



VisitTheUSA.com

Brand USA

Market Information 2018

ITALY



Cover images: Niagara Falls, New York and Virginia Beach, Virginia

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 Italy, 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 destination-marketing organization for the United States — look forward to working with you to tap the great potential of Italy’s outbound-tourism market.

This market guide will familiarize you with the factors that make Italy a desirable market to cultivate.

During 2016, 983,000 travelers from Italy came to the USA. Information from the National Travel and Tourism Office for the first eight months of 2017 shows that 684,000 Italian visitors made the trip. The level of visitation from Italy is expected to reach 1 million for 2018. The general trend has been upward. The number of Italian arrivals in the United States expanded 30 percent from 2009 to 2016.

Italian travelers, according to recent research, are increasingly looking for trips that favor activity and culture – more so than travelers from other markets. Itineraries that are limited to relaxation at a seaside location are dwindling. Travelers from Italy are also known for last-minute booking.

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. In turn, Hills Balfour is working with one of its sister agencies, Interface Tourism Italy, to support Brand USA’s mission and messaging in Italy.

Brand USA has 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 Spanish-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 among international travelers from Italy. They can discuss with you the most effective ways to inspire these travelers to book their trips to the USA now.

In October, for instance, Brand USA and a contingent of its industry partners will showcase the USA as a diverse, world-class destination at Italy’s foremost B2B travel and tourism tradeshow, the 55th annual TTG Incontri in Rimini. This event typically draws 2,500 exhibitors, representing 150 destinations. More than 70,000 visitors attend, along with 750 journalists and 300 bloggers.

During 2018, Brand USA will also: arrange U.S. FAM trips for product managers from Italy; host training for travel agents throughout Italy; and continue to develop co-op marketing programs.

Together, we are marketing the USA!

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President & CEO

Brand USA

Brand USA

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Geography

Area

301,340 sq km

Source: CIA World Factbook 2018

Demographics

Population

Italy

62,137,802

United States

326,625,791

Source: CIA World Factbook 2018

Largest Metropolitan Areas

Rome (capital): 3.718 million

Milan: 3.099 million

Naples: 2.202 million

Turin: 1.765 million

Palermo: 853,000

Bergamo: 840,000

Source: CIA World Fact book 2018

Population by Age

Age	USA	Italy
0-14 years	18.73%	13.65%
15-24 years	13.27%	9.66%
25-54 years	39.45%	42.16%
55-64 years	12.91%	12.99%
65 years and older	15.63%	21.53%
Median age	38.1	45.5
Population growth rate	0.81%	0.19%

Source: CIA World Factbook 2018

Economy

GDP: \$2.307 trillion

GDP real growth rate: 1.5%

GDP—per capita: \$38,000

Unemployment rate: 11.4%

Inflation rate: 1.4%

Source: CIA World Fact book 2018

Vacation Allocation and Public Holidays

Salaried Italian employees earn an average of 33 days of paid vacation per year. Fortunate workers also receive either a thirteenth month salary and/or vacation bonus. There are 13 days of public holidays:

Holiday	Day
New Year's Day	January 1
Epiphany	January 6
Easter Day	April 1
Easter Monday	April 2
Liberation Day	April 25
Labor Day	May 1
Republic Day	June 2
Assumption of Mary/ Ferragosto	August 15
All Saints' Day	November 1
Feast of the Immaculate Conception	December 8
Christmas Day	Christmas Day
St. Stephen's Day	St. Stephens Day
New Year's Eve	New Year's Eve

Public Schools Holidays:

Carnival Holidays (forty days before Easter Day): 1-3 days

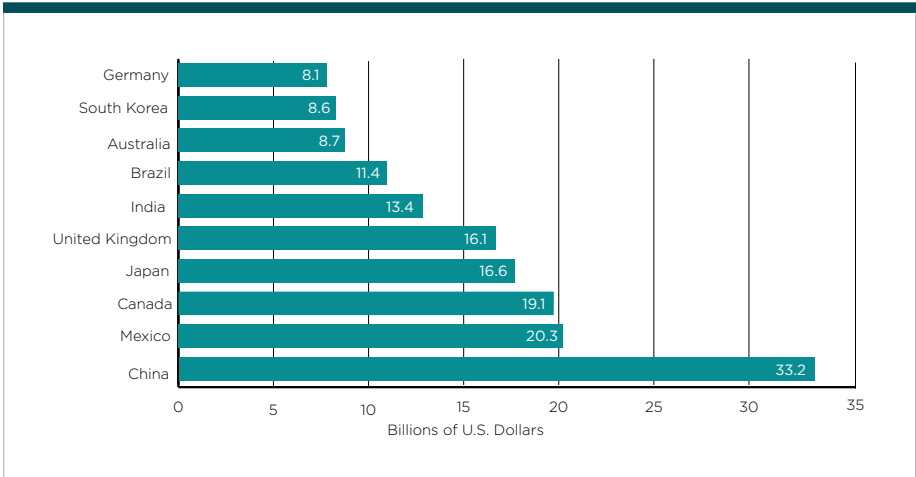
Easter Holidays: 5/7 days including Easter Day and Easter Monday
(it can change depending on the region)

Summer Holidays: around three months from June until September
(start and end depending on the region)

Christmas Holidays: around two weeks

International Visitation Trends*

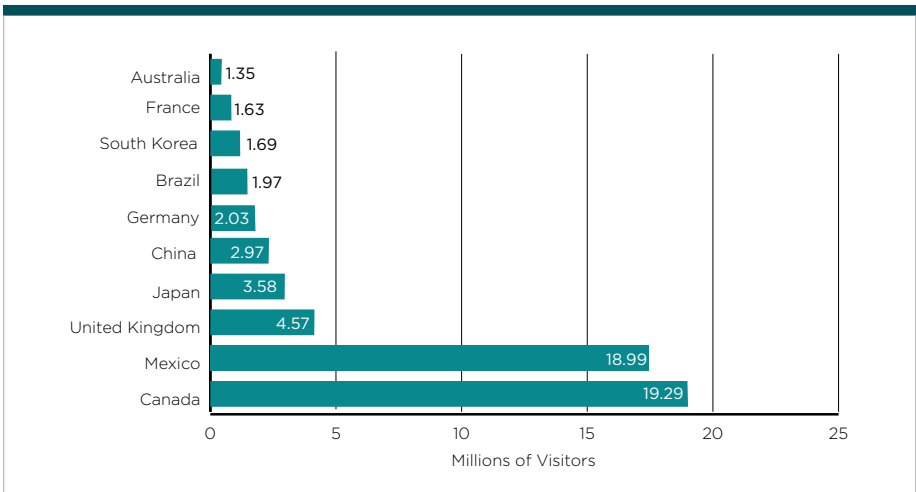
Visitor Spending (billions of U.S. dollars)



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.

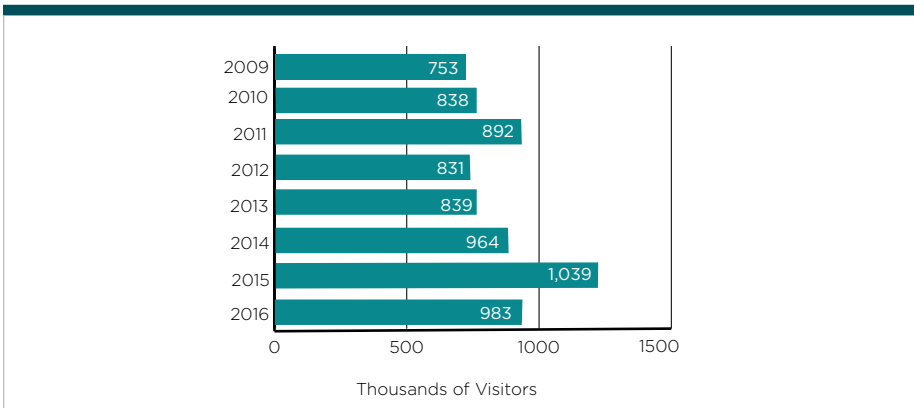
Travel Trends*

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

	2009	2010	2011	2012	2013	2014	2015	2016	Change
Total Travel & Tourism Exports	\$3,207	\$3,199	\$3,547	\$3,449	\$3,673	\$4,117	\$4,303	\$4,020	\$813
Travel Receipts	\$2,398	\$2,325	\$2,477	\$2,357	\$2,540	\$2,878	\$3,125	\$2,972	\$574
Passenger Fare Receipts	\$809	\$874	\$1,070	\$1,092	\$1,133	\$1,239	\$1,178	\$1,048	\$239
Change (%) in Total Exports	-11	0	11	-3	6	12	5	-7	25

Source: U.S. Department of Commerce, International Trade Administration; Office of Travel & Tourism Industries

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	59	66	6.7
Visit Friends/Relatives	15	12	-3.1
Business	12	13	0.7
Convention/Conference/Trade Show	9	6	-2.8

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

All Purposes of Trip

All Purposes of Trip	2015 (%)	2016 (%)	Point Change
Vacation/Holiday	68	73	5.6
Visit Friends/Relatives	24	23	-1.6
Business	15	16	1.2
Convention/Conference/Trade Show	9	6	-2.8
Education	6	6	-0.3
Religion/Pilgrimages	1	1	0.1
Health Treatment	0.1	0.2	0.1
Other	1	1	0.4
Net Purposes Of Trip:			
Leisure & Visit Friends and Relatives	79	83	4.2
Business & Convention	25	23	-1.9

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

Select Traveler Characteristics

Traveler Characteristics	2015	2016	Change
Length of Stay in U.S. (mean nights)	15.6	12.8	-2.8
Length of Stay in U.S. (median nights)	9	9	0.0
First International Trip to the U.S.	33	35	1.7

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

Activities	2015 (%)	2016 (%)	Point Change
Shopping	76	85	8.9
Sightseeing	67	71	4.0
Amusement/Theme Parks	42	43	0.9
National Parks/Monuments	37	43	5.6
Nightclubbing/Dancing	20	18	-1.5
Art Gallery/Museum	42	43	0.9
Concert/Play/Musical	17	16	-0.8
Historical Locations	25	25	0.2
Experience Fine Dining	23	27	4.3
Guided Tours	22	26	3.6
Small Towns/Countryside	29	27	-2.1

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

Transportation Used in the USA

Transportation Types	2015 (%)	2016 (%)	Point Change
Rented Auto	30	28	-2.3
Air Travel between U.S. Cities	28	28	0.1
Auto, Private or Company	30	32	1.2
Taxicab/Limousine	36	33	-3.0
City Subway/Tram/Bus	43	48	4.8
Bus between Cities	18	21	2.7
Ferry/ River Taxi/ Srt Scenic Cruise	17	16	-0.8
Rented Bicycle/ Motorcycle/ Moped	6	5	-1.9
Railroad between Cities	6	6	0.6
Motor home/Camper	1	0.3	-1.1

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

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	48.20	501	49.52	487
States				
New York	45.92	477	46.82	460
Cities				
New York City	45.20	470	46.43	456

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

Air Travel Information

Italy to the USA

City	Airlines	Duration
Milano Mxp - New York JFK daily flight: 13h10-16h00 (seasonal flight: June-October)	Air Italy (A330)	8h50
Milano Mxp -New York JFK daily flight: 12h40-15h55	Alitalia (A330)	9h15
Milano Mxp -New York JFK daily flight: 10h20>13h25	American Airlines (Boeing 777-200/200ER)	9h05
Milano Mxp - New York JFK daily flight: 9h45-12h57	Delta (A330)	9h12
Milano Mxp- New York JFK daily flight: 16h10>19h00	Emirates (A380)	8h50
Milano Mxp- New York JFK daily flight: 10h30>13h45	United (Boeing 767-400ER)	9h15
Milano Mxp- New York EWR daily flight: 10h30>13h35	United (Boeing 767-400ER)	9h05
Rome FCO - New York JFK daily flight: 9h30>13h15 10h40>14h15 14h50>18h35	Alitalia (A330 - A77W - A772)	9h45
Rome FCO - New York JFK daily flight: 11h25>15h26 (Nov>Feb) 12h20>16h11	Delta (Boeing 767 - A330)	9h51-10h01
Rome FCO - New York JFK daily flight: 9h45>13h30	United (Boeing 767-400ER)	09h45
Rome FCO - New York EWR daily flight: 18h05>21h25	Norwegian (Dreamliner 787)	9h20
Rome FCO - New York EWR daily flight: 9h45>13h30	United (Boeing 767-400ER)	09h45
Venezia VCE- New York JFK daily flight: 13h10>16h33 (seasonal flight: April>October)	Delta (Boeing 767)	9h23
Venezia VCE- New York EWR daily flight: 10h55>14h25 (seasonal flight: April>September)	United (Boeing 767-300)	9h30

Milano Mxp - Miami 9h45>13h30 (seasonal flight: June-October Monday-Wednesday-Friday-Sunday)	Air Italy (A330)	10h45
Milano Mxp - Miami daily flight:11h00>15h35	American Airlines (Boeing 777-200/200ER)	10h35
Rome FCO - Miami daily flight: 10h40>15h50	Alitalia (A330)	11h10
Milano Mxp - Atlanta daily flight: 11h15>15h59 (seasonal flight: May-August)	Delta (Boeing 767)	10h44
Venezia VCE - Atlanta 11h05>15h54 (seasonal flight: May>September Tue-Wed-Thu-Fri-Sat)	Delta (Boeing 767)	10h49
Milano Mxp - Los Angeles 17h55>21h10 (seasonal flight: June-October Tuesday-Wednesday-Thursdays-Sat- urday-Sunday)	Norwegian (Dreamliner 787)	12h15
Rome FCO - Los Angeles daily flight: 9h35>13h40 (seasonal flight: March-October)	Alitalia (A772)	13h05
Rome FCO - Los Angeles daily flight: 9h10>13h20 (seasonal flight: November- February Wednesday-Friday-Sunday)	Alitalia (A772)	13h10
Rome FCO - Charlotte daily flight: 11h10>16h05 (Mar>Aug) 11h45>16h35 (Sep>Nov)	American Airlines (A330-300)	10h55
Rome FCO - Boston 10h10>13h50 (Nov>Feb: Mon-Thu-Fri-Sat- Sun) 15h00>18h20 (March>Oct: daily flight)	Alitalia (A330)	9h20-40
Rome FCO - Chicago daily flight: 9h30>13h10 (seasonal flight: June>Sept)	Alitalia (A330)	10h40
Rome FCO - Chicago daily flight: 11h00>14h35 (seasonal flight: Apr>Oct)	American Airlines (Boeing 787-8 Dreamliner)	10h35
Rome FCO - Chicago daily flight: 10h20>14h10 (seasonal flight: May>Oct)	United (Boeing 767-300)	10h50

Venezia VCE - Chicago daily flight: 14h50>18h30 (seasonal flight: May>Oct)	American Airlines (Boeing 787-8 Dreamliner)	10h40
Rome FCO - Dallas daily flight: 09h15>14h20 (seasonal flight: Apr>Oct)	American Airlines (Boeing 777-200/200ER)	12h05
Rome FCO - Detroit daily flight: 11h15>15h32 (seasonal flight: Apr>Oct)	Delta (A330)	12h05
Rome FCO - Philadelphia daily flight: 11h10>15h10 (Sep>Oct) 11h35>15h50 (Nov>Jan) 11h45>15h10 (Mar>Aug)	American Airlines (A330-200 A330-300)	10h00 10h15 9h55
Venezia VCE - Philadelphia daily flight: 12h10>15h45 (seasonal flight: May>Oct)	American Airlines (A330-300)	9h35
Rome FCO - Washington, DC daily flight: 10h50>15h00 (seasonal flight: Mar>Oct)	United (Boeing 767-300)	10h10
Rome FCO - Oakland (Apr>Oct) Tuesdays: 10h35>14h00 Saturdays: 15h55>19h20 (Nov>March) Tuesdays: 12h45>16h20 Fridays: 9h55>13h30	Norwegian (Dreamliner 787)	12h25-35

Market Snapshot

- According to Confturismo, the organizational structure for coordinating the tourism sector promoted by the Confederation, tourism still remains an important driver for economic growth in 2018. In particular, besides cultural tourism, with artistic itineraries, two new kinds of experiential tourism holidays are more and more emerging in the last few years: shopping tourism and enogastromic tourism. The latter considers food and wine a possibility to explore and get in touch with the real culture of a destination.
- According to Istat, the Italian National Institute of Statistics, in 2017 trips with overnight stays made by residents were 66,347 million.
- More than half of trips (55.7%) were organized through direct booking, whereas trips made without booking were 36.6% and trips booked via travel agency/tour operator were only 7.4%. The share of trips booked using the Internet increased by more than five percentage points compared to 2016, regarding 44.0% of holidays and 55.0% of business trips.
- 2017 summer season saw 34,4 million Italian travelling, meaning + 3,2% compared to 2016 and with an average length of 10 days. 55% of travelers have planned their summer vacation within June, confirming a last minute booking trend. Preferred summer destinations: Italy 78% vs foreign countries: 22%. Christmas and New York have recorded an increase by 10% in outgoing departures.

The Italian tourist profile

- In comparison to other countries and to what happened in the past, Italians are more and more looking for active and cultural trips, while sea and sun is becoming less attractive. Holidays are always more meant for discovering and not only relaxing;
- Outbound traveller is average aged between 35 and 54;
- Seniors represent an emerging and relevant traveller segment profile with high purchase power and able to travel in any period of the year;
- Main part of travellers come from urban areas and have a medium-high social and cultural profile;
 - Decision making is in the hands of women;
 - They generally prefer organized tours with Italian speaking guides;
 - Italians consider elements of particular importance: security, quality of

accommodation and food, gastronomy;

- Italians are traditionally last minute bookers.

The Italian Travel Industry in pills

- **Tour Operators:** in Italy there are more than 280 Tour Operators, but only four of them can record revenue exceeding 100 million euros a year.

Small/medium sized companies are the real engine of the market because they ensure greater flexibility and speed of response to travel agencies; personalized services, innovative products and the possibility to expand targets.

- **Travel Agencies Networks:** around 8500 travel agencies are currently working in Italy. Most of them (around 7000) are associated to a travel network.

In July 2016, 19 consortia were present in the market (they were 27 in 2017).

The main 5 Italian networks are:

1. Welcome/Geo
2. Bluvacanze
3. Gattinoni Mondo di Vacanze
4. UVET
5. Robintour

- **Travel Agencies:** only 54 percent of sales of travel agents are Tour Operators products; 46 percent is defined as “self tour operating” with direct negotiations between the Italian travel agent and the inbound and/or hotel in the destination. The main market trends include: vertical integration of the travel network and group trips organized by single travel agencies.
- **OTA (Online Travel Agencies):** online booking is becoming more and more complex. From mass market websites created to “save money” (e.g. Volagratis, Lastminute), to the research of the “hidden secrets” (e.g. SecretEscape, TripAdvisor).

Creation of special packages for web users sold through specialized portals (e.g. SecretEscape) or dedicated to specific targets (e.g. active travel, travel with bloggers...).

- According to the U.S. Commercial Service, in the last few years Italian

tourist flows to the US recorded a slight decrease. However, Italian tourists are now starting to travel to the USA again: in 2017, among non-European destinations, Usa was the most visited country for long holidays (4.1 percent) and for business trips (7.1 percent). This trend is more and more increasing, also thanks to new flight connections. The aim is to reach 1 million visitors from the Italian market by 2018.

- Italy out bound tourism to the USA:
 - 983,000 Italian arrivals in 2016;
 - 4th largest European market;
 - 12th largest international market.

In the period January-August 2017, it was recorded 684.000 Italian arrivals to the U.S., which means a 6 percent increase compared to 2016.

Sources: 2017, Confturismo, 2017, Istat, 2015, Travel magazine Guida Viaggi, 2018, U.S. Department of Commerce - International Trade Administration

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)
- Google+: [Google.com/+VisitTheUSA](https://plus.google.com/+VisitTheUSA)

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

- Global: [#VisitTheUSA](https://twitter.com/hashtag/VisitTheUSA)
- Flavors/Culinary: [#TasteUSA](https://twitter.com/hashtag/TasteUSA)
- Road Trips: [#RoadTripUSA](https://twitter.com/hashtag/RoadTripUSA)
- Great Outdoors: [#OutdoorsUSA](https://twitter.com/hashtag/OutdoorsUSA)
- Market the Welcome: [#USAWelcome](https://twitter.com/hashtag/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/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	frVisitTheUSA.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://iyouku.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	#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/VisitTheUSAmx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.orkr	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

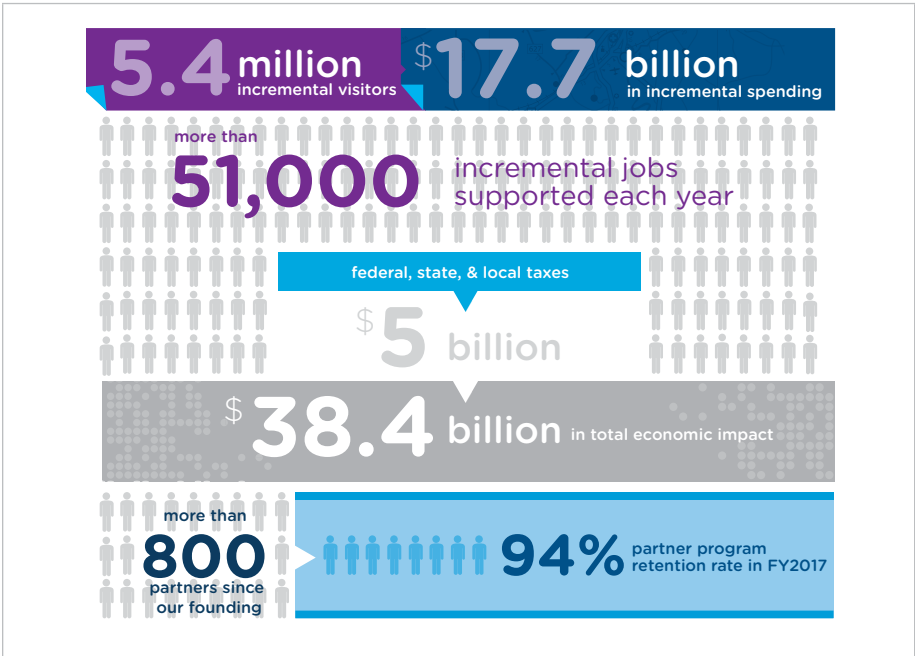
Brand USA Highlights

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, Italy

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 Italy Association

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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. To search for a domestic trade specialist near you, visit www.export.gov.



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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 & 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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