
Musical

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

Traveler Characteristics: Ireland

Main Purpose of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Business	11.6	9.1
Convention/Conference/Trade Show	4.3	3.5
Education	0.8	1.4
Health Treatment	0.1	0.1
Vacation/Holiday	59.9	61.9
Visit Friends/Relatives	23.0	23.9
Religion/Pilgrimages	0.2	0.1
Other	0.3	0.0

All Purposes of Trip

All Purposes of Trip	2016 (%)	2017 (%)
Business	13.2	10.7
Convention/Conference/Trade Show	6.5	5.1
Education	1.2	1.8
Health Treatment	0.1	0.1
Vacation/Holiday	70.1	73.8
Visit Friends/Relatives	37.1	34.2
Religion/Pilgrimages	0.2	0.1
Other	0.2	0.0
NET PURPOSES OF TRIP		
Business & Convention	17.6	14.9
Leisure & Visit Friends and Relatives	85.6	88.8

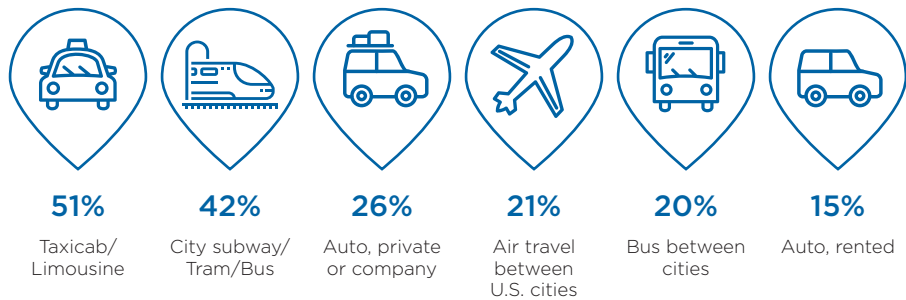*Source: U.S. Department of Commerce, National Travel and Tourism Office*

Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in U.S. (mean nights)	12.4	11.5
Length of Stay in U.S. (median nights)	8	7
First International Trip to the U.S. (%)	17.7	14.9

USA Destinations Visited (States, Cities, and Regions)

U.S. Destinations/Regions	2016 (%)	2017 (%)
REGIONS		
Middle Atlantic	44.71	45.88
South Atlantic	23.84	–
Pacific	16.06	16.99
STATES/TERRITORIES		
New York	41.12	43.81
California	14.88	16.00
CITIES		
New York City	40.89	42.88

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

Transportation Used in the USA

51%
Taxicab/
Limousine

42%
City subway/
Tram/Bus

26%
Auto, private
or company

21%
Air travel
between
U.S. cities

20%
Bus between
cities

15%
Auto, rented

Activity Participation While in the USA

87%
Shopping

82%
Sightseeing

42%
National parks/
Monuments

30%
Guided tours

29%
Art gallery/
Museum

29%
Experience
fine dining

27%
Concert/Play/
Musical

25%
Small towns/
Countryside

22%
Nightclubbing/
Dancing

22%
Historic
locations

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

Air Travel Information

✈

Non-Stop Flights from the United Kingdom & Ireland to the USA

Airline name	Flights to	Code	Flights from	Code
Aer Lingus	Boston	BOS	Dublin	DUB
Aer Lingus	Boston	BOS	Shannon	SNN
Aer Lingus	Chicago O'Hare	ORD	Dublin	DUB
Aer Lingus	Hartford, CT	BDL	Dublin	DUB
Aer Lingus	Los Angeles	LAX	Dublin	DUB
Aer Lingus	Miami	MIA	Dublin	DUB
Aer Lingus	Minneapolis	MSP	Dublin	DUB
Aer Lingus	New York (JFK)	JFK	Dublin	DUB
Aer Lingus	New York (JFK)	JFK	Shannon	SNN
Aer Lingus	Newark	EWR	Dublin	DUB
Aer Lingus	Orlando International	MCO	Dublin	DUB
Aer Lingus	San Francisco	SFO	Dublin	DUB
Aer Lingus	Seattle	SEA	Dublin	DUB
Aer Lingus	Philadelphia	PHL	Dublin	DUB
Aer Lingus	Washington, DC (Dulles)	IAD	Dublin	DUB
Air France	New York (JFK)	JFK	Birmingham	BHX
Air France	New York (JFK)	JFK	London Heathrow	LHR
Air India	Newark	EWR	London Heathrow	LHR
Air New Zealand	Los Angeles	LAX	London Heathrow	LHR
Air New Zealand	San Francisco	SFO	London Heathrow	LHR

Photos: Dorset, England (left); Belfast, Northern Ireland (right)
Source: Brand USA Proprietary Research

Airline name	Flights to	Code	Flights from	Code
American Airlines	Chicago O'Hare	ORD	Dublin	DUB
American Airlines	Chicago O'Hare	ORD	London Heathrow	LHR
American Airlines	Chicago O'Hare	ORD	Manchester	MAN
American Airlines	Charlotte	CLT	London Heathrow	LHR
American Airlines	Charlotte	CLT	Dublin	DUB
American Airlines	Dallas/Fort Worth	DFW	London Heathrow	LHR
American Airlines	Los Angeles	LAX	London Heathrow	LHR
American Airlines	Miami	MIA	London Heathrow	LHR
American Airlines	New York (JFK)	JFK	Dublin	DUB
American Airlines	New York (JFK)	JFK	London Heathrow	LHR
American Airlines	New York (JFK)	JFK	Manchester	MAN
American Airlines	New York (JFK)	JFK	Birmingham	BHX
American Airlines	New York (JFK)	JFK	Edinburgh	EDI
American Airlines	Philadelphia	PHL	London Heathrow	LHR
American Airlines	Philadelphia	PHL	Glasgow	GLA
American Airlines	Philadelphia	PHL	Dublin	DUB
American Airlines	Philadelphia	PHL	Shannon	SNN
American Airlines	Philadelphia	PHL	Manchester	MAN
American Airlines	Phoenix	PHX	London Heathrow	LHR
Austrian Airlines	New York (JFK)	JFK	London Heathrow	LHR
Austrian Airlines	New York Newark	EWR	London Heathrow	LHR
British Airways	Atlanta	ATL	London Heathrow	LHR
British Airways	Austin	AUS	London Heathrow	LHR
British Airways	Baltimore	BWI	London Heathrow	LHR
British Airways	Boston	BOS	London Heathrow	LHR
British Airways	Charleston	CHS	London Heathrow	CHS
British Airways	Chicago O'Hare	ORD	London Heathrow	LHR
British Airways	Chicago O'Hare	ORD	Manchester	MAN
British Airways	Dallas/Fort Worth	DFW	London Heathrow	LHR
British Airways	Denver	DEN	London Heathrow	LHR
British Airways	Fort Lauderdale	FLL	London Gatwick	LGW

Source: Brand USA Proprietary Research

Airline name	Flights to	Code	Flights from	Code
British Airways	Houston	IAH	London Heathrow	LHR
British Airways	Las Vegas	LAS	London Heathrow	LHR
British Airways	Los Angeles	LAX	London Heathrow	LHR
British Airways	Miami	MIA	London Heathrow	LHR
British Airways	Nashville	BNA	London Heathrow	LHR
British Airways	New York (JFK)	JFK	London City	LCY
British Airways	New York (JFK)	JFK	London Gatwick	LGW
British Airways	New York (JFK)	JFK	London Heathrow	LHR
British Airways	New York Newark	EWR	London Heathrow	LHR
British Airways	New Orleans International	MSY	London Heathrow	LHR
British Airways	Orlando International	MCO	London Gatwick	LGW
British Airways	Philadelphia	PHL	London Heathrow	LHR
British Airways	Phoenix	PHX	London Heathrow	LHR
British Airways	Pittsburgh	PIT	London Heathrow	LHR
British Airways	San Diego	SAN	London Heathrow	LHR
British Airways	San Francisco	SFO	London Heathrow	LHR
British Airways	San Jose	SJC	London Heathrow	LHR
British Airways	Seattle	SEA	London Heathrow	LHR
British Airways	Tampa	TPA	London Gatwick	LGW
British Airways	Washington, DC (Dulles)	IAD	London Heathrow	LHR
British Airways	Nashville, TN	BNA	London Heathrow	LHR
Delta	Atlanta	ATL	Dublin	DUB
Delta	Atlanta	ATL	London Heathrow	LHR
Delta	Atlanta	ATL	Manchester	MAN
Delta	Boston	BOS	Dublin	DUB
Delta	Boston	BOS	London Heathrow	LHR
Delta	Dallas/Fort Worth	DFW	London Heathrow	LHR
Delta	Detroit	DTW	London Heathrow	LHR
Delta	Las Vegas	LAS	London Gatwick	LGW
Delta	Minneapolis	MSP	London Heathrow	LHR
Delta	New York (JFK)	JFK	Dublin	DUB
Delta	New York (JFK)	JFK	Edinburgh	EDI

Source: Brand USA Proprietary Research

Airline name	Flights to	Code	Flights from	Code
Delta	New York (JFK)	JFK	Glasgow	GLA
Delta	New York (JFK)	JFK	London Heathrow	LHR
Delta	New York (JFK)	JFK	Manchester	MAN
Delta	New York (JFK)	JFK	Shannon	SNN
Delta	New York Newark	EWR	Dublin	DUB
Delta	Orlando International	MCO	London Gatwick	LGW
Delta	Orlando International	MCO	Manchester	MAN
Delta	Philadelphia	PHL	London Heathrow	LHR
Delta	Portland International	PDX	London Heathrow	LHR
Delta	Seattle	SEA	London Heathrow	LHR
Delta	Salt Lake City	SLC	London Heathrow	LHR
Delta	New York (JFK)	JFK	Dublin	DUB
Ethiopian Air	Los Angeles	LAX	Dublin	DUB
Finnair	New York (JFK)	JFK	London Gatwick	LGW
Finnair	New York (JFK)	JFK	London Heathrow	LHR
Iberia	New York (JFK)	JFK	London Gatwick	LGW
Iberia	New York (JFK)	JFK	London Heathrow	LHR
Jet2	New York Newark	EWR	East Midlands	EMA
Jet2	New York Newark	EWR	Glasgow	GLA
Jet2	New York Newark	EWR	Leeds/Bradford	LBA
Jet2	New York Newark	EWR	Manchester	MAN
Jet2	New York Newark	EWR	Newcastle	NCL
KLM	New York (JFK)	JFK	London Heathrow	LHR
Lufthansa	New York Newark	EWR	Edinburgh	EDI
Lufthansa	New York Newark	EWR	London Heathrow	LHR
Norwegian Air	Boston	BOS	Belfast	BFS
Norwegian Air	Boston	BOS	Cork	ORK
Norwegian Air	Boston	BOS	Dublin	DUB
Norwegian Air	Boston	BOS	Edinburgh	EDI
Norwegian Air	Boston	BOS	London Gatwick	LGW
Norwegian Air	Boston	BOS	Shannon	SNN
Norwegian Air	Denver	DEN	London Gatwick	LGW

Source: Brand USA Proprietary Research

Airline name	Flights to	Code	Flights from	Code
Norwegian Air	Miami	MIA	London Gatwick	LGW
Norwegian Air	New York (JFK)	JFK	London Gatwick	LGW
Norwegian Air	New York Stewart International	SWF	Belfast	BFS
Norwegian Air	New York Stewart International	SWF	Dublin	DUB
Norwegian Air	New York Stewart International	SWF	Edinburgh	EDI
Norwegian Air	New York Stewart International	SWF	Shannon	SNN
Norwegian Air	Las Vegas	LAS	London Gatwick	LGW
Norwegian Air	Los Angeles	LAX	London Gatwick	LGW
Norwegian Air	San Francisco	SFO	London Gatwick	LGW
Norwegian Air	Orlando International	MCO	London Gatwick	LGW
Norwegian Air	Seattle	SEA	London Gatwick	LGW
Singapore Airlines	Houston George Bush	IAH	Manchester	MAN
Thomas Cook Airlines	Boston	BOS	Manchester	MAN
Thomas Cook Airlines	Las Vegas	LAS	Belfast	BFS
Thomas Cook Airlines	Las Vegas	LAS	Glasgow	GLA
Thomas Cook Airlines	Las Vegas	LAS	Manchester	MAN
Thomas Cook Airlines	Las Vegas	LAS	London Stansted	STN
Thomas Cook Airlines	Los Angeles	LAX	Manchester	MAN
Thomas Cook Airlines	Miami	Mia	Manchester	MAN
Thomas Cook Airlines	New York (JFK)	JFK	Manchester	MAN
Thomas Cook Airlines	Orlando International	MCO	Cardiff	CWL
Thomas Cook Airlines	Orlando International	MCO	Glasgow	GLA
Thomas Cook Airlines	Orlando International	MCO	Belfast	BFS

Source: Brand USA Proprietary Research

Airline name	Flights to	Code	Flights from	Code
Thomas Cook Airlines	Orlando International	MCO	London Gatwick	LGW
Thomas Cook Airlines	Orlando International	MCO	London Stansted	STN
Thomas Cook Airlines	Orlando International	MCO	Manchester	MAN
Thomas Cook Airlines	San Francisco	SFO	Manchester	MAN
Thomson	Orlando Sanford	SFB	Birmingham	BHX
Thomson	Orlando Sanford	SFB	East Midlands	EMA
Thomson	Orlando Sanford	SFB	Glasgow	GLA
Thomson	Orlando Sanford	SFB	Newcastle	NCL
Thomson	Orlando Sanford	SFB	Bristol	BRS
Thomson	Orlando Sanford	SFB	Edinburgh	EDI
Thomson	Orlando Sanford	SFB	London Gatwick	LGW
Thomson	Orlando Sanford	SFB	London Stansted	STN
Thomson	Orlando Sanford	SFB	Manchester	MAN
United	Chicago O'Hare	ORD	Edinburgh	EDI
United	Chicago O'Hare	ORD	London Heathrow	LHR
United	Chicago O'Hare	ORD	Shannon	SNN
United	Chicago O'Hare	ORD	Dublin	DUB
United	Houston	IAH	London Heathrow	LHR
United	Los Angeles	LAX	London Heathrow	LHR
United	New York Newark	EWR	Birmingham	BHX
United	New York Newark	EWR	Dublin	DUB
United	New York Newark	EWR	Edinburgh	EDI
United	New York Newark	EWR	Glasgow	GLA
United	New York Newark	EWR	London Heathrow	LHR
United	New York Newark	EWR	Shannon	SNN
United	San Francisco	SFO	London Heathrow	LHR
United	Washington, DC (Dulles)	IAD	Dublin	DUB
United	Washington, DC (Dulles)	IAD	London Heathrow	LHR
United	Washington, DC (Dulles)	IAD	Manchester	MAN
United	New York Newark	EWR	Manchester	MAN

Source: Brand USA Proprietary Research

Airline name	Flights to	Code	Flights from	Code
Virgin Atlantic	Atlanta	ATL	London Heathrow	LHR
Virgin Atlantic	Atlanta	ATL	Manchester	MAN
Virgin Atlantic	Detroit	DTW	London Heathrow	LHR
Virgin Atlantic	Washington, DC (Dulles)	IAD	London Heathrow	LHR
Virgin Atlantic	Boston	BOS	London Heathrow	LHR
Virgin Atlantic	Boston	BOS	Manchester	MAN
Virgin Atlantic	Chicago O'Hare	ORD	London Heathrow	LHR
Virgin Atlantic	Las Vegas	LAS	London Gatwick	LGW
Virgin Atlantic	Las Vegas	LAS	Manchester	MAN
Virgin Atlantic	Los Angeles	LAX	London Heathrow	LHR
Virgin Atlantic	Miami	MIA	London Heathrow	LHR
Virgin Atlantic	New York (JFK)	JFK	London Heathrow	LHR
Virgin Atlantic	New York (JFK)	JFK	Manchester	MAN
Virgin Atlantic	New York Newark	EWR	London Heathrow	LHR
Virgin Atlantic	Orlando International	MCO	Belfast	BFS
Virgin Atlantic	Orlando International	MCO	Glasgow	GLA
Virgin Atlantic	Orlando International	MCO	London Gatwick	LGW
Virgin Atlantic	Orlando International	MCO	Manchester	MAN
Virgin Atlantic	San Francisco	SFO	London Heathrow	LHR
Virgin Atlantic	San Francisco	SFO	Manchester	MAN
Virgin Atlantic	Seattle	SEA	London Heathrow	LHR

Note: Icelandair serves a number of U.S. destinations via Reykjavik, including Boston, Chicago, Denver, Anchorage, Minneapolis, New York, Orlando, Portland, Seattle and Washington, DC.

Source: Brand USA Proprietary Research

Market Snapshot

The United Kingdom economy showed resilience in 2017, confounding forecasts of a painful recession following the Brexit vote in 2016. It finally reached the size it had been before the recession, during the second quarter of 2013. GDP grew by 1.82 percent from 2016 to 2017, despite the sterling falling markedly at times against the dollar.

Overall consumer confidence in the economy has been on the upswing since the Brexit vote. It remains positive, though it has been tempered by uncertainty surrounding current Brexit negotiations. Average house prices had a 5.5-percent rise, from 2016 to 2017, and wages also continued to rise. The unemployment rate has rapidly contracted, and is now at 4.4 percent, with the number of people in the workforce at near-record levels. The United Kingdom Financial Times Stock Exchange (FTSE) 100 Index closed out 2017, up 7.6 percent over its 2016 closing. And, the FTSE 250 ended 2017 with a 14.7-percent increase over the year before.

The political situation in the United Kingdom has changed dramatically during the past five years. In 2014, Prime Minister David Cameron's coalition government was atop a divided political landscape. Theresa May became prime minister in July 2016 and led a Conservative-majority government. The transition to the new government has supported savings in welfare expenditures and cost-cutting in the state departments. It additionally maintained a resistance to tax increases on middle-income earners. Overall, the government has focused on shrinking the deficit and creating a surplus by 2022.

Photos: Blackpool, England (left), Stonehaven, Scotland (right)

The political right-wing owed much of its strength to the weakness of the left-wing opposition, which up until the 2017 snap election, trailed in the polls by 15 to 20 percent. However, following an unexpected general election result in May 2017, Theresa May and the Conservatives lost their majority in parliament. They suffered a net loss of 13 seats, as Jeremy Corbyn and the Labour Party gained 30 seats. Labour ran a relatively successful election campaign and this momentum continued further in to 2017 with the two parties neck and neck in opinion polls.

The outlook in the United Kingdom is of cautious optimism. Though the economy has recovered since the financial crisis, growth is relatively slow and has relied on getting more people into the workforce rather than productivity. Uncertainty about the impact of Brexit and global economic situations continue to be factors.

The United Kingdom is the largest, overseas source market for in-bound U.S. visitation. About 4.6 million U.K. travelers came to the United States during 2016. They spent $16 billion during their trips that year, an increase of $3.4 billion over 2015. The following year, in 2017, U.K. travelers to the United States also spent $16 billion—a level of spending that makes U.K. travelers. the fourth-highest spending group of international visitors who come to the USA from overseas markets.

The United Kingdom is the largest, overseas source market for in-bound U.S. visitation.

U.K. visitation to the USA increased 2 percent and 4 percent, in 2013 and 2014, respectively. Then, in 2015, it jumped by 18 percent. The record-setting level of U.K. arrivals that year finally eclipsed the previous record set back in 2000.

In 2016, the level of visitation fell by nearly 7 percent. This was largely attributed to a drop in the value of the pound and the Brexit vote. Visitation remained fairly stable in 2017, with a slight dip of just under 2 percent.

The Office for National Statistics (ONS) provides a useful demographic breakdown of United Kingdom leisure visitors to the USA in 2017:

AGE	VISITORS
0-15	150,000
16-24	297,000
25-34	706,000
35 -44	702,000
45-54	794,000
55-64	429,000
65+	324,000

Source: The Office for National Statistics (ONS)

Travelers, under the age of 25, are most likely to book air travel and accommodations separately, or separately from the same provider, in order to attain the lowest-priced airfare.

Travelers, ages 25 to 34, are most likely to use a mobile device to research travel plans. About 25 percent of these travelers use their devices to actually book holidays.

Travelers, ages 18 to 34, are the most frequent holiday–takers, especially long 'bucket-list' holidays.

Over a quarter (28 percent) of travelers, ages 35 to 44, are booking their holidays through High Street travel agents, which suggests that those booking family holidays welcome the benefits of face-to-face interaction.

Travelers over the age of 55 are more likely to book their holidays as packages. They prefer to make their plans and get the best prices available by phoning travel agents whom they trust.

Expanded use of digital channels for researching and booking travel plans— as demonstrated by consumers, under the age of 35—has had an impact on traditional travel agents. The number of actual stores has diminished by about 80 locations every year during the past decade. Also, the number of shop-based travel agents has dropped significantly, as have agent bookings. Yet, agent bookings still account for one in six holidays, according to the market-research firm Mintel Reports.

Many agents have set targets for improving their online bookings, as booking through online travel agents remains the most popular booking channel in the U.K. Some brands, however, like Flight Centre and Virgin Holidays, continue to see the value of in-store sales, as do more niche-holiday providers. Consumer trust in brand names allows well-established brands to flourish. Meanwhile, independent agents along High Street will have to work harder and look to digital channels to expand their bookings.

Source: National Travel & Tourism Office (May 2017)

Travel Markets

The United Kingdom and Ireland represent the largest overseas market for international arrivals to the United States.

Despite this, the United Kingdom and the United States are entering a period of uncertainty—a consequence of Brexit, the new U.S. administration, global terrorism and fluctuating currencies. As a result, there may be a reduction in spend and length of stay during their trips to the United States. However, it has not resulted in any significant downturn in U.S. visitation. Challenges have been offset by deeply rooted cultural, business and familial ties between the citizens of the United Kingdom and Ireland, and their fellow citizens in the United States.

Though United Kingdom travelers will have to accept price increases on all foreign travel in the short- to medium-terms, the outbound-travel market has firm standing. Annual holidays are nearly sacrosanct. Even during the aftermath of the 2008 global financial crisis, investments in leisure travel exceeded other discretionary spending, including expenditures for automotive maintenance and home repairs.

The most popular motivation for United Kingdom residents to travel abroad, in 2017, was to go on holidays. Such trips accounted for 68 percent of the travel by those who live in England, excluding London. For Londoners, 48 percent of travel abroad was connected to holiday travel. And, holiday travel also accounted for 71 percent of the trips abroad by residents of Scotland, and 75 percent of those trips by residents of Wales.

Residents of England, beyond London, were also more likely than Londoners to book inclusive tours, 40 percent compared to 23 percent. The Londoners, however, were more apt to travel for business—16 percent of their trips abroad, 2.3 million, were for this reason. Those business trips accounted for 23 percent of the spending abroad (£2 billion) by Londoners.

Additionally, Londoners were more likely than other United Kingdom residents to go to countries beyond Europe or North America when they went abroad—19 percent compared to a range of 11 to 14 percent.

Overall, United Kingdom residents made 65.7 million visits abroad during 2015, according to the UK's Office for National Statistics. This was a jump of 9.4 percent over 2014. The United Kingdom travellers also spent 9.8 percent more (£3.5 billion) in 2015, compared to 2014 (without any inflation adjustment). And, they stayed 10.7 percent more nights abroad—more than 682 million nights.

The total number of holiday trips abroad increased by 9.4 percent, from 2014 to 2015. Visits to friends or family, and visits for business, were up 11 percent and 5.8 percent, respectively. Spending also was up—7.6 percent on holiday visits, nearly 3 percent on visits to friends or family, and a substantial 30 percent on business trips.

Visits to North America, Europe and "other countries" expanded in 2015 from the year before—up 6.4 percent, 10 percent and 7.3 percent, respectively.

Spending by the UK travelers on these trips also increased: 14.9 percent in North America, 12.4 percent in Europe and 1.9 percent in "other countries."

For United Kingdom travelers, the United States is the most visited destination among all long-haul trips. It is also the third-most popular destination among countries where a trip exceeds four nights.

During the past five years, airlines have increased direct seats by 27 percent and are launching new direct flights from the United Kingdom to the United.

These carriers are flying into established U.S. gateway cities, in addition to a second tier of U.S. cities. These new routes are opening up more of the United States to United Kingdom travellers. As Brand USA's "proximity campaign" suggests, international visitors have access to an array of U.S. travel experiences and attractions, all within a reasonable radius of their original destination. And, with low-cost, trans-Atlantic flights driving fares down, an expanding number of United Kingdom travellers can opt to visit the United States.

For United Kingdom travelers, the United States is the most visited destination among all long-haul trips.

Tour operators in the United Kingdom and Ireland have noted that the demand for multi- centre bookings—combining two or more destinations into a single package has doubled in recent years. More travellers want to see more of what a country or region has to offer.

The United Kingdom is a well-established source market for inbound U.S. visitation. United Kingdom travellers, however, have shown a shift in their inclination to become more adventurous. They are opting for trips to alternative U.S. locations, some "off the beaten path." Travel to such places as Texas, the Deep South and the Pacific Northwest has increased.

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: London, England (left); Rhossili, Wales (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	🐦 @VisiteOsUSA 📷 @VisitTheUSA	f facebook.com/VisitTheUSAau ▶ YouTube.com/VisitTheUSA	#VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	🐦 @VisiteOsUSA 📷 @VisitTheUSA	f facebook.com/VisiteOsUSA ▶ YouTube.com/VisiteOsUSA	#VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	🐦 @VisitTheUSAca 📷 @VisitTheUSA	f facebook.com/VisitTheUSAca ▶ YouTube.com/VisitTheUSA	#VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	🐦 @VisitTheUSAca 📷 @VisitTheUSA	f facebook.com/VisitTheUSAca ▶ YouTube.com/VisitTheUSAfr	#VisitTheUSA
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	🐦 @VisitTheUSAes 📷 @VisitTheUSA	f facebook.com/VisitTheUSAcl ▶ YouTube.com/VisitTheUSAes	#VisitTheUSA
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	**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://i.youku.com/gousacn **Weishi** (like Vine): http://www.weishi.com/u/23484775 **Wechat** (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局 **Lofter** (Photo sharing platform): http://GoUSA.lofter.com		#VisitTheUSA
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	🐦 @VisitTheUSAes 📷 @VisitTheUSA	f facebook.com/VisitTheUSAco ▶ YouTube.com/VisitTheUSAes	#VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	🐦 @VisitTheUSAfr 📷 @VisitTheUSA	f facebook.com/VisitTheUSAfr ▶ YouTube.com/VisitTheUSAfr	#VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	🐦 @VisitTheUSA 📷 @VisitTheUSA	f facebook.com/VisitTheUSAde ▶ YouTube.com/VisitTheUSAde	#VisitTheUSA
India	GoUSA.in	Plan Your USA Trip Now	🐦 @GoUSAin 📷 @VisitTheUSA	f facebook.com/GoUSAin ▶ YouTube.com/GoUSAin	#USAtrip
Japan	GoUSA.jp	今すぐ USAへの 旅の 計画を	🐦 @GoUSAjp 📷 @VisitTheUSA	f facebook.com/GoUSAjp ▶ YouTube.com/GoUSAjp	アメリカ旅行
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	🐦 @VisitTheUSAes 📷 @VisitTheUSA	f facebook.com/VisitTheUSAmx ▶ YouTube.com/VisitTheUSAes	#VisitTheUSA
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	🐦 @GoUSAkr 📷 @VisitTheUSA	f facebook.com/GoUSAkr ▶ YouTube.com/GoUSAkr	#미국여행
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	🐦 @VisitTheUSA 📷 @VisitTheUSA	f facebook.com/VisitTheUSAse ▶ YouTube.com/VisitTheUSA	#VisitTheUSA
Taiwan	GoUSA.tw	n/a	n/a	f facebook.com/GoUSA.official	n/a
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	🐦 @VisitTheUSAuk 📷 @VisitTheUSA	f 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=1017). Base: United Kingdom Intercontinental travelers.

48%	46%	44%	29%	28%
Cultural historic attractions	Local lifestyle	Beaches/seaside attractions	Dining/ gastronomy	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=1017). Base: United Kingdom Intercontinental travelers.

41%	40%	39%	36%	24%
Friendly	Diverse	Adventurous	Energetic	Arrogant

Source: Brand USA Market Intelligence Study 2018
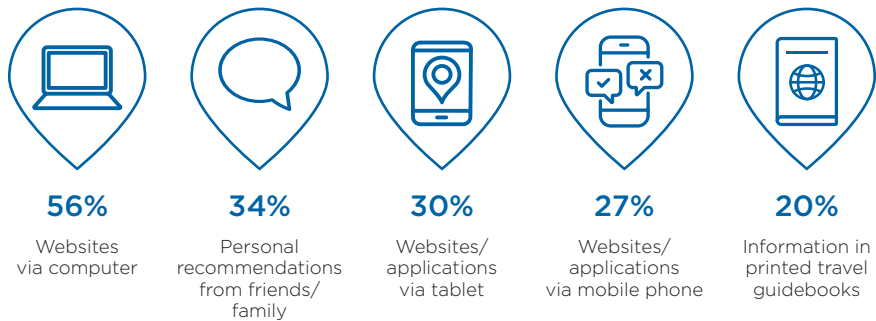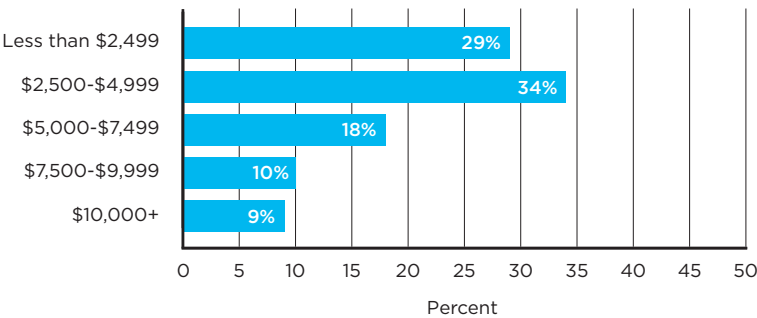
Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: United Kingdom Intercontinental travelers (N=1017).

56%	**34%**	**30%**	**27%**	**20%**
Websites via computer	Personal recommendations from friends/ family	Websites/ applications via tablet	Websites/ applications via mobile phone	Information in printed travel guidebooks

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: United Kingdom Intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding (Conversion GBP to USD=1.319).
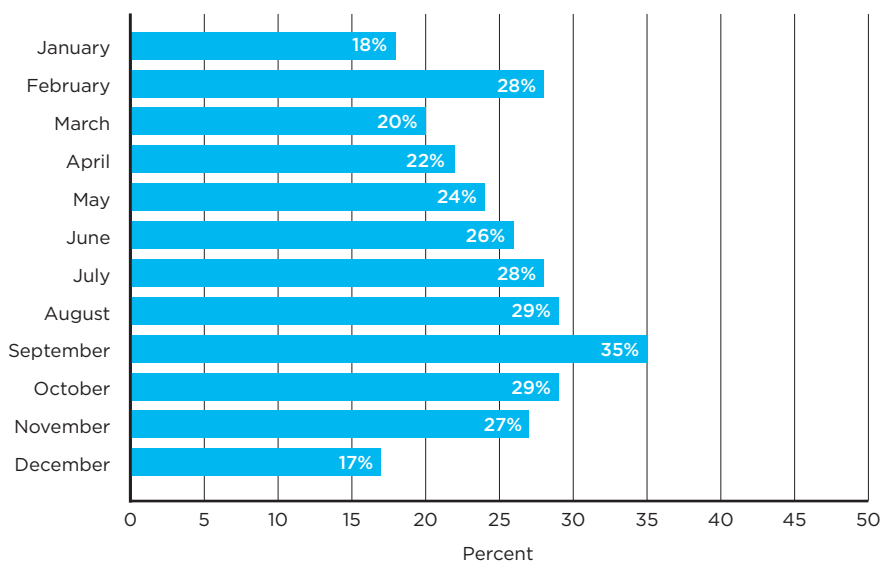
Spend	Percent
Less than $2,499	29%
$2,500-$4,999	34%
$5,000-$7,499	18%
$7,500-$9,999	10%
$10,000+	9%

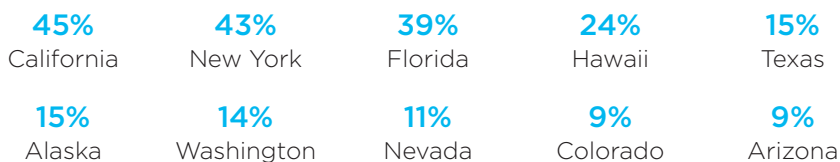Percent

Mean: $4,897 **Median:** $3,899

Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: United Kingdom Intercontinental travelers 2017 (N=1017).
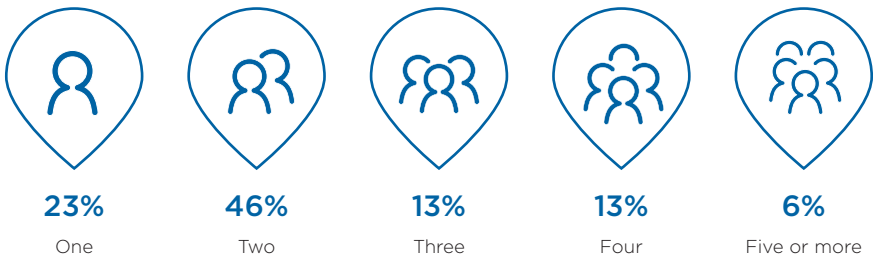
Month	Percent
January	18%
February	28%
March	20%
April	22%
May	24%
June	26%
July	28%
August	29%
September	35%
October	29%
November	27%
December	17%

Percent

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: United Kingdom Intercontinental travelers with interest in visiting the United States (N=947).
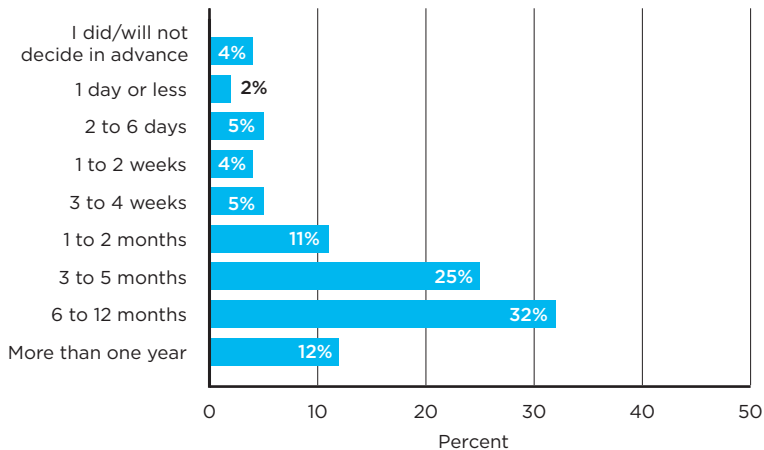
45% California	**43%** New York	**39%** Florida	**24%** Hawaii	**15%** Texas
15% Alaska	**14%** Washington	**11%** Nevada	**9%** Colorado	**9%** Arizona

Source: Brand USA Market Intelligence Study 2018

Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: United Kingdom Intercontinental travelers 2017 (N=1017). Note: Totals may not add up to 100% due to rounding.

23%	**46%**	**13%**	**13%**	**6%**
One	Two	Three	Four	Five or more

Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination?
Base: United Kingdom Intercontinental travelers 2017 (N=1017). Note: Totals may not add up to 100% due to rounding.

Category	Percent
I did/will not decide in advance	4%
1 day or less	2%
2 to 6 days	5%
1 to 2 weeks	4%
3 to 4 weeks	5%
1 to 2 months	11%
3 to 5 months	25%
6 to 12 months	32%
More than one year	12%

Source: Brand USA Market Intelligence Study 2018

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: United Kingdom Intercontinental travelers 2017 (N=1017). Note: Totals may not add up to 100% due to rounding.

Category	Percent
1 day or less/did not decide in advance	2%
2 to 6 days	2%
1 to 2 weeks	4%
3 to 4 weeks	4%
1 to 2 months	18%
3 to 5 months	32%
6 to 12 months	33%
More than one year	5%

Percent

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: United Kingdom Intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.

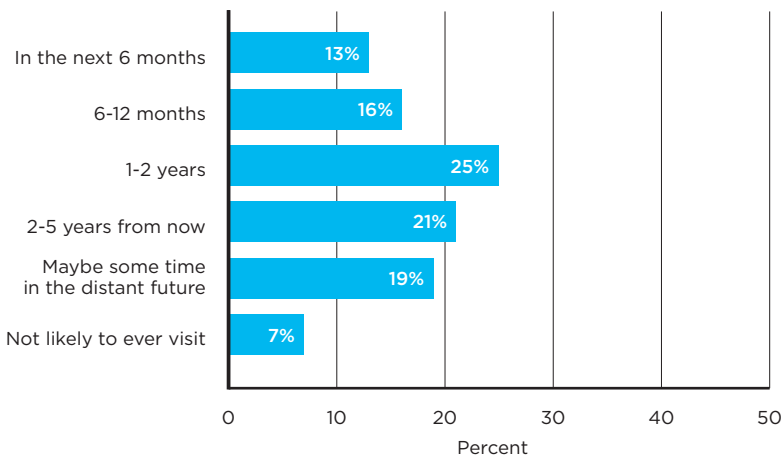| 37%	31%	22%	7%	3%
I would bring it up to recommend as a destination	I would tell people positive things about it if it were brought up	I would tell people neither positive nor negative things if it were brought up	I would tell people negative things if it were brought up	I would bring it up to discourage people from traveling there

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: United Kingdom Intercontinental travelers 2017 (N=1017).
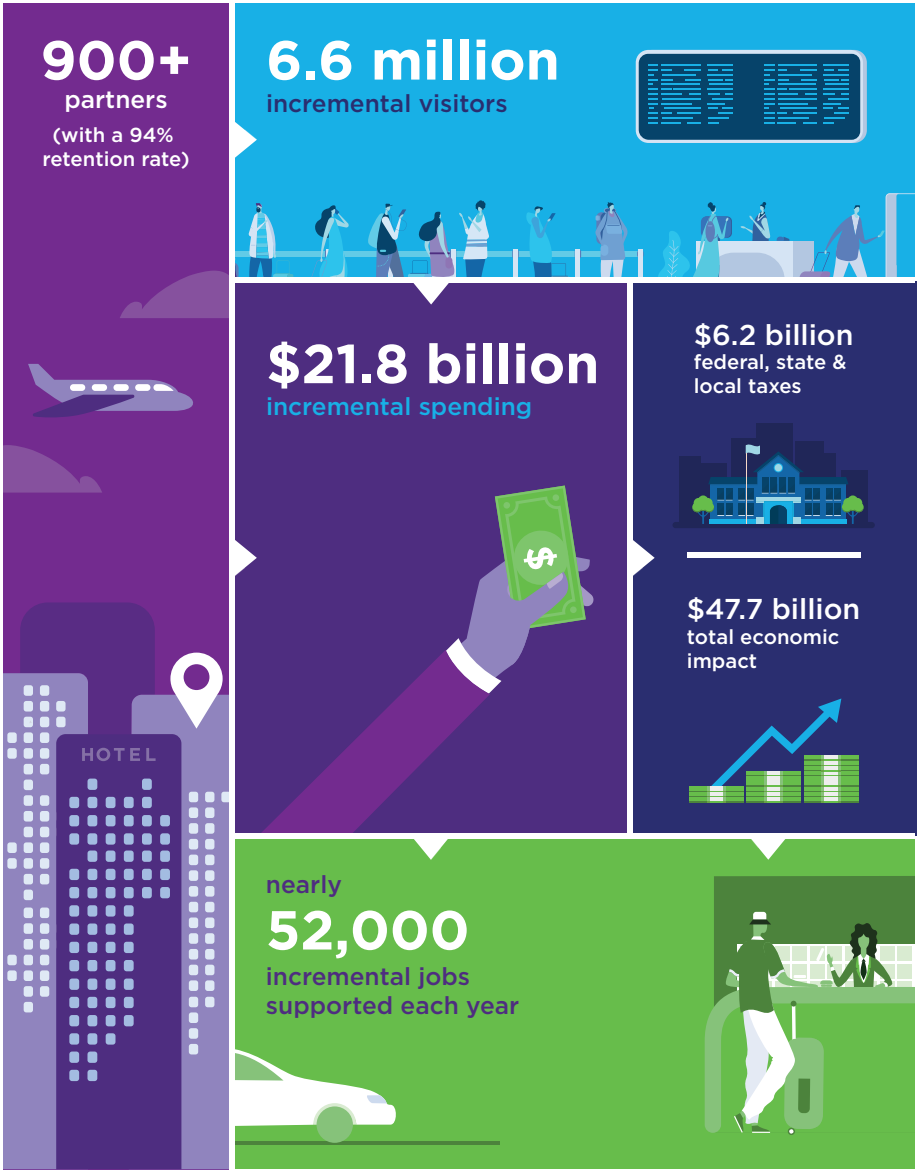
Highlights of Success

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

HOTEL

- 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 Association (UK) and Visit USA Committee, Ireland

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.

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Photos: Cardiff, Wales (left); Glendalough, Ireland (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 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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