



Market Information 2018

AUSTRALIA & NEW ZEALAND



Cover images: Grand Teton National Park, Wyoming and Brooklyn, New York

About this Guide

Brand USA is pleased to present this guide in partnership with the U.S. Commercial Service and the National Travel and Tourism Office (NTTO). It includes snapshots of the economies in Australia and New Zealand 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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About Brand USA

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.

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 800 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.

According to studies by Oxford Economics, over the past five years Brand USA's marketing initiatives have helped welcome 5.4 million incremental visitors to the USA, benefiting the U.S. economy with \$38.4 billion in total economic impact, and supporting more than 51,000 incremental jobs each year.

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.

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

We at Brand USA — the public-private partnership established eight years ago to promote international tourism to the U.S. — look forward to working with you to generate business in the Australian and New Zealand outbound-travel sectors. This guide will familiarize you with the elements that make this pair of markets so attractive.



You will also discover receptive audiences in these two countries. In a Brand USA survey assessing where Australians and New Zealanders intend to go on their next holiday, the USA leads all other global destinations. It is the choice of nearly one out of five travelers.

Australia ranks as the 10th-largest source market for inbound visitation to the United States. About 1.35 million Australians traveled to our country during 2016. On the spending side, Australians were number-eight among the top-10 international visitors who came to the United States that year, having spent a total of \$8.7 billion.

It is significant to note that many of the Australians and New Zealanders who visit the United States are inclined to make the trip more than once. And with intense competition among air carriers, fares are staying low.

In addition to coming the USA in record numbers, the Australians and New Zealanders are staying longer than other groups. The average length of stay is 22 days—second longest among travelers from the top 10-source markets.

Presently, Brand USA is expanding its new travel-entertainment TV channel, GoUSA TV, which launched earlier this year. Brand USA is the first destination-marketing organization to develop such an outlet. GoUSA TV is now available on Roku, Apple TV and Amazon Fire TV around the globe. In 2019, the channel will also be on Google Chromecast.

Now in its first stages of development, GoUSA TV features an assortment of travel experiences across four different categories: The Great Outdoors, Road Trips, Food and Drink, and Culture and Events. GoUSA TV will increase programming to include additional themes and formats, including series, films, videos and live videos.

Brand USA's new giant-screen film, "America's Musical Journey" – since its release earlier this year – is another significant part of our outreach for introducing international travelers to the United States. The unique styles of American music evoke our cultural heritage and the stories associated with iconic locations across the U.S. landscape.

Overall, Brand USA, has committed to a comprehensive "digital-screen strategy" that presents a storytelling approach regarding the diversity of travel possibilities in the United States. Using mediums that run the gamut from quick mobile content to giant-screen films, the storytelling continues to be relevant, engaging and authentic.

Australia is also one of four target markets in Brand USA's new "Sounds Travel" campaign, which uses 3-D audio to highlight U.S. travel. Consumers can select audio options that were recorded in specified U.S. destinations. The audio experiences, best gained through headphones, come with other related content – articles, photos and itineraries. Brand USA partnered with Expedia Media Solutions to create the program.

I invite you to talk to our team about trip experiences in the USA and opportunities to enhance your marketing efforts in Australia and New Zealand. They can discuss with you the best ways to inspire these "down-under" travelers to book their trips to the USA now.

This past February, for instance, Brand USA participated in the annual Visit USA travel-agent expos, held in the Australian cities of Brisbane, Melbourne and Sydney. Brand USA also hosted its annual B2B Day in Sydney, where top buyers had individual appointments with more than 40 U.S. industry partners.

Also of note, is Brand USA's dedicated travel-trade website. This online portal, which launched at the start of this year, is a comprehensive gateway that allows industry professionals to easily navigate information about U.S. travel. In the Australia and New Zealand markets, which have 25,000 retail travel agents and where on-site travel agencies are especially important, this website is sure to make a difference.

Together, we are marketing the USA!

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Geography

Area

Australia

7,741,220 sq km

Source: CIA World Factbook 2018

New Zealand

268,838 sq km

Climate

Australia

Generally arid to semiarid; temperate in south and east; tropical in north.

New Zealand

Temperate with sharp regional contrasts.

Demographics

Population

Australia

23,232,413 (July 2017 est.)

New Zealand

4,510,327 (July 2017 est.)

Source: CIA World Factbook 2018

Largest Metropolitan Areas, Australia

Sydney: 4.505 million

Perth: 1.861 million

Melbourne: 4.203 million

Adelaide: 1.256 million

Brisbane: 2.202 million

Canberra (capital): 430,169

Largest Metropolitan Areas, New Zealand

Auckland: 1.344 million

Wellington (capital): 383,000

(2015 est.)

Source: CIA World Factbook 2018

Age Structure

Age	Australia	New Zealand
0-14 years	17%	20%
15-24 years	13%	14%
25-54 years	42%	40%
55-64 years	12%	12%
65 years and older	16%	15%
Median age	38.6 years	38 years
Population growth rate (2017 est.)	1.05%	0.8%

Source: CIA World Factbook 2018

Economy

Australia

Growth Domestic Product (GDP): \$1.235 trillion

GDP real growth rate: 2.2% (2017 est.)

GDP—per capita: \$49,900 (2017 est.)

Unemployment rate: 5.6% (2017 est.)

Inflation rate: 2%

New Zealand

Growth Domestic Product (GDP): \$185.7 billion (2017 est.)

GDP real growth rate: 3.5% (2017 est.)

GDP—per capita: \$38,500 (2017 est.)

Unemployment rate: 4.9% (2017 est.)

Inflation rate: 2.2%

Source: CIA World Factbook 2018

Vacation Allocation and Public Holidays

National public holidays, 2018 (Australia)

New Year's Day, Monday, Jan. 1

Australia Day, Friday, Jan. 26

Good Friday, March 30

Easter Monday, April 2

ANZAC Day, Wednesday, April 25

Queen's Birthday, Monday, June 11

Labour Day, Monday, Oct. 1

Christmas Day, Tuesday, Dec. 25

Boxing Day, Wednesday, Dec. 26

National public holidays, 2018 (New Zealand)

New Year's Day, Monday, Jan. 1

Day after New Year's Day, Monday, Jan. 2

Waitangi Day, Tuesday, Feb. 6

Good Friday, Friday, March 30

Easter Monday, Monday, April 2

ANZAC Day, Wednesday, April 25

Queen's Birthday, Monday, June 4

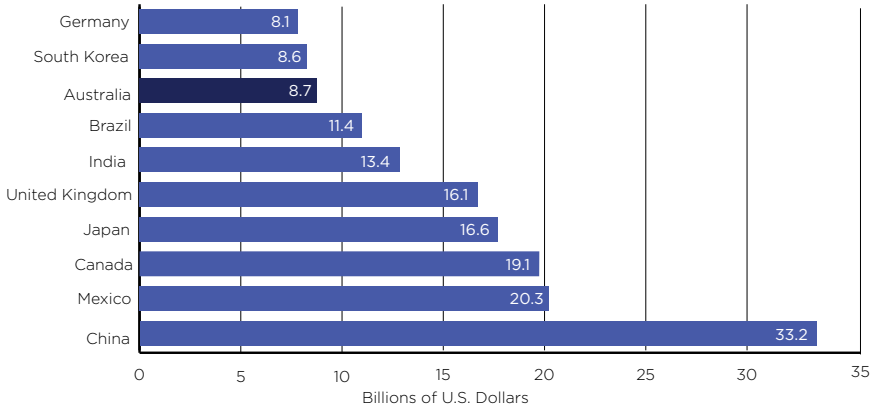
Labour Day, Monday, Oct. 22

Christmas Day, Tuesday, Dec. 25

Boxing Day, Wednesday, Dec. 26

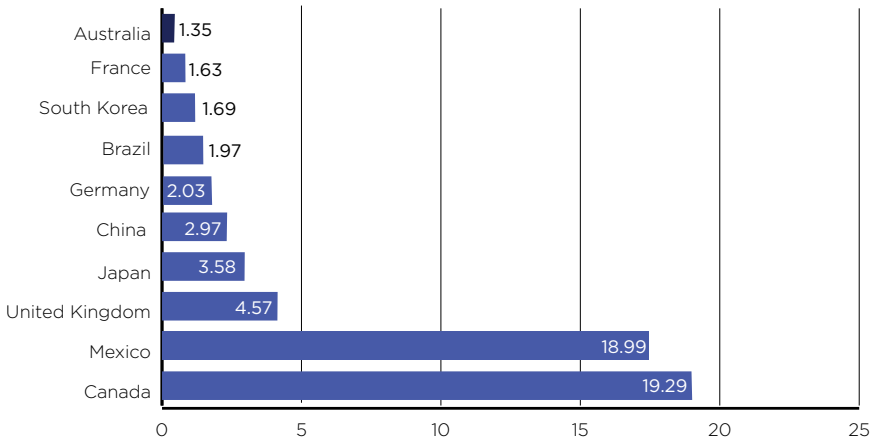
International Visitation Trends*

International Tourism Expenditures 2016 (U.S. Dollar billion)



Source: U.S. Department of Commerce National Travel and Tourism Office, 2016 Edition

International Arrivals to the USA 2016



Source: U.S. Department of Commerce National Travel and Tourism Office, 2016 Edition

*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Travel Trends*

Spending Trends (Exports)—Australia (U.S. Dollar Million)

Year	Total Travel & Tourism Exports	Travel Receipts	Passenger Fare Receipts	Change (%) in Total Exports
2009	\$6,712	\$5,724	\$988	2
2010	\$7,155	\$6,004	\$1,151	35
2011	\$7,751	\$6,411	\$1,340	11
2012	\$8,092	\$6,604	\$1,488	-4
2013	\$8,935	\$7,326	\$1,609	22
2014	\$10,016	\$8,324	\$1,692	10
2015	\$11,805	\$10,187	\$1,618	10
2016	\$8,727	\$7,937	\$790	-7
Change 2016/2009	\$4,334	\$3,993	\$341	99

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

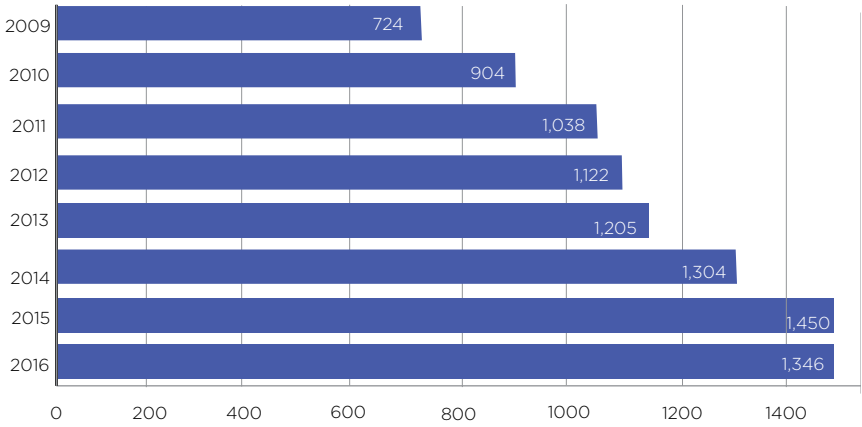
Spending Trends (Exports) —New Zealand (U.S. Dollar Million)

Year	Total Travel & Tourism Exports	Travel Receipts	Passenger Fare Receipts	Change (%) in Total Exports
2009	\$510	\$511	(1)	-13
2010	\$614	\$615	(1)	20
2011	\$707	\$708	(1)	15
2012	\$850	\$851	(1)	20
2013	\$940	\$850	\$90	11
2014	\$1,155	\$1,084	\$71	23
2015	1,288	\$1,253	\$35	12
2016	\$1,257	\$1,229	\$28	-2
Change 2016/2009	\$5,087	\$747	\$29	146

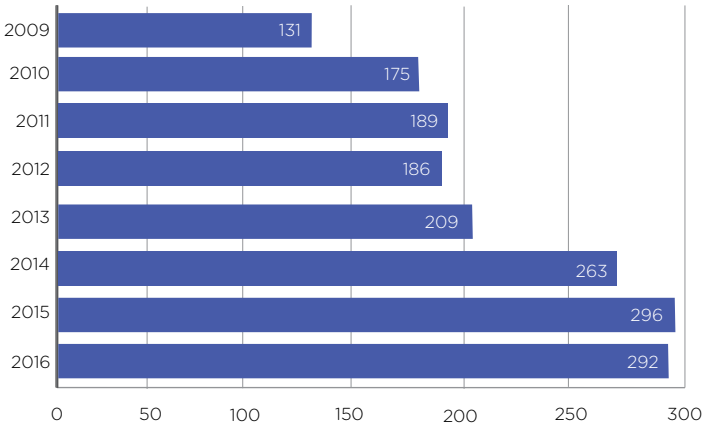
Source: U.S. Department of Commerce National Travel and Tourism Office

*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Visitation Trends (arrivals)—Australia



Visitation Trends (arrivals)—New Zealand



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

*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Traveler Characteristics*

Main Purpose of Trip

Main Purpose of Trip	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Vacation/Holiday	68	63	69	64	1.0	1.5
Visit Friends/Relatives	17	21	16	21	-0.7	-0.7
Business	6	5	5	5	-0.2	-0.2
Convention/Conference/ Trade Show	6	8	6	8	0.3	0.1
Education	4	2	3	1	-0.5	-1.8
Health Treatment	0.1	0.0	0.3	0.0	0.2	0.0
Religion/Pilgrimages	0.3	0.3	0.3	2	0.0	1.2
Other	0.2	0.4	0.2	0.3	0.0	-0.1

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

All Purposes of Trip

Purpose of Trip	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Business	8	6	7	8	-0.2	1.8
Visit Friends/Relatives (VFR)	33	39	31	39	-2.2	0.0
Vacation/Holiday	80	82	81	80	0.1	-1.7
Convention/Conference/ Tradeshaw	9	9	8	10	-1.7	1.0
Education	7	6	5	3	-2.2	-2.8
Religion/Pilgrimages	1	1	1	1	-0.2	0.8
Health Treatment	0.2	0.2	1	0.3	0.3	0.1
Other	0.3	1.3	1	0.0	0.3	-0.8

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

Select Traveler Characteristics

Traveler Characteristics	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Length of Stay in U.S. (mean nights)	22.4	21.1	22.3	16.2	-0.1	-4.9
Length of Stay in the U.S. (median nights)	15	14	14	12	-1.0	-2.0
First International Trip to the U.S.	29	29	27	18	-2.7	-11.2

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

*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Activity Participation While in the USA

Activity	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Shopping	92	92	92	94	-0.1	2.1
Sightseeing	91	91	90	90	-0.4	-1.3
National Parks/ Monuments	60	55	57	51	-2.3	-4.0
Experience Fine Dining	46	36	40	34	-5.7	-2.5
Small Towns/ Countryside	46	51	46	43	0.0	-8.7
Art Gallery/Museum	44	39	40	39	-4.0	-0.3
Amusement/Theme Parks	36	35	35	36	-1.1	0.8
Historical Locations	49	48	48	43	-0.8	-4.8
Guided Tours	52	51	49	43	-3.3	-7.8
Nightclubbing/ Dancing	27	14	20	10	-7.4	-4.1

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

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

Visitation to U.S. Destinations/Regions	Market Share 2015 (%)	Volume 2015 (000)	Market Share 2016 (%)	Volume 2016 (000)
Regions				
Pacific	53.52	776	52.53	707
States				
California	49.34	715	49.28	664

Note: No destinations meet the minimum sample requirement for New Zealand.

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

*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Transportation Used in the United States

Transportation Types Used in the USA	2015 (%)		2016 (%)		Point Change	
	Australia	New Zealand	Australia	New Zealand	Australia	New Zealand
Airline Travel between U.S. Cities	65	57	58	56	-6.6	-1.5
Taxicab/Limousine	48	45	47	45	-1.2	-0.4
Auto Private or Company	37	42	40	37	3.2	1.3
City Subway/Tram/Bus	43	33	44	43	1.2	0.1
Bus between Cities	28	20	23	18	-5.0	17.5
Rented Auto	32	33	35	36	2.8	2.5
Railroad between Cities	7	12	13	13	-0.5	0.2
Ferry/River Taxi/Srt Scenic Cruise	17	18	15	13	-2.3	-5.4
Motor Home/Camper	2	3	1	1	-0.8	-1.6
Cruise Ship/River Boat 1+ Nights	14	7	9	5	-5.1	-1.8
Rented Bicycle/Motorcycle/Moped	7	4	6	4	-0.2	0.4

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

**U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.*

Air Travel Information

Nonstop flights from Australia to the USA

Airline	Origin	Destination
Qantas	Melbourne (MEL)	Los Angeles (LAX)
	Sydney (SYD)	Los Angeles (LAX)
	Brisbane (BNE)	Los Angeles (LAX)
	Sydney (SYD)	Dallas Fort Worth (DFW)
	Sydney (SYD)	San Francisco (SFO)
	Sydney (SYD)	Honolulu (HNL)
United Airlines	Melbourne (MEL)	Los Angeles (LAX)
	Sydney (SYD)	Houston (IAH)
	Sydney (SYD)	Los Angeles (LAX)
	Sydney (SYD)	San Francisco (SFO)
Delta	Sydney (SYD)	Los Angeles (LAX)
Virgin Australia	Sydney (SYD)	Los Angeles (LAX)
	Brisbane (BNE)	Los Angeles (LAX)
	Melbourne (MEL)	Los Angeles (LAX)
American Airlines	Sydney (SYD)	Los Angeles (LAX)
Hawaiian Airlines	Sydney (SYD)	Honolulu (HNL)
	Brisbane (BNE)	Honolulu (HNL)
Jetstar	Sydney (SYD)	Honolulu (HNL)
	Melbourne (MEL)	Honolulu (HNL)

New Zealand Air Travel Information

Nonstop flights from Australia to the USA

Airline	Origin	Destination
Air New Zealand	Auckland (AKL)	Los Angeles (LAX)
	Auckland (AKL)	San Francisco (SFO)
	Auckland (AKL)	Houston (IAH)
	Auckland (AKL)	Honolulu (HNL)
United Airlines	Auckland (AKL)	San Francisco (SFO)
	Auckland (AKL)	Chicago (ORD)
American Airlines	Auckland (AKL)	Los Angeles (LAX)
Hawaiian Airlines	Auckland (AKL)	Honolulu (HNL)

Market Snapshot

Australians and New Zealanders have long had a love affair with the USA. Inspired by popular culture and iconic USA travel experiences, Antipodean travelers have consistently placed the USA at the top of their bucket list. Over recent years, visitation has reached record levels, in fact more than doubling over the past 10 years. Market share has also grown; the USA is now the number one long haul destination from Australia and New Zealand.

Australians and New Zealanders are also traveling to the USA more frequently than ever before. As new airlift and increased connectivity has a downward pressure on airfares and opens up easier access to new areas of the country. Repeat visitation is currently 73% an increase of 2% compared to the previous year. Though the populations of Australia and New Zealand are relatively small – 24 million and 4.5 million, respectively – the impressive number of repeat visitors is an offsetting factor

Visitors from Australia and New Zealand travel further and stay longer than most other inbound markets. On average visiting 2.1 states per trip and staying on average for 22 days. Consequently they tend to spend more too. Australia ranks as the 8th largest market for international visitor spend in the U.S. despite having the smallest population of any nation in the top 10 markets.

Source: Survey of International Air Travelers, Australian Travelers to the U.S., January-December 2016, U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Travel markets summary

Australia and New Zealand are enjoying a period of economic stability. Famously, Australia has posted 25 years of unbroken growth. Steady continuous GDP growth, stable exchange rates, high employment rates and low interest rates have all led to high consumer confidence. The main economic challenges are based on stalled wage growth, but in overall terms fiscal conditions are working in favor to fuel increased outbound travel.

This context is supporting strong intention to travel overseas, which remains at an all-time high level. A 2017 Roy Morgan survey reports that 11 per cent of the population is intending to travel overseas in the next 12 months. Travelers from this market tend to be relatively resilient to socio / economic / political factors which appear to have less impact on intention to travel. Living in remote island nations, it's no surprise Australians and New Zealanders

are accustomed to traveling internationally for their vacation. Of those people who took an overseas trip for leisure last year, 77 per cent traveled internationally once. 20 per cent took two or three overseas vacations. A very fortunate 1.6 per cent had four or five overseas vacations.

The other key factor in visitation growth is airlift / airfares. Airlift to the USA from Australia and New Zealand is at record high levels, pushing fares down to record lows. Fares have dropped by more than 30 per cent over the past five years. The average return airfare to LAX can be as low as USD \$850, the equivalent to just three days average wage. It's never been so affordable to travel to the USA. In addition new routes are opening, decreasing travel time to southern and eastern USA. In 2018 United will start flying Sydney to Houston, the only airline from Australia to operate this route.

Australians and New Zealanders who travel to the United States go primarily on leisure trips. According to the U.S. Department of Commerce National Travel and Tourism Office, 85 percent visit for holidays (VFR). Only 6 percent visit for conventions, conferences and tradeshow, and 5 percent visit for general business travel. It is thought that travel distance factors likely reduce the demand for business travel.

Once in the United States, Australian travelers participate in various leisure-type activities: 92 per cent go shopping; 90 per cent go sightseeing; 57 per cent visit a national park or monument. In addition, 48 per cent visit historical locations, 40 per cent experience fine dining and 40 per cent go to art galleries or museums. It is noteworthy that 52 percent of visiting Australians take guided tours. Popular tour operators for this market include Trafalgar, Scenic, APT and Collette.

The peak season for U.S. travel by Australians and New Zealanders runs June through September – peak season in the United States, winter “Down Under.” Smaller spikes in U.S. arrivals occur in December and January, coinciding with school holidays in Australia and New Zealand. The two peak booking periods are February-March and July-August. However, as travel frequency increases, there is a trend seeing the booking seasons stretch out.

The top five sources for researching a holiday are: directly with airlines (49%); online travel agency (46%); travel agency office (39%); personal recommendation (38%); travel guides (20%). Both travel agents and the internet play important roles in the research and booking process.

Australia and New Zealand remains one of the rare markets in the world where a consumer will research online and offline and then walk into a physical store to make their booking with an agent. Working with, educating and incentivizing agents is a key part of the best practice approach in this market. The retail travel industry network remains a crucial influencer on travel decision-making. There are approximately 25,000 retail travel agents in Australia and New Zealand. Most work in a retail store, while home based 'travel managers' are increasing in numbers, competing with high levels of customer service, well established clientele and a bespoke approach.

The majority of wholesale distribution within Australia and New Zealand firmly sits between the two dominant players - Flight Centre Travel Group (Infinity Holidays) and Helloworld Travel Group (Qantas Holidays and Viva Holidays). Between them they claim around 80 per cent of the market.

The remaining percentage of wholesale distribution is split between smaller companies, including Adventure World, Freestyle Holidays, Venture Holidays, Excite Holidays, and others.

Technological advances, a refined user experience and niche specialization are the keys to the smaller wholesalers' success, while vertical integration and mass reach are key to the larger wholesalers' success.

The internet's role has strengthened over recent years, following a long period of fragmentation cluttered with small independents across the online travel space in Australia and New Zealand. Expedia has acquired Wotif.com and Orbitz, making it one of four dominant players that have emerged in this space Down Under. OTAs are offering more choice for customers and loyalty promotions are gaining traction; for example hotels.com 'Rewards' book 10 nights, get one free.

However the OTA sector is smaller in Australia and New Zealand than most other developed markets.

New developments

There has been a 10-fold increase in representation of U.S. DMOs locally in the last five years. In 2017 4 new destinations took representation: Seattle, Portland, Memphis and Philadelphia. The additional representation is positive, increasing the total share of voice for the USA. Brand USA works with all destinations in market to create collective marketing initiatives.

A new trend that our trade partners are reporting, is more Australians and New Zealanders using travel agents to design bespoke itineraries for their USA holidays. This would appear to be part of a wider trend across consumer behavior with the demand for 'unique' travel experiences. Tour operators are reporting this as a challenge as contracting strategies needs to adapt. The main beneficiaries of this trend would appear to be 'travel managers' - their ability to deliver high customer service levels should allow them to grow their market share. As a knock on affect, traditional retailers have reacted by increasing their presence in this sector. Helloworld acquired Mobile Travel Agents (MTA) and Flight Centre acquired Travel Partners.

There have been a number of acquisitions and mergers across the trade sector as organisations look for scale and competitive advantage in ever changing market. Notable recent acquisitions were Webjet's purchase of Online Republic; Luxury Escape Group's purchase of Bon Voyage Travel; and Helloworld's buy out of Magellan Travel Group.

Brand USA Online Channels

Digital/Social Marketing

Brand USA employs digital and social media marketing strategies to inspire, engage, and activate international travelers to visit the United States during the year through:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Online video
- Retargeting and other targeted advertising

PROPRIETARY CONSUMER WEBSITE PLATFORMS

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which is active 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.

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](https://twitter.com/VisitTheUSA)
- Facebook: [Facebook.com/VisitTheUSA](https://www.facebook.com/VisitTheUSA)
- YouTube: [YouTube.com/VisitTheUSA](https://www.youtube.com/VisitTheUSA)
- Instagram: [VisitTheUSA](https://www.instagram.com/VisitTheUSA)

The following campaign hashtags support global and thematic promotions and initiatives:

- Global: [#VisitTheUSA](https://twitter.com/VisitTheUSA)
- Flavors/Culinary: [#TasteUSA](https://twitter.com/VisitTheUSA)
- Road Trips: [#RoadTripUSA](https://twitter.com/VisitTheUSA)
- Great Outdoors: [#OutdoorsUSA](https://twitter.com/VisitTheUSA)
- Market the Welcome: [#USAWelcome](https://twitter.com/VisitTheUSA)

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in Chart 1.

CHART 1

Digital Channels

MARKET	URL	Local Tagline	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSAca	@VisitTheUSAca	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	fr/VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAca	@VisitTheUSAca	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAcl	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
China	GoUSA.cn	即刻 定制 您的 USA 旅行计划	n/a	Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn Youku (YouTube equivalent): http://i.youku.com/gousacn Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局			
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAco	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAfr	@VisitTheUSAfr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAfr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUSAde	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAde
India	GoUSA.in	Plan Your USA Trip Now	facebook.com/GoUSAin	@GoUSAin	#VisitTheUSA	VisitTheUSA	YouTube.com/GoUSAin
Japan	GoUSA.jp	今すぐ USA への旅の計画を	facebook.com/GoUSAjp	@GoUSAjp	アメリカ旅行	VisitTheUSA	YouTube.com/GoUSAjp
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	facebook.com/VisitTheUSAmx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	facebook.com/GoUSAkr	@GoUSAkr	#미국여행	VisitTheUSA	YouTube.com/GoUSAkr
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUSAse	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Taiwan	GoUSA.tw	立即訂製專屬你的美國之旅	facebook.com/VisitTheUSA	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	facebook.com/VisitTheUSAuk	@VisitTheUSAuk	#VisitTheUSA	VisitTheUSA	YouTube.com/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 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural/Historical Attractions	58
Local Lifestyle	55
Shopping	45
Dining/Gastronomy	40
Visiting friends/relatives	37

Top 5 Strongest Impressions of the USA

Impression	% Selected
Adventurous	38
Diverse	36
Friendly	32
Energetic	29
Arrogant	26

Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply. Base: Australia Intercontinental travelers (N=1017)

Source: Brand USA Market Intelligence Study 2017.

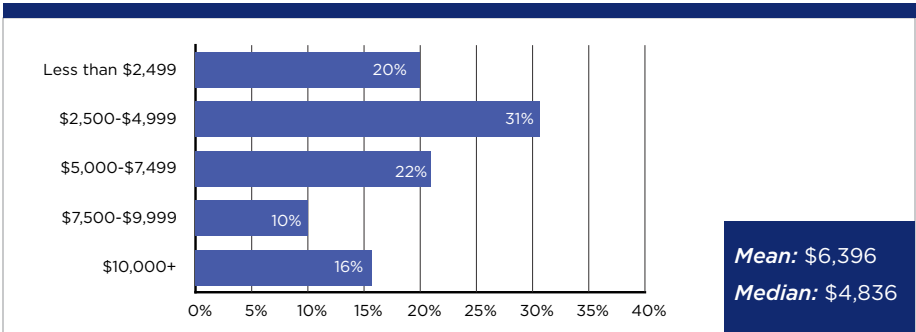
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	66%
Personal recommendations from family and friends	40%
Websites or applications via tablet	26%
Information in printed travel guidebooks	25%
Personal advice from travel professionals/travel agents	23%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Australia Intercontinental travelers 2016 (N=107)

Source: Brand USA Market Intelligence Study 2017.

Expected Household Travel Spend for Next Intercontinental Trip

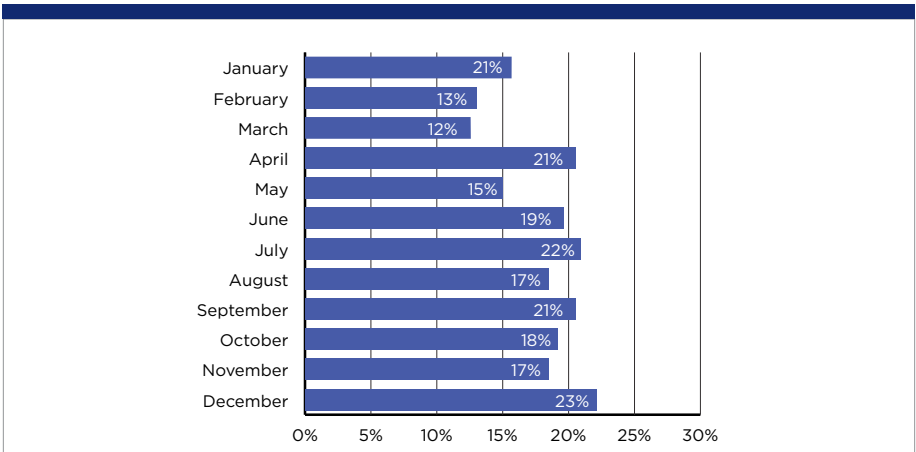


Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.

Base: Australia Intercontinental travelers 2016 (N=1017) Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017. (Conversion AUD to USD=0.812)

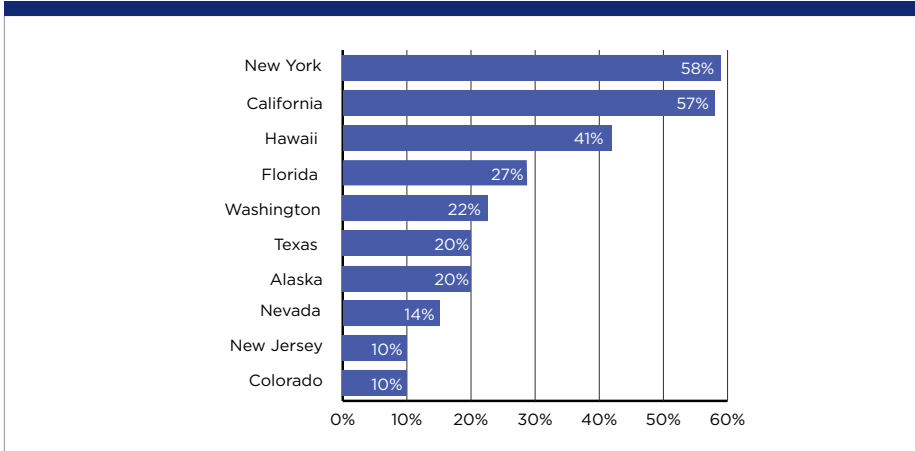
Months Traveled (April 2015-April 2017)



Question: During what month(s) did you take your holiday(s)? Base: Australia Intercontinental travelers 2016 (N=1017)

Source: Brand USA Market Intelligence Study 2017.

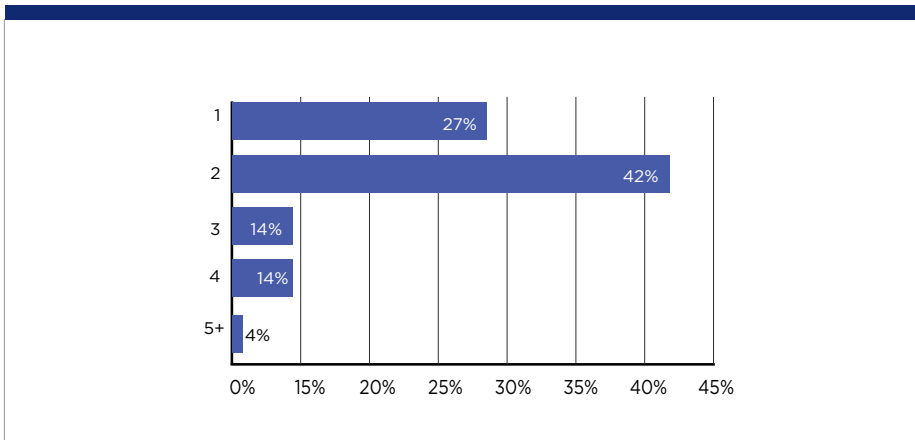
Destination Interest—Top 10 States



Question: You indicated in a previous question that you have interest in visiting the U.S. some time in the future. Which U.S. state(s) are you interested in visiting? Base: Australia Intercontinental travelers with interest in visiting the United States (N=1017).

Source: Brand USA Market Intelligence Study 2017.

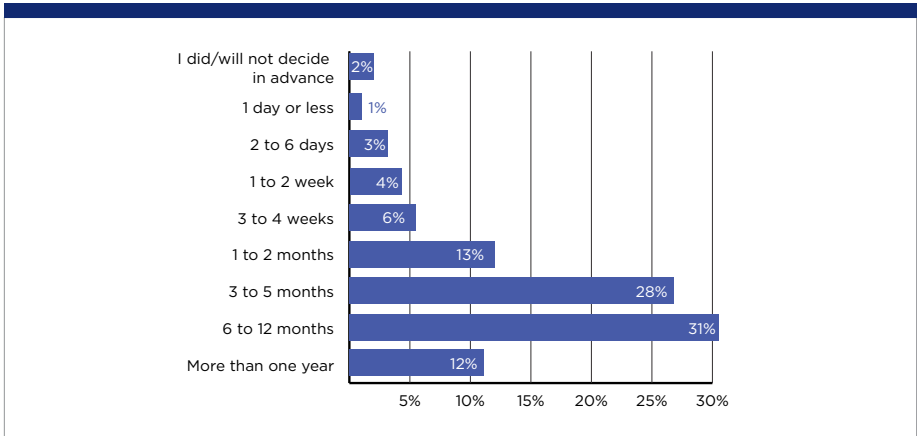
Expected Travel Party Size of Next Intercontinental Trip



Question: How many people in your household will go on this trip? Please count yourself as 1.
Base: Australia Intercontinental travelers 2017 (N=1017) Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

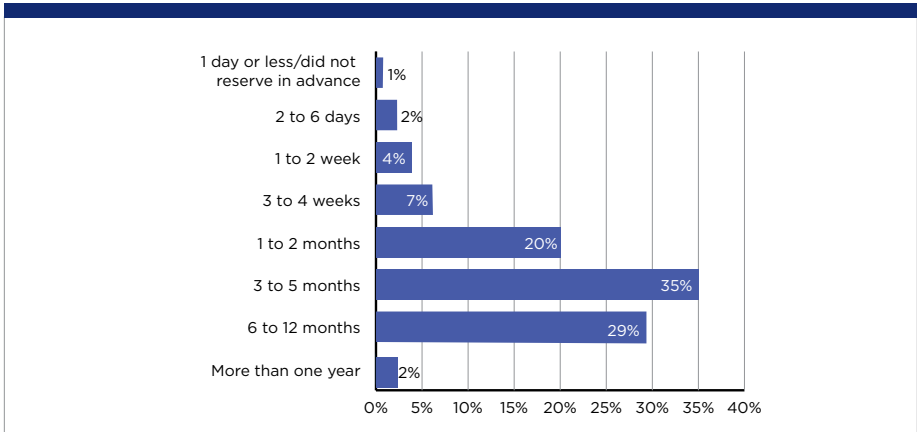
Destination Decision for Next Intercontinental Trip



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

Source: Brand USA Market Intelligence Study 2017.

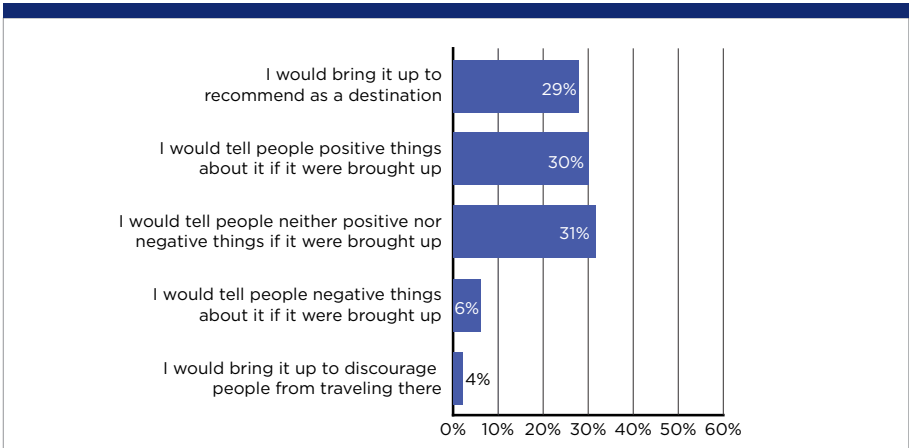
Air Booking for Next Intercontinental Trip



Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions. 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: Australia intercontinental travelers who booked /will likely book air travel (N=719). Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

Net Promoter

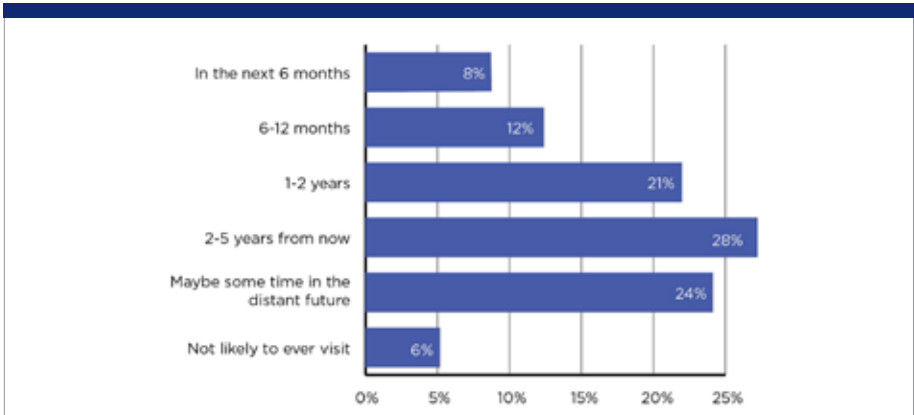


Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?

Base: Australia Intercontinental travelers 2016 (N=1030) Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

Likelihood of Travel to the USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Base: Australia Intercontinental travelers 2017 (N=1030).

Source: Brand USA Market Intelligence Study 2017.

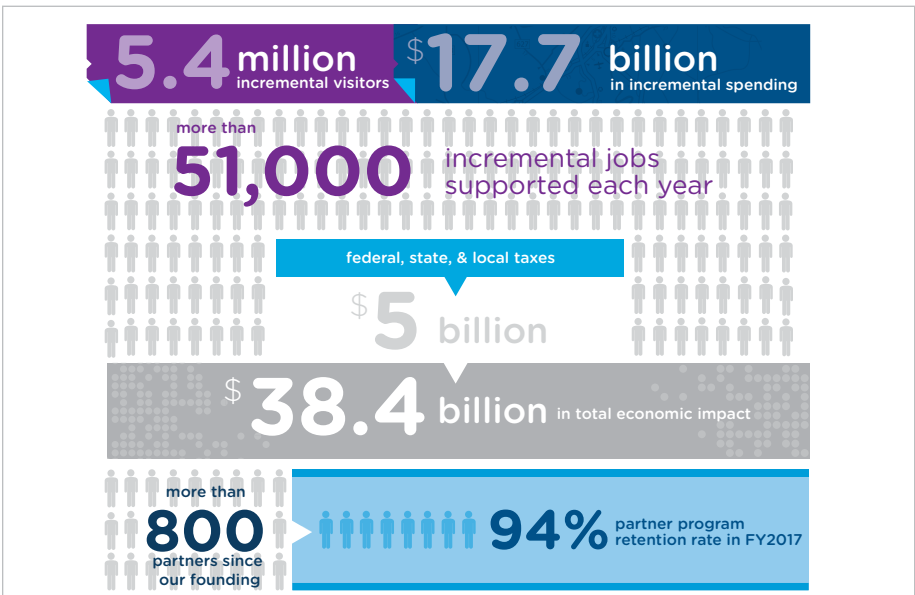
Brand USA Highlights

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 800 partners worldwide.

Here is some of what we've accomplished with the support of our partners since we began operations in 2011:

- Generated 5.4 million incremental international visitors to the USA over the past five years, which has benefited the U.S. economy with \$38.4 billion in total economic impact, and supported more than 51,000 incremental jobs a year (source: Oxford Economics).



Sources: ROI data provided by Oxford Economics.

Partner and partner program retention data provided by Brand USA internal reporting.

- Increased active consumer engagement with Brand USA assets (website page views, social interaction and social ad engagement) by 29 percent in FY2017.
- Continued to execute the USA consumer campaign in 14 markets (Australia,

Brazil, Canada, Chile, China, Colombia, France, Germany, India, Japan, South Korea, Mexico, Sweden, and the United Kingdom Colombia and Sweden). In total, these markets generate more than 80 percent of all international visitation to the United States.

- With the launch of a “social first” storytelling approach in 14 markets, including OOH, OLV, digital display, social, search, native, and influencer media, the “GO” campaign resulted in almost 6.5 billion impressions.
- Brought 23 percent more members of the travel trade to the USA via our three MegaFams, which included 287 travel agents (of which 49 were product developers) from three countries (China, United Kingdom & Ireland, and Mexico).
- Hosted three sales missions (to India, Japan/Korea and China) with 108 U.S. delegates who promoted their travel brands and destinations to more than 1,618 Buyers.
- Leveraged \$52.5 million in contributed media from 35 global media partners, plus an additional \$5.7 million of in-kind contributions, to promote travel to the USA directly to consumers in numerous international markets. This compares to \$49 million in contributed media from 29 global media partners in FY2016.
- Increased earned media exposure for corporate media relations efforts by 41 percent over FY2016, reaching 2.7 billion impressions and an ad equivalency of nearly \$230 million in FY2017.
- Generated more than \$100 million in industry contributions, including cash contributions of \$43.5 million (compared to \$53 million in FY2016) and in-kind contributions of \$66.3 million (compared to \$47 million in FY2016) in recognized revenue—representing 40 percent in cash contributions and 60 percent in in-kind contributions for the year.
- Grew Brand USA’s partnership network from 707 in FY2016 to 851 partners through FY2017 (a 20 percent increase).

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:

- Argentina
- Australia
- Austria
- Bahamas
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- France
- Germany
- Guatemala
- Honduras
- Hong Kong
- India
- Ireland
- Italy
- Japan
- South Korea
- Mexico
- Netherlands
- New Zealand
- Nicaragua
- Norway
- Panama
- Peru
- Qatar
- Russia
- Singapore
- Spain
- Sweden
- Switzerland
- Taiwan
- Turkey
- United Arab Emirates
- United Kingdom
- Venezuela

Visit USA Committees, Australia and New Zealand

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 and consumer fairs, workshops and programs for travel agents, newsletters, and more.

Visit USA committees are 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, in markets where Brand USA has established international representation and in select markets where the organization is not currently represented.

Visit USA Committee Contacts:

Visit USA Committee, Australia

Lucy Rowe

President

president@visitusa.org.au

Clinton White

Secretariat

secretariat@visitusa.org.au

Visit USA Committee, New Zealand

Corey Marshall

Chair

Corey@canuckiwi.com

Claire Reynolds

Vice Chair

Clreynolds@hertz.com

About the U.S. Commercial Service

The U.S. Commercial Service (USCS) is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration (ITA). 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 service 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. Our specialists in Australia and New Zealand can be reached at the contact details below.

Contact:

Australia

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Senior Commercial Specialist
+61 2 9373 9210
monique.Roos@trade.gov

New Zealand

Janet Coulthart
Commercial Specialist
Head of Section
+ 64 4 462-6002
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Our Partnership with the U.S. Department of Commerce

Brand USA collaborates closely with the International Trade Administration, U.S. Department of Commerce, through its National Travel and Tourism Office (NTTO) and U.S. Commercial Service Offices in international markets.



In addition, Brand USA works in close partnership with Visit USA committees in market and more than 800 contributing partners throughout the world to implement highly successful campaigns that are inspiring an increasing number of travelers to visit the USA.

The National Travel and Tourism Office (NTTO)

The NTTO is the federal liaison to 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 partners.

The NTTO also serves as the official source of national travel and tourism statistics to inform policy and private-sector decision making. These data are used by the Bureau of Economic Analysis to calculate the balance of payments for travel and tourism and measure the economic impact of international visitation to the United States. Furthermore, NTTO advances policies that support travel and tourism export growth and addresses export barriers in key international markets.

Contact:

The NTTO is located in the International Trade Administration of the Department of Commerce.

14th & Constitution Avenue, NW,

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202.482.0140

ntto@trade.gov

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