



USA

VisitTheUSA.de

Brand USA

Market Information 2018

GERMANY, AUSTRIA & SWITZERLAND



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 Germany, Austria, and Switzerland, 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	9
Economy	10
Vacation Allocation	10
International Visitation Trends	11
Travel Trends.....	12
Traveler Characteristics.....	14
Air Travel Information.....	16
Market Profile	19
Brand USA Online Channels	26
Brand USA Traveler Research	29
Brand USA Highlights	34
Brand USA Markets.....	36
Visit USA Committees: Germany, Austria, Switzerland	37
About the U.S. Commercial Service.....	38
About the U.S. Department of Commerce.....	39
About the National Travel & Tourism Office.....	39

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 USA — look forward to working with you to generate business in the outbound-travel sectors of Germany, Austria, and Switzerland.



This guide will familiarize you with the factors that make these three countries important markets for international visitation to the USA.

During 2016, 2.03 million Germans traveled to the United States, according to the National Travel and Tourism Office. This allowed Germany to rank number-six among the top-10 source markets that sent international visitors to the United States. Those German travelers ranked number-10 among the top groups of international visitors. They spent \$2.03 million during their U.S. trips in 2016.

Also, 469,000 Swiss travelers and 220,000 Austrians came to the United States during 2016.

Demand for travel to the USA has remained strong, according to Germany's top tour operators, partly because of a strong euro. The Austrian market is similar, because most tour operations there are part of German-owned enterprises. In the Swiss market, the USA continues to be especially popular as a long-haul summer destination.

Recent research among German intercontinental travelers showed that 45 percent of respondents would recommend the USA as a travel destination without any prompting. Another 25 percent would say positive things if a discussion arose about the appeal of the United States as a destination.

Also, 19 percent of these German travelers, nearly one of every five, say they will travel to the USA within one to two years.

Earlier this year, Brand USA launched two major outreach initiatives. 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 started 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 German-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 trip experiences in the USA and opportunities to enhance your marketing efforts in Germany, Austria and Switzerland. They can discuss with you the most effective ways to inspire international travelers in this collective market to book their USA trips now.

This month, for instance, Brand USA and participating partners, were at IMEX Frankfurt. The three-day event typically draws about 4,000 hosted buyers and 5,000 trade visitors from approximately 90 countries. Total attendance for the event runs about 15,000 visitors.

Also of note, at the start of 2018, Brand USA appointed Hills Balfour to represent our interests in this market and across other parts of Europe. Hills Balfour, in turn, aligned with Lieb Management to work in-market on promoting U.S. travel.

Together, we are marketing the USA!

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President & CEO

Brand USA

Brand USA

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Geography

Area

Germany

357,022 sq km

Slightly smaller
than Montana

Austria

83,871 sq km

About the size of
South Carolina

Switzerland

41,277 sq km

Slightly less than
twice the size of New Jersey

Source: CIA World Factbook 2018



Climate

Germany

Temperate and marine; cool, cloudy, wet winters and summers; occasional warm mountain (foehn) wind.

Austria

Temperate; continental, cloudy; cold winters with frequent rain and some snow in lowlands and snow in mountains; moderate summers with occasional showers.

Switzerland

Temperate, but varies with altitude; cold, cloudy, rainy/snowy winters; cool to warm, cloudy, humid summers with occasional showers.

Source: CIA World Factbook 2018

Demographics

Population

Germany

80,594,017

Austria

8,754,413

Switzerland

8,236,303

United States

326,625,791

Source: CIA World Factbook 2018

Largest Metropolitan Areas

Germany

Berlin (capital): 3.563 million

Hamburg: 1.831 million

Munich: 1.438 million

Cologne: 1.037 million

Austria

Vienna (capital): 1.753 million

Switzerland

Zurich: 1.246 million

Bern (capital): 358,000

Population by Age

Age	USA	Germany	Austria	Switzerland
0-14 years	18.73%	12.82%	14.01%	15.16%
15-24 years	13.27%	10.09%	11.07%	10.88%
25-54 years	39.45%	40.45%	42.42%	43.21%
55-64 years	12.91%	14.58%	13.23%	12.6%
65 years and older	15.63%	22.06%	19.26%	18.15%
Median age	38.1 years	46.5 years	43.6 years	42.1 years
Population growth rate (2017 est.)	0.81%	-0.17%	0.55%	0.71%

Source: CIA World Factbook 2018

Economy

Germany

GDP: \$4.15 trillion

GDP real growth rate: 2.1%

GDP—per capita: \$50,200

Unemployment rate: 3.8%

Inflation rate: 1.6%

Austria

GDP: \$434.1 billion

GDP real growth rate: 2.3%

GDP—per capita: \$49,200

Unemployment rate: 5.4%

Inflation rate: 1.6%

Source: CIA World Factbook 2018

Switzerland

GDP: \$516.7 billion

GDP real growth rate: 1.0%

GDP—per capita: \$61,400

Unemployment rate: 3.0%

Inflation rate: 0.5%

Vacation Allocation

Vacation Allocation and Public Holidays

Salaried German employees earn an average of 28–32 days of paid vacation per year. Fortunate workers also receive either a thirteenth month salary and/or vacation bonus.

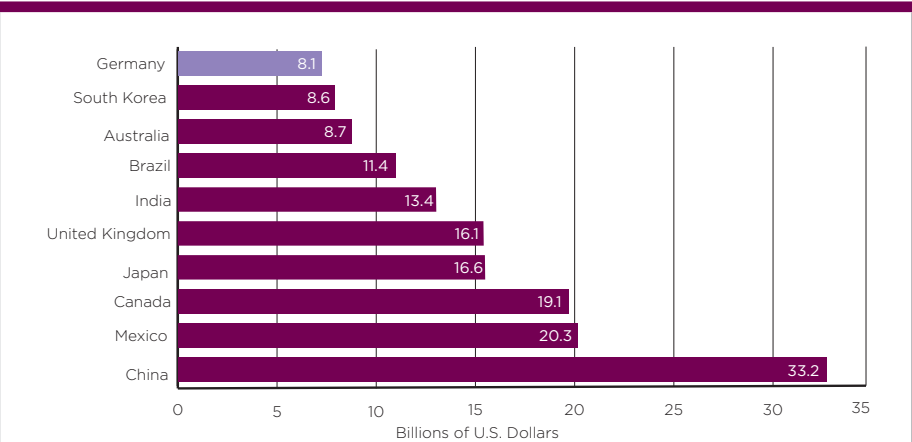
There are 10–14 public holidays, depending on the region of the country.

Primary Travel Periods and Public School Holidays

- **Easter holidays:** Two weeks in March and April
- **Summer holidays:** Six weeks of school vacation, July–August
- **Fall holidays:** Two weeks in October
- **Christmas holidays:** Two weeks in December and January

International Visitation Trends*

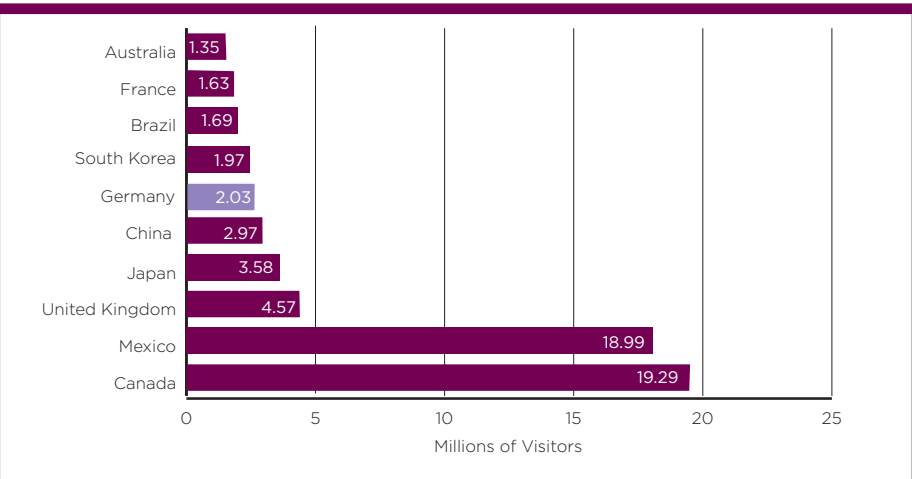
Visitor Spending, 2016 (billions of U.S. dollars)



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

International Arrivals to the USA, 2016

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



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

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

Travel Trends*

Data specific to the Austrian and Swiss market was not available in all instances.

Spending Trends (exports)—Germany (millions of U.S. dollars)

	2009	2010	2011	2012	2013	2014	2015	2016
Total Travel & Tourism Exports	\$5,792	\$6,585	\$7,061	\$7,456	\$7,664	\$8,295	\$8,961	\$8,064
Travel Receipts	\$4,699	\$5,363	\$5,629	\$5,887	\$6,023	\$6,440	\$7,155	\$6,456
Passenger Air Transport	\$1,093	\$1,222	\$1,432	\$1,578	\$1,641	\$1,855	\$1,806	\$1,608
Change (%) in Total Receipts	-19	-14	7	6	3	8	8	-10

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

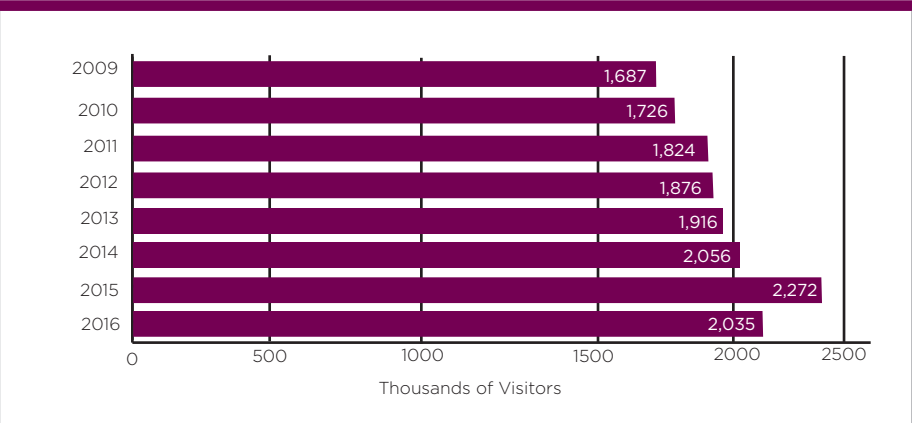
Spending Trends (exports)—Switzerland (millions of U.S. dollars)

	2009	2010	2011	2012	2013	2014	2015	2016
Total Travel & Tourism Exports	\$1,895	\$1,713	\$2,246	\$2,567	\$2,580	\$2,712	\$2,805	\$2,614
Travel	\$1,575	\$1,348	\$1,734	\$2,058	\$1,864	\$1,919	\$2,029	\$1,859
Passenger Air Transport	\$320	\$365	\$512	\$518	\$716	\$793	\$776	\$755
Change (%) in Total Exports	18	18	31	15	0	5	2	-7

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

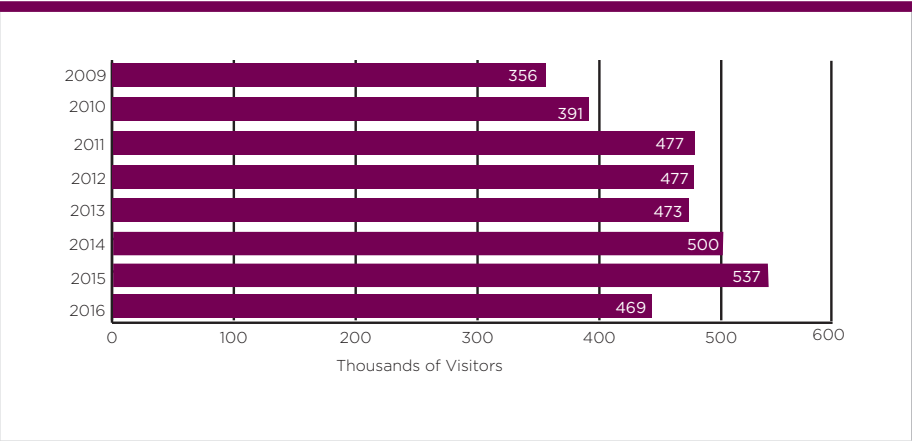
*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Visitation Trends (arrivals)—Germany



Source: U.S. Department of Commerce, National Travel & Tourism Office. 2015 International Visitation Reports are currently being revised.

Visitation Trends (arrivals)—Switzerland



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

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

Traveler Characteristics*

All Purposes of Trip

All Purposes of Trip	2015 (%)		2016 (%)		Point Change	
	Germany	Switz.	Germany	Switz.	Germany	Switz.
Vacation/Holiday	70	74	71	71	0.5	-3.5
Visit Friends/Relatives	33	34	32	26	-1.0	-8.2
Business	14	12	16	15	1.4	3.3
Convention/Conference/Trade Show	8	7	8	13	-0.72	6.5
Net Purposes of Trip:						
Leisure & Visit Friends and Relatives	83	87	82	79	-0.7	-8.2
Business & Convention	21	17	21	26	0.6	9.4

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

Select Traveler Characteristics

Traveler Characteristics	2015		2016		Point Change	
	Germany	Switz.	Germany	Switz.	Germany	Switz.
Length of Stay in U.S. (mean nights)	19.0	15.5	19.1	18.2	0.1	2.7
Length of Stay in U.S. (median nights)	12	10	12	10	0.0	0.0

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

Activity Participation While in the USA

Activities	2015 (%)			2016 (%)			Point Change		
	Ger.	Switz.	Eur.	Ger.	Switz.	Eur.	Ger.	Switz.	Eur.
Shopping	87	89	86	86	84	85	-0.9	-4.2	-0.9
Sightseeing	81	71	80	81	75	80	-0.5	-4.4	0.4
Small Towns/Countryside	45	40	34	45	39	33	0.0	-1.0	-1.1
National Parks/Monuments	45	44	43	47	38	44	1.8	-6.2	1.5
Historical Locations	39	30	33	40	27	33	0.8	-3.2	0.7
Experience Fine Dining	34	53	36	33	53	33	-1.4	-0.3	-3.4
Art Gallery/Museum	33	33	34	32	23	34	-0.9	-10.2	0.7
Guided Tours	26	24	27	23	23	28	-2.9	-0.6	0.9
Cultural/Ethnic Heritage Sites	20	21	18	20	16	18	0.1	-4.7	0.3
Amusement/Theme Parks	24	29	27	22	20	26	-2.0	-9.2	-1.0
Concert/Play/Musical	14	20	18	15	18	19	1.1	-2.0	1.0

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

U.S. Destinations Visited—Germany

U.S. Destinations/Regions	Market Share 2015 (%)	Volume 2015 (000)	Market Share 2016 (%)	Volume 2016 (000)
Regions				
South Atlantic	33.4	760	35.17	716
Middle Atlantic	33.5	761	33.9	690
Pacific	24.4	555	24.5	499
Mountain	15.5	353	14.9	304
States/Territories				
New York	30	682	30.1	614
Florida	21.8	497	23.0	469
California	21.8	497	22.1	451
Cities				
New York City	29.2	664	29.6	603
Miami	13.1	299	14.19	289

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

Transportation Used in the USA

Transportation Types	2015 (%)			2016 (%)			Point Change		
	Ger.	Switz.	Eur.	Ger.	Switz.	Eur.	Ger.	Switz.	Eur.
Rented Auto	49	48	36	50	43	35	1.1	-4.3	-1.4
City Subway/Tram/Bus	36	39	37	37	36	38	0.6	-1.0	1.4
Auto Private or Company	30	37	32	30	29	31	-0.5	2.6	-0.7
Air Travel between Cities	26	26	26	25	28	25	-0.9	2.1	-0.9
Taxicab/Limousine	27	27	36	26	44	35	-1.1	4.5	-0.3
Bus between Cities	15	13	14	14	15	14	-1.0	1.7	-0.6
Ferry/River Taxi/ Short Scenic Cruise	12	12	14	13	11	14	1.3	-1.3	0.2

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

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

Air Travel Information

Non-stop Flights from Germany to the USA

Airline	Flights from	Flights to	Plane	Frequency per week
American Airlines	FRA, Frankfurt	DFW, Dallas	Boeing 777-200	7
American Airlines	FRA, Frankfurt	CLT, Charlotte	Airbus A330-200	7
American Airlines	FRA, Frankfurt	PHL, Philadelphia	Airbus A330-200	7(until Oct. 28)
American Airlines	MUC, Munich	PHL, Philadelphia	Airbus A330-200	7
Delta Air Lines	FRA, Frankfurt	ATL, Atlanta	Boeing 767-300 ER	7
Delta Air Lines	FRA, Frankfurt	JFK, New York	Boeing 767-300 ER	7
Delta Air Lines	FRA, Frankfurt	DTW, Detroit	Boeing 767-300 ER	7
Delta Air Lines	STR, Stuttgart	ATL, Atlanta	Boeing 767-400 ER	7
Delta Air Lines	DUS, Düsseldorf	ATL, Atlanta	Boeing 767-400 ER	7
Delta Air Lines	MUC, Munich	ATL, Atlanta	Boeing 767-400 ER	7
Delta Air Lines	MUC, Munich	DTW, Detroit	Boeing 767-300 ER	7
Delta Air Lines	TXL, Berlin Tegel	JFK, New York	Boeing 767-300 ER	7
Condor	FRA, Frankfurt	ANC, Anchorage	Boeing 767-300	4
Condor	FRA, Frankfurt	AUS, Austin	Boeing 767-300	3
Condor	FRA, Frankfurt	BWI, Baltimore/ Washington	Boeing 767-300	4
Condor	FRA, Frankfurt	FAI, Fairbanks	Boeing 767-300	1
Condor	FRA, Frankfurt	LAS, Las Vegas	Boeing 767-300	4
Condor	FRA, Frankfurt	MSP, Minneapolis	Boeing 767-300	4
Condor	FRA, Frankfurt	MSY, New Orleans	Boeing 767-300	2
Condor	FRA, Frankfurt	PDX, Portland	Boeing 767-300	4
Condor	FRA, Frankfurt	PHX, Phoenix	Boeing 767-300	2
Condor	FRA, Frankfurt	PIT, Pittsburgh	Boeing 767-300	3
Condor	FRA, Frankfurt	SEA, Seattle	Boeing 767-300	7
Condor	FRA, Frankfurt	SJU, San Juan	Boeing 767-300	1
Eurowings	CGN Cologne -Bonn	RSW, Fort Meyers FL	Airbus A330	1
Eurowings	CGN Cologne -Bonn	SEA, Seattle	Airbus A330	2
Eurowings	CGN Cologne -Bonn	LAS, Las Vegas	Airbus A330	1
Eurowings	CGN Cologne -Bonn	LAS, Las Vegas	Airbus A330	2
Eurowings	MUC, Munich	RSW, Fort Meyers FL	Airbus A330	2
Eurowings	DUS, Duesseldorf	JFK, New York	Airbus A330	6
Eurowings	DUS, Duesseldorf	RSW, Fort Meyers FL	Airbus A330	3
Eurowings	DUS, Duesseldorf	MIA, Miami	Airbus A330	3

Airline	Flights from	Flights to	Plane	Frequency per week
Lufthansa German Airlines	DUS, Duesseldorf	EWB, Newark	Airbus A330	6
Lufthansa German Airlines	FRA, Frankfurt	JFK, New York	Boeing 747-800	7
Lufthansa German Airlines	FRA, Frankfurt	JFK, New York	Airbus 380	7
Lufthansa German Airlines	FRA, Frankfurt	EWB, Newark	Boeing 747-800	7
Lufthansa German Airlines	FRA, Frankfurt	IAD, Washington	Boeing 747-800	7
Lufthansa German Airlines	FRA, Frankfurt	IAD, Washington	Boeing 747-400	7
Lufthansa German Airlines	FRA, Frankfurt	BOS, Boston	Boeing 747-400	7
Lufthansa German Airlines	FRA, Frankfurt	BOS, Boston	Airbus A330	7
Lufthansa German Airlines	FRA, Frankfurt	PHL, Philadelphia	Airbus 340-400	7
Lufthansa German Airlines	FRA, Frankfurt	ORD, Chicago	Boeing 747-800	7
Lufthansa German Airlines	FRA, Frankfurt	ORD, Chicago	Boeing 747-800	7
Lufthansa German Airlines	FRA, Frankfurt	DFW, Dallas	Airbus 330	7
Lufthansa German Airlines	FRA, Frankfurt	IAH, Houston	Airbus 380	7
Lufthansa German Airlines	FRA, Frankfurt	DTW, Detroit	Boeing 747-400	7
Lufthansa German Airlines	FRA, Frankfurt	ATL, Atlanta	Airbus 330	7
Lufthansa German Airlines	FRA, Frankfurt	DEN, Denver	Boeing 747-400	7
Lufthansa German Airlines	FRA, Frankfurt	SFO, San Francisco	Airbus 380	7
Lufthansa German Airlines	FRA, Frankfurt	LAX, Los Angeles	Boeing 747-800	7
Lufthansa German Airlines	FRA, Frankfurt	LAX, Los Angeles	Airbus 340-600	7
Lufthansa German Airlines	FRA, Frankfurt	MCO, Orlando	Boeing 747-400	7
Lufthansa German Airlines	FRA, Frankfurt	MIA, Miami	Airbus 380	7
Lufthansa German Airlines	FRA, Frankfurt	TPA, Tampa	Airbus 340-400	5
Lufthansa German Airlines	FRA, Frankfurt	SEA, Seattle	Boeing 747-400	7
Lufthansa German Airlines	FRA, Frankfurt	SAN, San Diego	Airbus 340-400	5
Lufthansa German Airlines	MUC, Munich	SJC, San Jose	Airbus 340-400	5
Lufthansa German Airlines	MUC, Munich	JFK, New York	Airbus 340-600	7

Airline	Flights from	Flights to	Plane	Frequency per week
Lufthansa German Airlines	MUC, Munich	EWK, Newark	Airbus 340-600	7
Lufthansa German Airlines	MUC, Munich	IAD, Washington	Airbus 330	7
Lufthansa German Airlines	MUC, Munich	BOS, Boston	Airbus 350	7
Lufthansa German Airlines	MUC, Munich	CLT, Charlotte	Airbus 330	7
Lufthansa German Airlines	MUC, Munich	ORD, Chicago	Airbus 340-600	7
Lufthansa German Airlines	MUC, Munich	ORD, Chicago	Airbus 330	3
Lufthansa German Airlines	MUC, Munich	SFO, San Francisco	Airbus 340-600	7
Lufthansa German Airlines	MUC, Munich	LAX, Los Angeles	Airbus 380	7
Lufthansa German Airlines	MUC, Munich	DEN, Denver	Airbus 330	7
Singapore Airlines	FRA, Frankfurt	JFK, New York	Airbus 380	7
United Airlines	FRA, Frankfurt	ORD, Chicago	Boeing 777	14 (2x daily)
United Airlines	FRA, Frankfurt	IAD, Washington	Boeing 777	14 (2x daily)
United Airlines	FRA, Frankfurt	EWK, Newark	Boeing 777	7
United Airlines	FRA, Frankfurt	IAH, Houston	Boeing 777	7
United Airlines	FRA, Frankfurt	SFO, San Francisco	Boeing 777 and Boeing 787	14
United Airlines	MUC, Munich	ORD, Chicago	Boeing 777	7
United Airlines	MUC, Munich	IAH, Houston	Boeing 767	7
United Airlines	MUC, Munich	EWK, Newark	Boeing 767	7
United Airlines	MUC, Munich	SFO, San Francisco	Boeing 787	7
United Airlines	MUC, Munich	IAD, Washington	Boeing 777	7
United Airlines	HAM, Hamburg	EWK, Newark	Boeing 757	7
United Airlines	TXL, Berlin Tegel	EWK, Newark	Boeing 767	7

Source: U.S. Commerical Service

Market Profile

Snapshot: Germany

Overall Economic Situation

In November 2017, the Organization for Economic Cooperation and Development (OECD) issued the following statement about Germany's current and projected economic outlook for 2018:

Economic activity has expanded on a broad basis. The recovery in euro area trading partners has boosted exports and machinery and equipment investment. Construction has also been buoyant as the housing needs of immigrants, higher incomes and low interest rates have increased housing demand and the government has stepped up spending to improve maintenance of transport infrastructure and schools. House prices have risen, mostly in line with lower interest rates, higher rents and incomes. However, price increases have been particularly strong in major metropolitan areas. Mortgage lending has also been in line with income growth. On the back of stronger investment, business borrowing has picked up.

Strong labor market performance underpins the growth of household consumption. Vigorous employment growth has pushed the unemployment rate to record-low levels, while the number of vacant jobs is rising strongly. Immigration, mostly from other EU countries, remains strong. The number of refugees entering the labor market after they have received initial training is increasing and many of them are unemployed.

The fiscal stance is projected to be mildly supportive in 2018 and 2019. Higher income tax allowances, child benefits and somewhat higher public spending to support municipal investment and to improve childcare provision are mostly offset by revenue-raising measures. These include stricter rules in the taxation of households' capital income and the extension of road user charges to a wider range of roads and freight transport vehicles. On current policies, tax revenue growth is likely to increase the government surplus above 1 percent of GDP.

Economic growth is projected to ease somewhat but still remain robust and broad-based. The recovery in the euro area sustains exports and business investment. Nevertheless, business investment is still subdued by historic

standards. Housing investment will remain strong, driven by higher house prices, although unmet housing needs of refugees will diminish. The tight labor market will boost private consumption and is expected to result in some pick-up of wage and price inflation. The current account surplus will remain large. There are downside risks related to the impact of the exit of the United Kingdom from the European Union, as it may disrupt the sourcing of inputs by key German industries, including automotive production and chemicals. On the other hand, some businesses have announced they will transfer activity to Germany. Geopolitical risks could reduce world trade and German exports. Steps to implement reforms to complete the Single Market in the European Union and establish a more comprehensive banking union in the euro area could strengthen confidence in the euro.

German Travel Industry

According to German Travel Association's (DRV) annual survey, there were a total of 9,938 travel agencies in Germany in 2016, a slight decrease from 2015 (9,980). The turnover of EUR 30.2 billion generated by tour operators represents a market share of 50.5 percent while service providers rank second with a 36.2 percent market share (EUR 21.6 billion) and product portals and others combine for the remaining 13.3 percent (EUR 8.0 billion). Online bookings generated a total turnover of EUR 23.1 billion (39 percent) while offline bookings generated a total turnover of EUR 36.7 billion (61 percent). This underlines the continued importance of offline and travel agencies in the German market.

The overall outlook for 2018 is very positive among German travel agents, according to the latest monthly "sales climate index" by Germany's leading travel trade magazine fvw. In fact, it reached a new all-time high of 120.7 points in December 2017. More than half (57 percent) of the agents described their current sales figures as good. Nearly one third (31 percent) expect a rising demand in the coming months, while more than half predict at least even sales numbers.

German Travel Behavior

According to the annual consumer survey „Reiseanalyse“ conducted by FUR (Forschungsgemeinschaft für Urlaub und Reisen e.V.), the demand for travel remains on a high level with 69 million holidays (of 5 days or more) in 2017.

In addition, the number of short private trips increased by 2.5 percent to 91 million last year. Overall spending on holidays went up by 2 percent to €69 billion in 2017. Nearly one German in four (24 percent) plans to travel more this year than last year, which is a slight rise on the 23 percent figure at the same time last year. Moreover, 30 percent (compared to 28 percent last year) want to spend more on travel and holidays in 2018. In contrast, only 13 percent want to travel less (the same figure as last year) and a similar 13 percent plan to spend less (down from 14 percent last year). 26 percent expect their economic situation to improve within a year, while 56 percent do not see a change. Perceiving their economic situation as stable is an important precondition for holiday tourism in 2018. Overall, this indicates a positive holiday mood and good starting conditions for 2018 on the demand side.

German Travel to North America

2016 visitation numbers from Germany were reported at 2.03 million visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office). Full 2017 data is not available yet. 2015 visitation numbers from Germany were reported at an historic record number of 2.27 million visitors, representing a year-to-year decline of 10 percent. Still, 2.03 million German visitors to the United States represent the third best visitation all-time. Moreover, Germany continues to be the sixth largest market for inbound tourism to the U.S.

Policies introduced by the new U.S. Administration generated worries in the travel industry that foreign tourists could be put off by restrictions such as the travel ban for visitors holding a certain passport. After a year in office, Germany's top tour operators do not observe any negative developments as the demand for travel to the United States remains high, in part thanks to the stronger Euro, the German press agency DPA found in a survey.

Germany's second largest carrier Air Berlin filed for bankruptcy in August of 2017, leaving a gap in the market for long-haul flights to the United States from the German capital Berlin in particular. Lufthansa reports that they are experiencing difficulties in trying to replace the gaps left by their rival, the international news agency Reuters reports

Sources: OECD (Organization for Economic Cooperation and Development)
DRV (Deutscher Reiseverband)
fww
FUR (Forschungsgemeinschaft für Urlaub und Reisen e.V.)
U.S. Department of Commerce National Travel & Tourism Office
DPA (Deutsche Presse-Agentur)
Reuters

Snapshot: Austria

Overall Economic Situation

In November 2017, the Organization for Economic Cooperation and Development (OECD) issued the following statement about Austria's current and projected economic outlook for 2018:

Following strong rebounds in investment and exports, economic activity is set to remain buoyant through 2018 and, to a lesser extent, 2019. Unemployment will continue to decline and labor market participation will rise further, in particular for women and older workers. Inflation remains higher than in other euro area countries, mainly driven by prices in sectors that are little exposed to international trade.

A virtuous combination of domestic and international drivers has pushed Austria's growth momentum to heights not seen since the vigorous recovery from the global financial crisis. Investment has recovered strongly after several years of sluggishness. Employment outpaces the labor force, pushing down the unemployment rate following five years of steady increases. Private consumption continues to support growth, buoyed by job creation and improving confidence.

Economic growth reached 3 percent in 2017. Momentum is projected to remain strong into 2018 before slowing somewhat as the investment cycle matures and the labor market tightens. Household incomes will benefit from robust employment and positive real wage growth and private consumption will be further buttressed by declining saving rates as confidence improves. Against the backdrop of buoyant activity and increasing wages, inflation is projected to remain above 2 percent throughout the projection horizon. Driven by strong growth, declining government interest payments and the winding-down of bad bank liabilities, the public debt ratio is set to decrease sharply.

Austrian Travel Industry & Travel Behavior

The Austrian market is very similar to the German market as most Austrian tour operators are owned by German tour operators. Two major players dominate the market: World of TUI and Thomas Cook AG, with a combined market share in turnover of over 50 percent. Austrians continuously favor long-distance journeys, especially to the Americas (10.8 percent, according to the 2017 Allianz Global Assistance survey). Similarly, there

is an increased interest in city trips to far away destinations such as New York, Vancouver, Sydney or Tokyo. Following natural disasters, political changes and insolvencies of airlines, Austrians seek the security of a package holiday. 2016 visitation numbers to the USA from Austria were reported at 198,530 visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office). This represents a 10 percent decline over 2015 (537,000 visitors). Full 2017 data is not available yet.

Sources:

OECD (Organization for Economic Cooperation and Development)

Allianz Global Assistance

NTTO (U.S. Department of Commerce National Travel & Tourism Office)

Snapshot: Switzerland

Overall Economic Situation

In November 2017, the Organization for Economic Cooperation and Development (OECD) issued the following statement about Switzerland's current and projected economic outlook for 2018:

GDP growth is unlikely to have exceeded 0.8 percent in 2017, even though activity in the European Union picked up significantly. Exports and imports were nearly stagnant. Domestic demand has been weak, and household saving rose to 19 percent of disposable income. However, recent indicators, notably confidence surveys, point to greater momentum. Headline and core inflation have edged up, away from zero. The effective exchange rate depreciated over the summer after a period of relative stability since mid-2015. During that time, upward pressures on the currency were contained by Swiss National Bank (SNB) interventions, resulting in sizeable increases in already ample foreign reserves.

A return to nominal wage increases, the confidence-enhancing decrease in unemployment and the continuation of negative interest rates will boost private consumption and lower the household saving ratio. Investment will also gain some momentum through the projection period. The recent currency depreciation together with stronger growth in the United States and Europe will boost exports. Consumer price inflation will remain low. The current account surplus will increase slightly, driven by rising interest rates on foreign assets, even though imports are expected to gain some traction from buoyant domestic demand.

Economic activity is picking up after a weak 2017 outturn. An improving external environment and competitiveness gains will revive activity, raising export growth and invigorating investment. Domestic demand should provide additional stimulus as unemployment decreases and incomes rise. Inflation is projected to remain low given excess capacity. The large current account surplus will persist.

Profile of average Swiss traveler to the USA

Swiss tourists to the USA typically like to travel individually or in small groups. They enjoy the excellent U.S. travel infrastructure, which they consider a trademark of the mobile American society. It provides them with creative freedom, which is important for a mature market with some

75 percent of “repeaters” Groups larger than about 10 are mostly special interests or senior citizens who may have a higher language hurdle. The average Swiss visitor is mostly rather well informed about American issues and politics. Most enjoy an above average purchasing power. Average daily spending for Swiss travelers (per person) while in the USA is \$390.00. Swiss value punctuality and quality service at restaurants and hotels. Quality is a prime criteria, before price. The language hurdle tends to be quite low.

Swiss Travel Industry & Travel Behavior

A study conducted by Allianz Global Assistance in 2017 found that the booking behavior of Swiss travelers remains very stable – online travel agencies retain their high market share of previous years with 67 percent of all bookings. However, 50 percent of Swiss travelers book at least one holiday a year in a stationary travel agency, particularly for long-haul travel. The Maldives and Canary Islands are the most popular destinations during the winter months, while Spain, the United States and Greece are the most popular summer destinations. 2016 visitation numbers to the U.S. from Switzerland were reported at 469,000 visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office). This represents a 12.5 percent decline year-over-year (2015: 528,053 visitors). Full 2017 data is not available yet.

Sources:

OECD (Organization for Economic Cooperation and Development)

Allianz Global Assistance

NTTO (U.S. Department of Commerce National Travel & Tourism Office)

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
- 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	frVisitTheUSA.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/VisitTheUSAc	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
China	GoUSA.cn	即刻 定制 您的 USA 旅行计划	n/a	Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA 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/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	#USATrip	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/GoUSAkr	@GoUSAkr	#미국여행	VisitTheUSA	YouTube.com/GoUSAkr
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/GoUSA.official	@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, Germany

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright 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	38
Ecotourism and Nature	37
Dining/Gastronomy	35
Urban Attractions	32
Shopping	32

Top 5 Strongest Impressions of the USA

Impression	% Selected
Diverse	54
Adventurous	43
Forward-thinking	32
Trendy	29
Energetic	29

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: Germany intercontinental travelers (N=1040).

Source: Brand USA Market Intelligence Study 2018

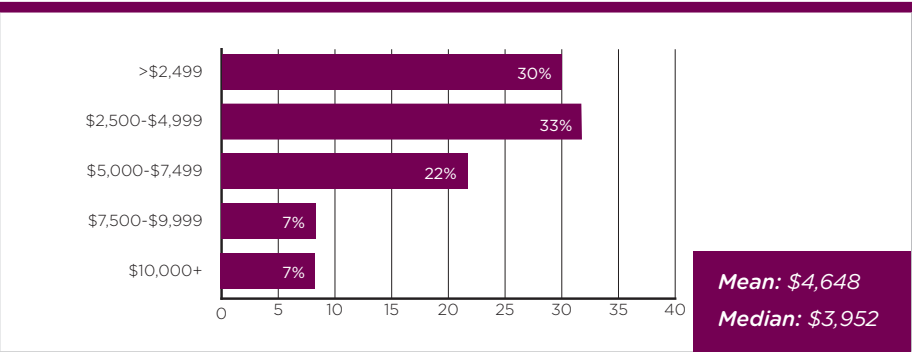
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	53
Personal Recommendations from family and friends	38
Information in printed travel guidebooks	31
Websites or applications via tablet	26
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: Germany intercontinental travelers (N=1040).

Source: Brand USA Market Intelligence Study 2018

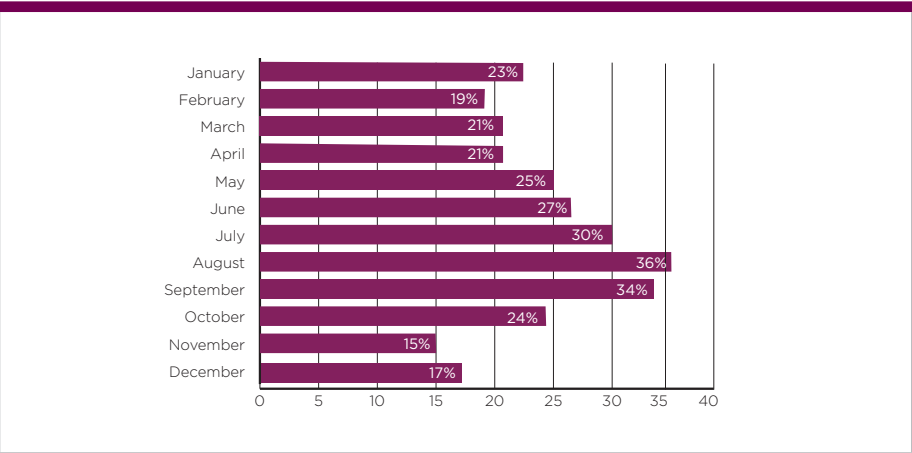
Expected Household Travel Spend for Next Intercontinental Trip



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.

Source: Brand USA Market Intelligence Study 2018

Months Traveled (March 2016–March 2018)

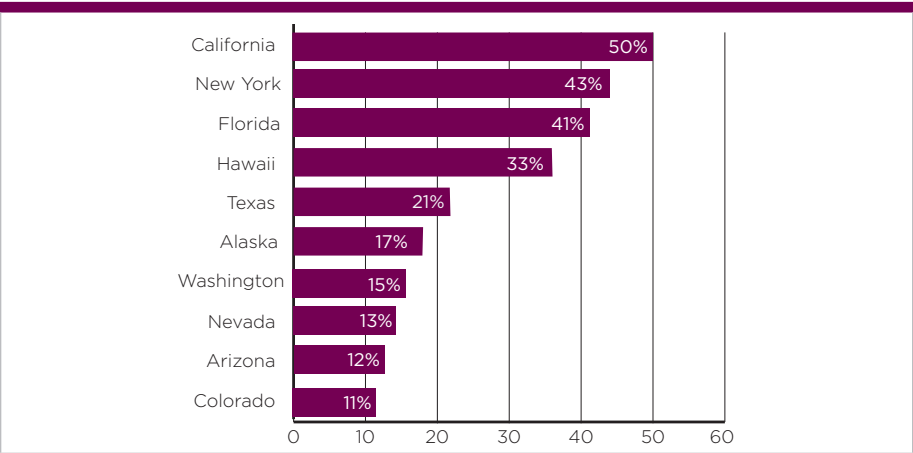


Question: During what month(s) did you take your holiday(s)?

Base: Germany intercontinental travelers (N=1040).

Source: Brand USA Market Intelligence Study 2018

Destination Interest—Top 10 States

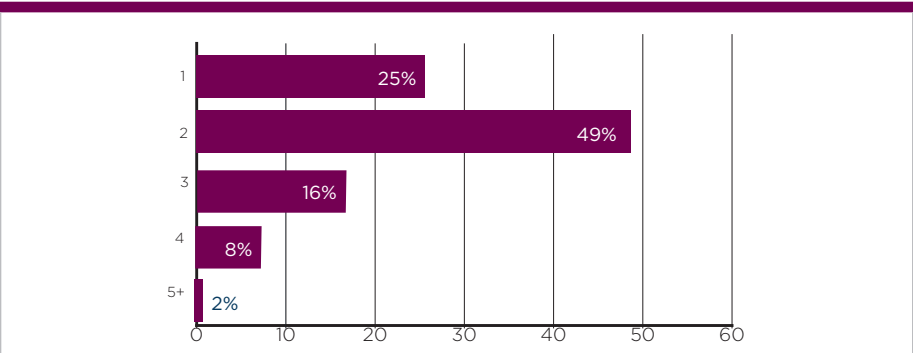


Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting?

Base: Germany intercontinental travelers who are interested in visiting the USA (N=916).

Source: Brand USA Market Intelligence Study 2018

Expected Travel Party Size of Next Intercontinental Trip

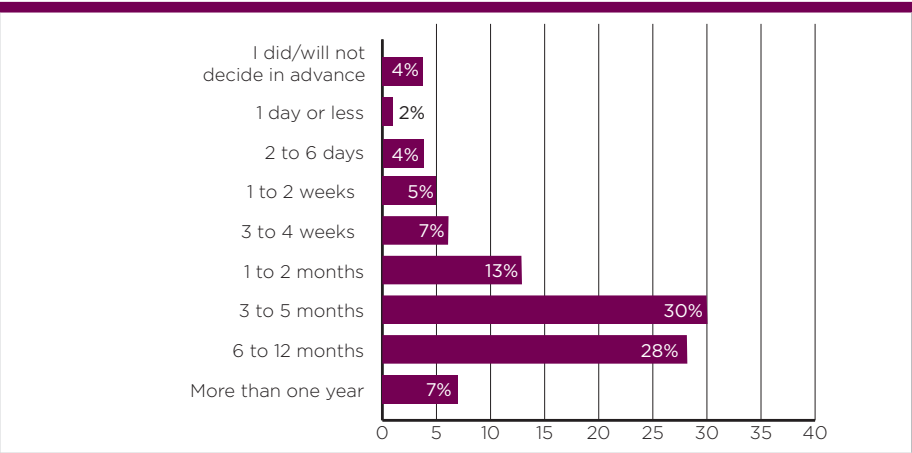


Question: Who will travel with you on this holiday? Select all that apply.

Base: Germany intercontinental travelers (N=1040).

Source: Brand USA Market Intelligence Study 2018

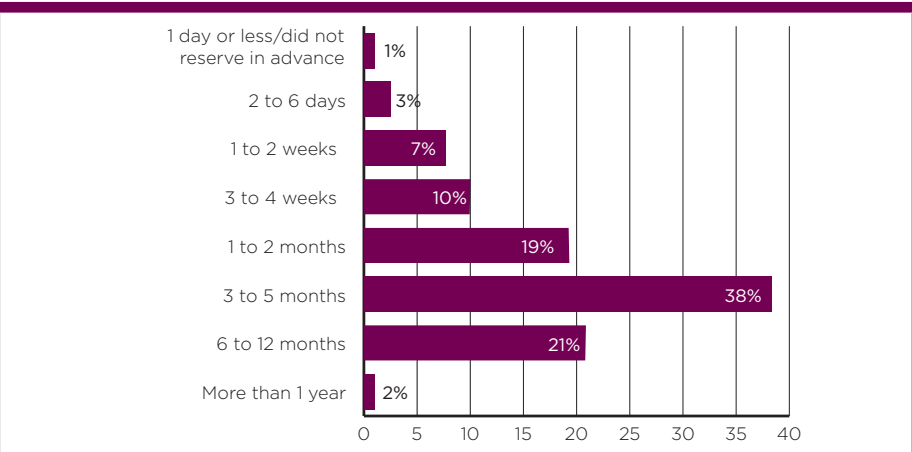
Destination Decision for Next International Trip



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.
Base: Germany intercontinental travelers (N=1040).
Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2018

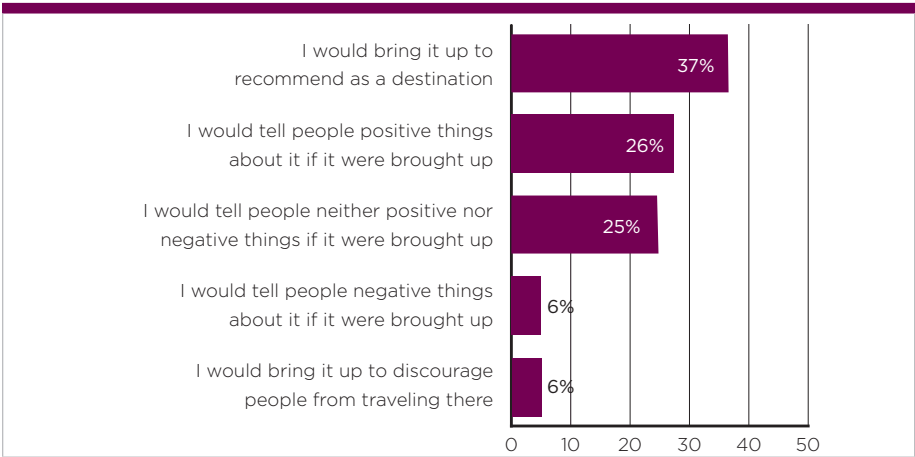
Air Booking for Next International Trip



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: Germany intercontinental travelers (N=1040).

Source: Brand USA Market Intelligence Study 2018

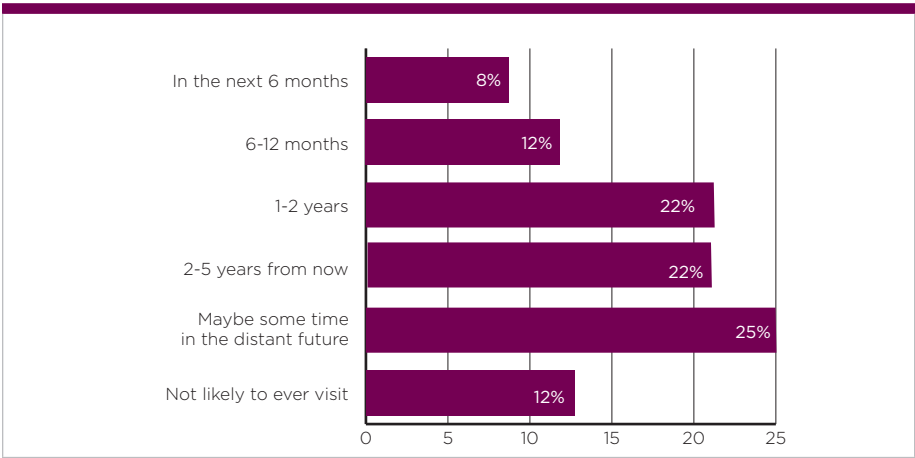
Net Promoter



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

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: Germany intercontinental travelers (N=1040).

Source: Brand USA Market Intelligence Study 2018.

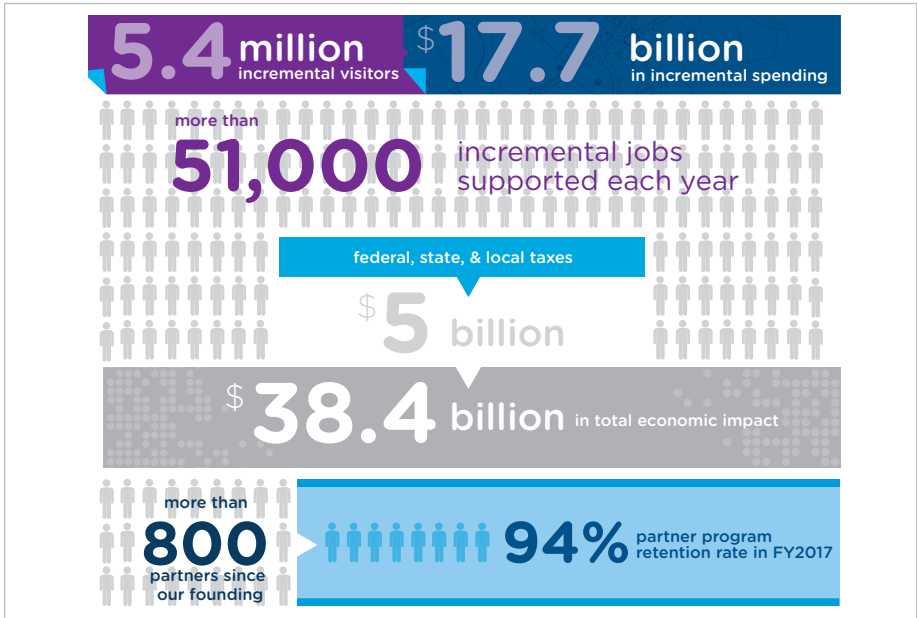
Brand USA Highlights

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) an 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: Germany, Austria, Switzerland

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.

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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 Germany, Austria, and Switzerland can be reached at the contact details below.



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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 & 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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