



Brand USA

Market Information 2018 FRANCE



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 economy in France along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

TABLE OF CONTENTS

About Brand USA.....	4
A Message from Christopher L. Thompson.....	5
Brand USA Executive and Senior Leadership.....	7
Geography.....	8
Demographics	8
Economy	9
International Visitation Trends	11
Travel Trends.....	12
Traveler Characteristics.....	13
Air Travel Information.....	16
Market Snapshot	18
Brand USA Traveler Research	22
Brand USA Online Channels.....	25
Brand USA Highlights	30
Brand USA Markets	32
Visit USA Committee, France.....	33
About U.S. Commercial Service	34
Our Partnership with U.S. Department of Commerce	35
About the National Travel & Tourism Office	35

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 destination-marketing organization for the United States — look forward to working with you to tap the great potential of the outbound-tourism market in France.



This guide will familiarize you with the factors that make this regional market so desirable to cultivate. It is interesting to note, for example, that French workers have a minimum of five weeks of paid holidays. Travel, for the French, is a valued endeavor.

By itself, France, in 2016, was the ninth-largest source market among international arrivals in the United States, according to the National Travel and Tourism Office. More than 1.6 million travelers from France visited that year.

To enhance our presence across Europe, we have been working with Hills Balfour, a distinguished, global public-relations and representation company, since the start of 2018. And, to better support Brand USA's mission and messaging in France, Hills Balfour has aligned its efforts with Interface Tourism France.

We launched two major outreach initiatives during the first half of 2018. One is our new giant-screen film, "America's Musical Journey." Since its release in February, the film has been a significant promotional element 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.

Another major, ongoing effort is Brand USA's new travel-entertainment TV channel, GoUSA TV, which also launched in February. 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. And, GoUSA TV will add French-language content in the near future.

Brand USA, overall, 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 is relevant, engaging and authentic.

I invite you to talk to our team about the opportunities that await to boost your marketing in this part of Europe. They can discuss with you the most effective ways to inspire travelers from this region to book their trips to the USA now.

In September, for instance, Brand USA and a contingent of its industry partners will showcase the USA as a premier global destination at the 40th annual IFTM Top Resa in Paris. Just over 32,000 members of the travel trade are expected to be at this yearly event. Top Resa is a wide-ranging exposition that features all categories of travel: leisure, business, MICE and group.

The day before Top Resa, the annual International Media Marketplace also takes place in Paris. More than 2,500 members of the international media will have one-on-one meetings with 1,400 exhibitors representing travel brands around the world – all during a single day.

Together, we are marketing the USA!

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President & CEO

Brand USA

Brand USA

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Geography

Area

France

643,801 km²

Source: CIA World Factbook 2018

Demographics

Population

France

67,186,638

Source: CIA World Factbook 2018

Largest Metropolitan Areas

France

Paris: 12.405 million (capital)

Lyon: 2.237 million

Marseille-Aix-en-Provence: 1.734 million

Toulouse: 1.291 million

Bordeaux: 1.178 million

Source: CIA World Factbook 2018

Population by Age

Age	USA	France	Luxembourg	Belgium
0-14 years	18.73%	18.53%	16.77%	17.16%
15-24 years	13.27%	11.79%	12.18%	11.34%
25-54 years	39.45%	37.78%	44.27%	40.05%
55-64 years	12.91%	12.42%	11.77%	12.86%
65 years and older	15.63%	19.48%	15.02%	18.58%
Median age	38.1 years	41.4 years	39.3 years	41.4 years
Population growth rate	0.81% (2017 est.)	0.39% (2017 est.)	1.98% (2017 est.)	0.7% (2017 est.)

Source: CIA World Factbook 2018

Economy

France

GDP: \$2.826 trillion (2017 est.)

GDP real growth rate: 1.9% (2017 est.)

GDP—per capita: \$43,600 (2017 est.)

Unemployment rate: 8.9% (2017 est.)

Inflation rate: 1.2% (2017 est.)

Source: CIA World Factbook, 2018

Vacation Allocation and Public Holidays

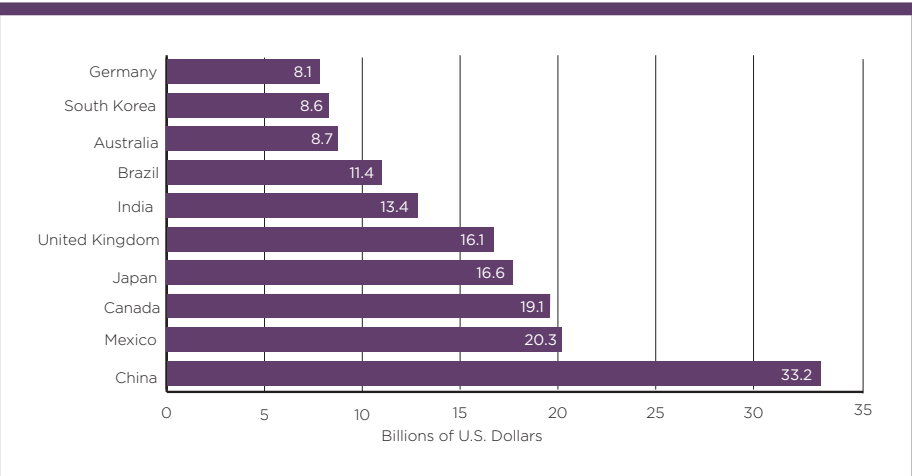
French are among the world champions for holidays! French get a minimum of 5 weeks of paid holidays + 11 public holidays + “RTT” days (additional days off) for those working 39h/week in the public sector and for some private companies.

Primary Travel Periods and Public School Holidays:

- Winter Holidays: Two weeks in February or March
- Easter holidays: Two weeks in April
- Summer holidays: Six weeks of school holidays, July to August
- Fall holidays: Two weeks Late October
- Christmas holidays: Two weeks in December

International Visitation Trends*

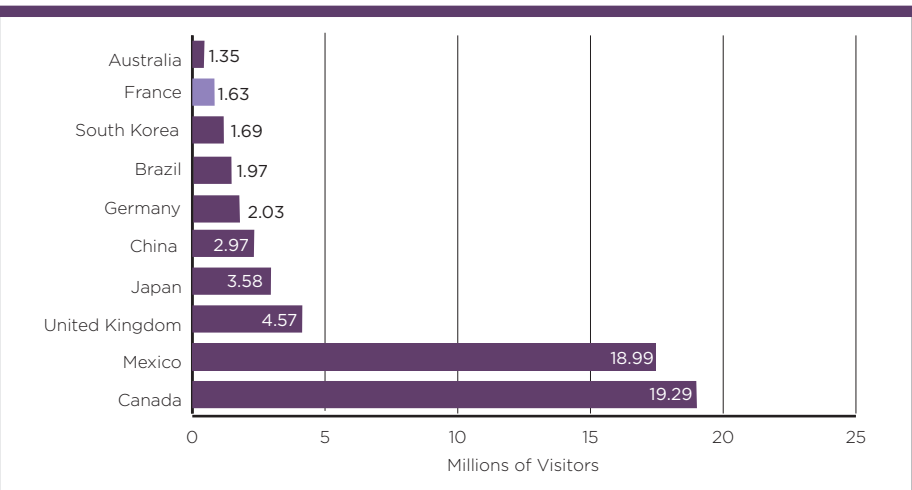
Visitor Spending 2016 (billions of U.S. dollars)



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

International Arrivals to the USA, 2016

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



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

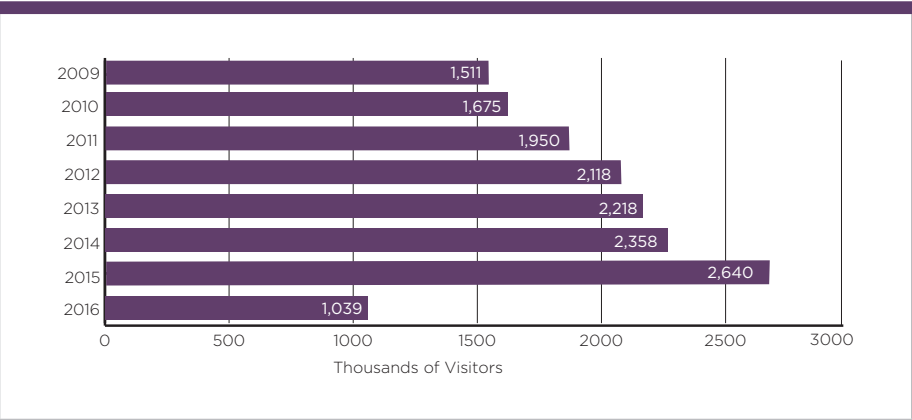
Travel Trends*

Spending Trends (exports) of the French in the USA
(millions of U.S. dollars)

	2009	2010	2011	2012	2013	2014	2015	2016	Change
Total Travel & Tourism Exports	\$4,098	\$4,424	\$5,470	\$5,023	\$5,501	\$6,151	\$6,489	\$5,983	\$1,885
Travel Receipts	\$3,172	\$3,488	\$4,309	\$3,790	\$4,219	\$4,723	\$5,104	\$4,730	\$1,558
Passenger Fare Receipts	\$926	\$936	\$1,161	\$1,233	\$1,282	\$1,428	\$1,385	\$1,253	\$327
Change (%) in Total Exports	-10	8	24	-8	7	9	5	-8	46

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

Visitation Trends (arrivals)—(thousands of visitors)



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
Vacation/Holiday	63	59	-3.2
Visit Friends/Relatives	17	20	3.1
Business	12	11	-1.2
Convention/Conference Tradeshow	5	7	1.4
Education	2	3	0.5
Religion/Pilgrimages	0.4	0.0	-0.4
Health Treatment	0.1	0.1	0.0
Other	0.4	0.1	-0.3

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

All Purposes of Trip

All Purposes of Trip	2015 (%)	2016 (%)	Point Change
Vacation/Holiday	71	70	-1.2
Visit Friends/Relatives	28	29	1.2
Business	15	14	-0.9
Convention/Conference/Tradehow	6	9	2.3
Education	3	4	1.4
Religion/Pilgrimages	1	0.2	-0.3
Health Treatment	0.1	0.1	0.0
Other	0.4	1	0.1
Net Purposes Of Trip:			
Leisure & VFR	83	83	-0.8
Business & Convention	20	21	1.0

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

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

Select Traveler Characteristics

Traveler Characteristics	2015	2016	Change
Length of Stay in U.S. (mean nights)	15.7	15.9	0.2
Length of Stay in U.S. (median nights)	10	10	0.0
First International Trip to the U.S.	28	24	-3.5

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

Activity Participation While in the USA

Activities	2015 (%)	2016 (%)	Point Change
Shopping	86	85	-1.7
Sightseeing	78	78	0.6
National Parks/Monuments	48	50	2.0
Experience Fine Dining	46	28	-18.7
Art Gallery/Museum	42	42	-0.4
Small Towns/Countryside	33	28	-4.7
Historical Locations	30	30	-0.3
Amusement/Theme Parks	26	25	-1.1
Guided Tours	22	21	-1.2
Cultural/Ethnic Heritage Sites	21	19	-1.8

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

USA Destinations Visited (States, Cities and Regions)

U.S. Destinations/Regions	Market Share 2015 (%)	Volume 2015 (000)	Market Share 2016 (%)	Volume 2016 (000)
Regions				
Middle Atlantic	43.29	759	42.66	695
Pacific	**	**	29.53	481
States/Territories				
New York	40.89	717	40.11	653
California	**	**	28.03	456
Cities				
New York City	40.42	708	39.78	648

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

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

Transportation Used in the USA

Transportation Types	2015 (%)	2016 (%)	Point Change
City Subway/Tram/Bus	43	46	3.3
Rented Auto	35	35	0.3
Taxicab/Limousine	31	30	-1.0
Auto, Private or Company	29	28	-1.1
Air Travel between Cities	20	20	-0.5
Bus between Cities	15	13	-1.9
Ferry/River Taxi/Short Scenic Cruise	17	16	-0.7
Railroad between Cities	6	8	2.5
Rented Bicycle/Motorcycle Moped	3	5	1.8
Cruise Ship/River Boat 1+ Nights	5	4	-0.9
Motor Home/Camper	1	1	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

Flights from France to the USA

Direct flights

Air France KLM:

- All year long flights: New York, Atlanta, Boston, Detroit, Houston, Los Angeles, Miami, San Francisco, Washington
- Seasonal flights: Chicago, Minneapolis, Seattle
- Code share with Delta Airlines (all year long and seasonal flights)

Air Tahiti Nui: Los Angeles

American Airlines:

- All year long flights: Dallas, Miami, Philadelphia, New York City
- Seasonal flights: Boston, Charlotte, Chicago

Delta Airlines:

- All year long flights: New York City, Atlanta, Cincinnati, Seattle, Pittsburgh, Philadelphia, Chicago, Boston, Raleigh, Durham, Minneapolis, Salt Lake City, Detroit, Indianapolis

Norwegian Airlines:

- All year long flights: New York City, Los Angeles, Fort Lauderdale, Orlando
- + flights with stop over: Baltimore/Washington, Boston, Las Vegas, New York, Oakland/San Francisco, Orlando.

United:

- All year long flights: New York City, Chicago, San Francisco, Washington DC

XL Airways:

- Seasonal flights: New York City, Miami, San Francisco, Los Angeles

Flights with stop over

Aer Lingus (via Dublin – all year long and seasonal flights):

- New York City, Boston, Chicago, Washington, Los Angeles, San Francisco, Orlando, Miami

Air Europa (via Madrid – all year long and seasonal flights):

- New York City, Boston

Condor (via Frankfurt or Munich – all year long and seasonal flights):

- Las Vegas, Seattle, Baltimore, Minneapolis, Austin, Portland, Anchorage, Fairbanks, New Orleans, San Diego

Icelandair (via Reykjavik – all year long and seasonal flights):

- New York City, Boston, Chicago, Denver, Minneapolis, Orlando, Seattle, Washington D.C., Anchorage, Portland, Philadelphia, Tampa

Norwegian Airlines (see above)

Virgin Atlantic (via London, with British Airways from France to London – all year long and seasonal flights):

- New York City, Atlanta, San Francisco, Los Angeles, Boston, Miami, Las Vegas

Market Snapshot

Snapshot: France

1. The French regional specificities:

While the sole Paris region accounts for 19% of the French overall metropolitan population (12 million inhabitants), other French regions play an important role in the French economy for several reasons:

- A well established and developed domestic transportation system, spreading flows easily across France and facilitating access to regional cities
- A revised administrative mapping voted in 2015 (called “Territorial Reform”), which resulted in the merging of several French regions together, thus boosting their size, demographics and economy

2. The importance of Leisure on the French market:

French paid holidays: A minimum of 5 weeks of paid holidays + 11 public holidays + “RTT” days (additional days off) for those working 39h/week in the public sector and for some private companies. French are among the world champions for holidays!

Holiday departure rate has been constantly increasing since 2010 until to date, reaching an average departure rate of 62 % in 2016, and even 86 % for households with the highest revenues.

France economic and security context explains such high figure: high level of terrorism in France; social riots against working reforms... are part of the reasons why French travelled abroad in 2016.

Travel trends experts indeed point out that “travelling is a therapy.

French travel to recharge batteries, gather with their family, and reassure themselves from anxious daily lives”.

Which criteria will be decision maker: #1 Weather, #2 Security, #3 Budget

What are French people looking for: Landscapes, Culture and heritage, Authenticity, Gastronomy

French people activities in holidays: 77% sightseeing, 45% eating out, 38% relaxing, 26% entertainment, 24% shopping, 9% sport

How do French People get inspired: 43% check online travel agencies, 41% ask family, friends or colleagues, 27% check airlines or hotels websites, 27% read guide books, 24% ask to travel trade, 19% check social media, 18% read press (online or offline), 16% check tourism association, 16% watch TV

3. The French travel booking and purchasing trends and methods:

The traditional “linear” distribution and booking system (local DMCs, Airlines, Hotels -> Tour-Operators and Wholesalers -> Travel Agencies & Retailers -> Clients) no longer prevails. Over the past ten years, Internet drastically changed the distribution process: the former straightforward travel booking patterns are now challenged by a more complex system, where consumers can connect directly online to every supplier. As a result, the distribution market is very fragmented and requires a multi-angle approach when implementing B2B development and sales strategies: 180 TO, plus many niche-specialists TOs (golf, diving, hiking...); 5.000 TA (70 % of them belonging to a network); 8 majors TA networks.

When it comes to long-haul travel, the preferred distribution channel however strongly varies depending on several criteria: Booking easiness (Easy-booking destination (flights + hotels) vs complex-trips (circuits + specific interests), clients profile and age-group and Destination safety level. Direct online sales via airlines, hotel booking platforms, local DMCs, as well as OTAs, particularly apply to the younger generation of travelers; especially in safe destinations, with easy booking tools.

The traditional distribution system (wholesalers and retail agents) still play a major role in many cases: for destinations perceived as complex to be self-organized; for travelers with special interests looking for the expertise of a travel agent (honeymooners; divers); for high-spending travelers (luxury segment; senior segment).

Only few TO can generate volume. It's key to focus on those who have specialist/expert sellers by geographic area to optimize sales conversions, as well as on those able to sell niche products. Online Travel Agencies, popular sales channels for flights, also sell dynamic packages and referenced TOs' packages in white label. Among TA networks, leading ones (campaigns ROI, expertise of sellers) are Leclerc Voyages, Carrefour Voyages and Havas Voyages. Rumors of a coming merge between major

TA networks may also deeply modify the distribution landscape in the coming months. The French market evolves very quickly and it's essential to always be informed about (and even forecast) those movements, with strong relationships with management of key players.

4. The main French Travel trade trends:

- Strong consolidation of tourism actors: TA networks, TOs and OTAs
- New way to sell travels: without knowing the destination by experiences, for women travelling alone, for thirty-year-old people, last minute
- Airlines package products with or without stopover
- Production of TOs and OTAs more and more externalized

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.fr), 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
- 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 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/VisitTheUSAc	@VisitTheUSAc	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	fr/VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAc	@VisitTheUSAc	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUS Afr
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://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/VisitTheUSAc	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUS Afr	@VisitTheUS Afr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUS Afr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUS Ade	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUS Ade
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/VisitTheUS Amx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	facebook.com/GoUS Ak r	@GoUS Ak r	#미국여행	VisitTheUSA	YouTube.com/GoUS Ak r
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUS Ase	@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/VisitTheUS Auk	@VisitTheUS Auk	#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
Local Lifestyle	56
Cultural Historical Attractions	54
Urban Attractions	40
Dining/Gastronomy	40
Ecotourism and nature	37

Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	46
Adventurous	30
Trendy	29
Forward-thinking	29
Open-minded	27

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: France intercontinental travelers (N=1044).

Source: Brand USA Market Intelligence Study 2018

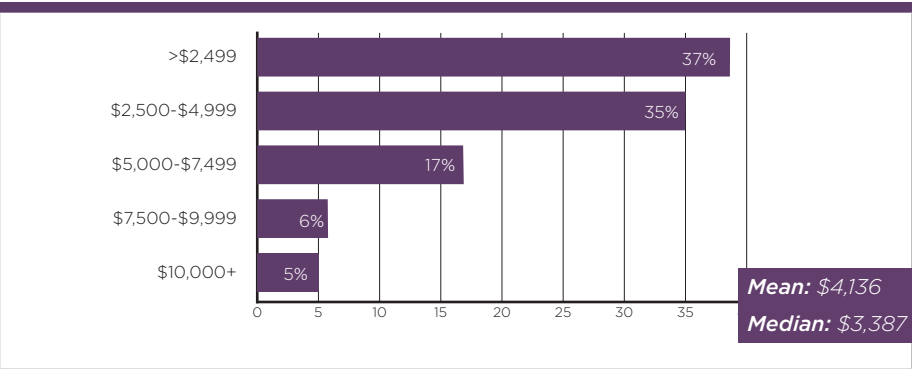
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via computer or laptop	54
Personal recommendations from friends and family	34
Websites or applications via tablet	29
Information in print travel guidebooks	28
Websites or applications via mobile phone	27

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: France intercontinental travelers (N=1044).

Source: Brand USA Market Intelligence Study 2018

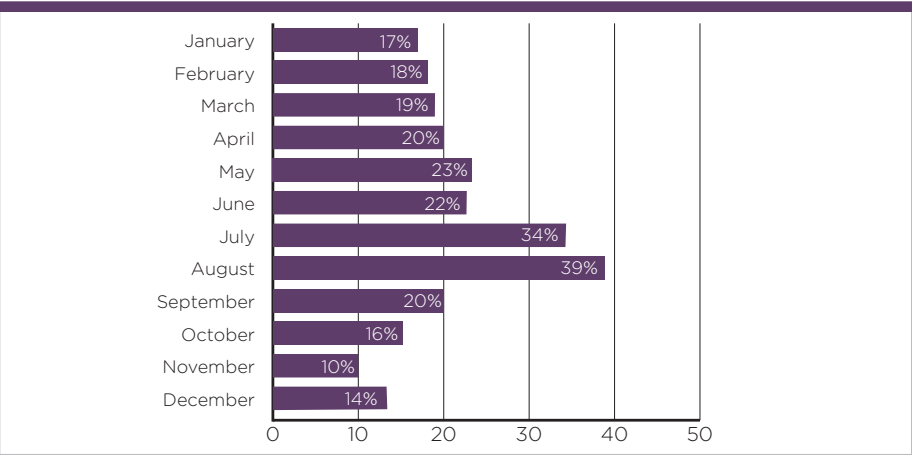
Expected Household Travel Spend for Next Intercontinental Trip



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: France Intercontinental travelers (N=1044).

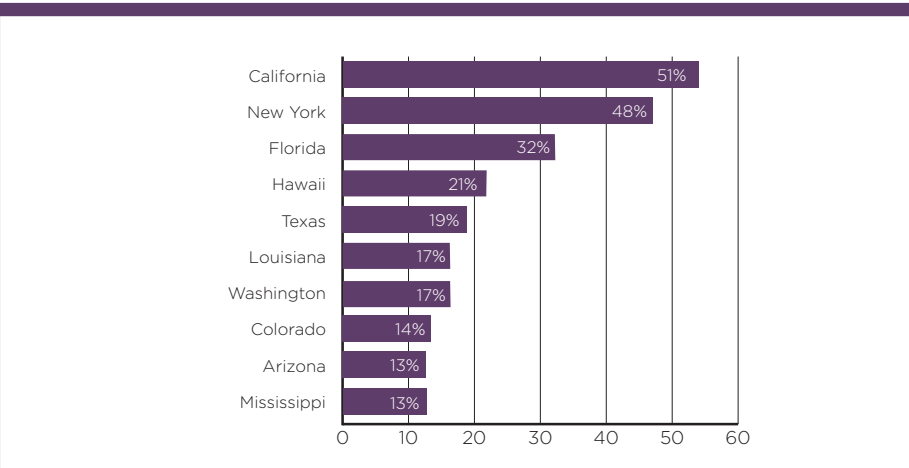
Source: Brand USA Market Intelligence Study 2018

Months Traveled (March 2016–March 2018)



Question: During what month(s) did you take your holiday(s)? Base: France intercontinental travelers (N=1044). Source: Brand USA Market Intelligence Study 2018

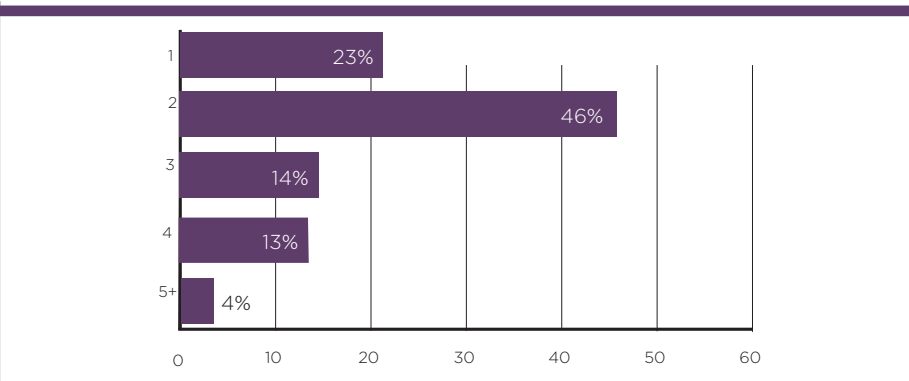
Destination Interest—Top 10 States



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: France intercontinental travelers who are interested in visiting the USA

Source: Brand USA Market Intelligence Study 2018

Expected Travel Party Size of Next Intercontinental Trip

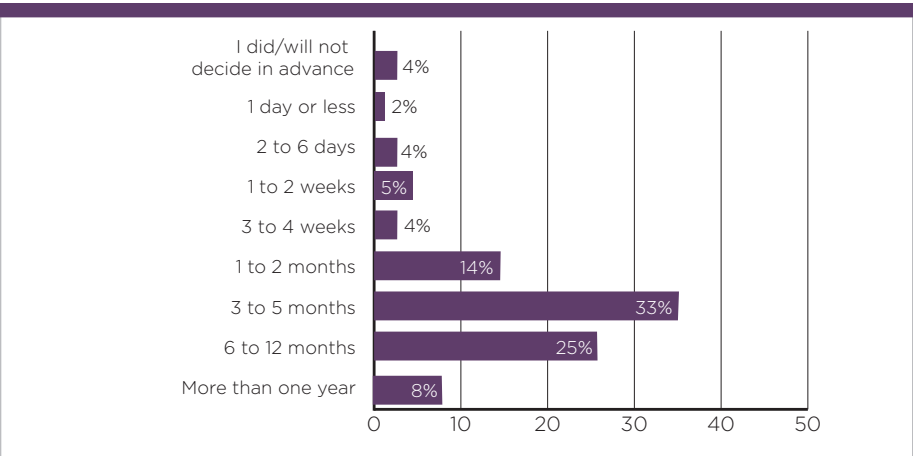


Question: How many people in your household will go on this trip? Please count yourself as 1. Base: France intercontinental travelers (N=1044).

Source: Brand USA Market Intelligence Study 2018

Destination Decision and Air Booking for Next International Trip

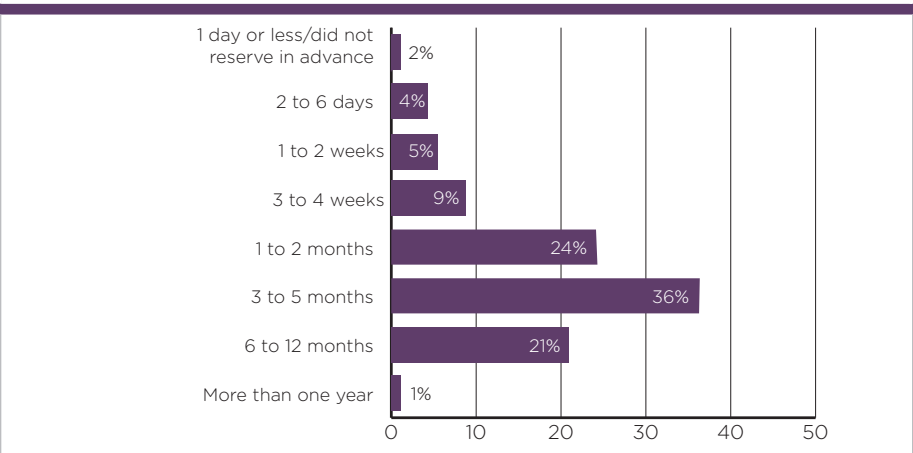
Destination Decision



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. Base: France intercontinental travelers (N=1044).

Source: Brand USA Market Intelligence Study 2018.

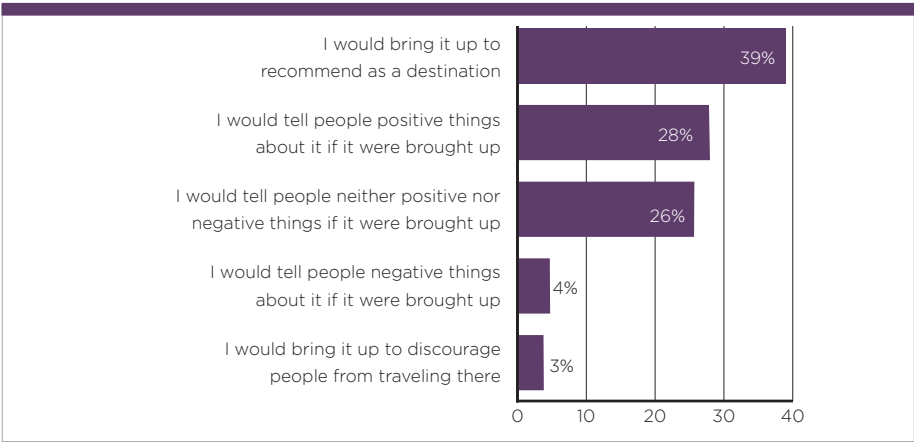
Air Booking



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: France intercontinental travelers who booked/will likely book air travel.

Source: Brand USA Market Intelligence Study 2018

Net Promoter

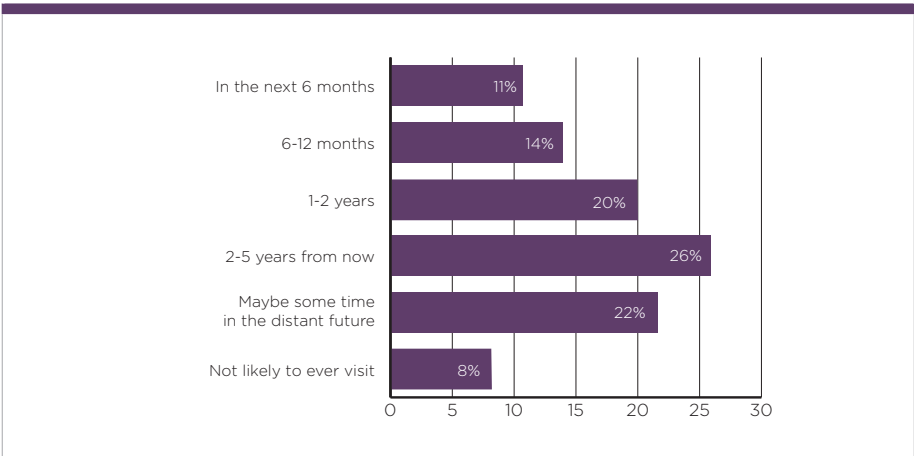


Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?

Base: France intercontinental travelers (N=1044).

Source: Brand USA Market Intelligence Study 2018

Likelihood of Travel to USA



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

Base: France intercontinental travelers (N=1044).

Source: Brand USA Market Intelligence Study 2018

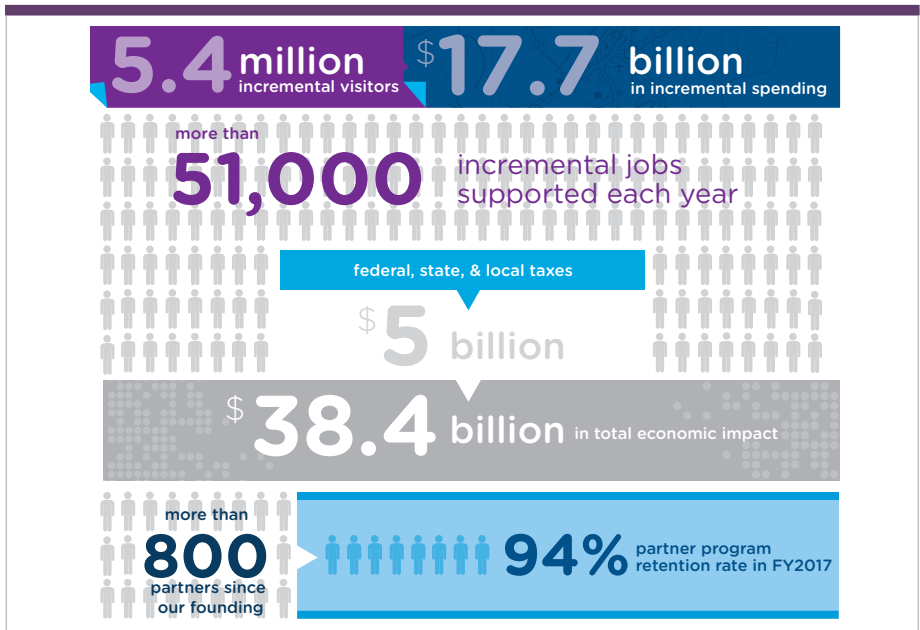
Brand USA Highlights

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 Committee, France

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

Contact:

Visit USA Committee, France

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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 France can be reached at the contact details below. To search for a domestic trade specialist near you, visit www.export.gov.

Contact:

U.S. Commercial Service, France

Valérie Ferrière

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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.

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