



VisitTheUSA.mx

Brand USA

Market Information 2018

MEXICO



Cover images: Acadia National Park, Maine and Lake Superior, Michigan

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 Mexico, 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
Vacation Allocation and Public Holidays	9
International Visitation Trends	10
Travel Trends.....	11
Traveler Characteristics.....	12
Air Travel Information.....	15
Travel Markets.....	25
Market Snapshot	26
Brand USA Online Channels	27
Brand USA Traveler Research	30
Brand USA Highlights	35
Brand USA Markets	37
Visit USA Committee, Mexico	38
About the U.S. Commercial Service	39
Our Partnership with the U.S. Department of Commerce.....	40
About the National Travel & Tourism Office.....	40

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.

Brand USA Headquarters

1725 Eye Street NW

Eighth Floor

Washington, DC 20006 USA

Phone: +1 202.536.2060

Email: info@TheBrandUSA.com

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 Mexico’s outbound-travel sector.

This guide will familiarize you with Mexico’s dynamic marketplace and its vibrant culture. You will quickly see that in addition to already being a top source market for travel to the United States, Mexico presents tremendous potential.

Approximately 19 million Mexican travelers visited the United States during 2016. This allowed Mexico to rank second among the top-10 source markets for international arrivals in the United States during 2016. The number of visitors from Canada exceeded the number from Mexico by just 300,000. On the spending side, Mexican travelers also ranked second. (Travelers from China spent the most.) Mexican visitors spent \$20.3 billion, 5 percent more than the preceding year. It was the fourth-straight year for record spending by Mexican travelers coming to the United States.

Mexico’s two major domestic airlines, Volaris and Aeromexico, have 21 and 18 U.S.-bound routes, respectively. Another Mexican carrier, Interjet, has 11 routes. Other options are also available for Mexican flights to the United States.

In a 2017 survey of travelers from Mexico who venture beyond their borders, 39 percent of the respondents said they would recommend the USA as a travel destination without any prompting. Another 24 percent said they’d speak in a positive manner if the issue of U.S. travel came up in conversation.

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

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 have Spanish-language content in the near future.

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

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

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

I invite you to talk to our team about trip experiences in the USA and opportunities to enhance your marketing efforts in Mexico. They can discuss with you the many ways to inspire Mexican travelers to book their trips to the USA now.

And, please note that Lourdes Berho, who founded Alchemia: In the Business of Transformation, has now taken the role of strategic director for Brand USA in Mexico. She brings years of experience that spans brand development, integrated-marketing strategies, and travel and tourism.

Together, we are marketing the USA!

Chris Thompson

President & CEO

Brand USA

Brand USA

Executive and Senior Leadership

Christopher L. Thompson

President & CEO
CThompson@TheBrandUSA.com

Thomas Garzilli

Chief Marketing Officer
TGarzilli@TheBrandUSA.com

Anne Madison

Chief Strategy & Communications Officer
AMadison@TheBrandUSA.com

Donald F. Richardson

Chief Financial Officer
DRichardson@TheBrandUSA.com

Karyn Gruenberg

Senior Vice President,
Partner Marketing & Strategic Alliances
KGruenberg@TheBrandUSA.com

Cathleen Domanico

Vice President, Global Trade Development
CDomanico@TheBrandUSA.com

Tracy Lanza

Vice President, Integrated Marketing
TLanza@TheBrandUSA.com

Stanley Mattos

Vice President, Financial Operations &
Facilities Operations
SMattos@TheBrandUSA.com

Joann Pelipesky

Vice President, Human Resources &
Administration
JPelipesky@TheBrandUSA.com

Carroll Rheem

Vice President, Research & Analytics
CRheem@TheBrandUSA.com

Aaron Wodin-Schwartz

Vice President, Public Policy & Public Affairs
AWodinSchwartz@TheBrandUSA.com

Geography

Area

1,964,375 sq km

Source: CIA World Factbook 2018

Demographics

Population

Mexico

124,574,795

United States

326,625,791

Source: CIA World Factbook 2018

Largest Metropolitan Areas

Mexico City: 20.999 million

Guadalajara: 4,843 million

Monterrey: 4,513 million

Puebla: 2,984 million

Toluca: 2.164 million

Tijuana: 1,987 million

Source: CIA World Factbook 2018

Population by Age

Age	USA	Mexico
0-14 years	18.73%	26.93 %
15-24 years	13.27%	17.54%
25-54 years	39.45%	40.81%
55-64 years	12.91%	7.64%
65 years and older	15.63%	7.09%
Median age	38.1	28.3
Population growth rate	0.81%	1.12%

Source: CIA World Fact book 2016

Economy

GDP: \$2.406 trillion

GDP real growth rate: 2.1%

GDP—per capita: \$19,500

Unemployment rate: 3.6%

Inflation rate: 5.9%

Source: CIA World Factbook 2018

Vacation Allocation and Public Holidays

Salaried Mexican employees earn an average of six days of paid vacation each year.

Mexico has seven national holidays, four religious holidays, and one or two state and city holidays each year.

The yearly national holidays are:

- Jan. 1: New Year's Day
- Feb. 5: Constitution Day
- March 1: Benito Juárez's Birthday
- May 1: Labor Day
- Sept. 16: Independence Day
- Nov. 20: Revolution Day
- Dec. 25: Christmas

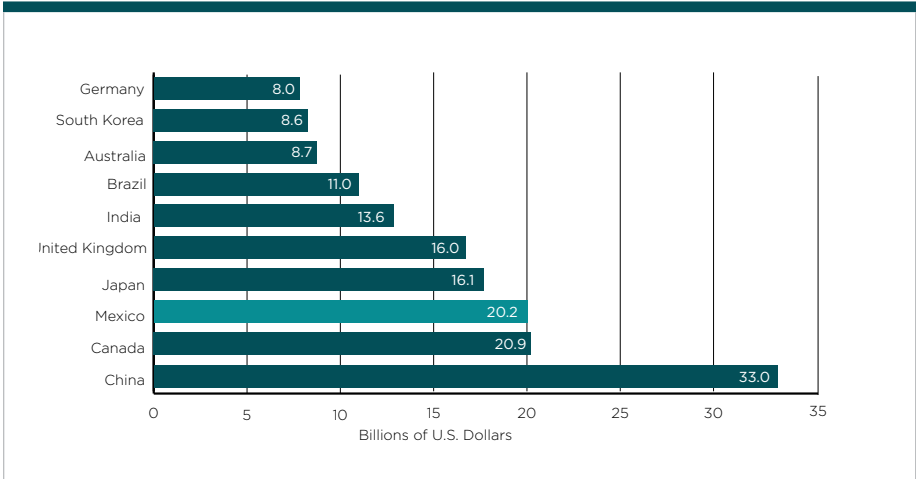
The religious holidays are Easter (spring), All Saints Day (Nov. 1), Day of the Virgin of Guadalupe (Dec. 12), and The Three Wise Men Day (Jan. 6).

Primary Travel Periods

- Summer holidays: six weeks of school vacation, July
- Easter holidays and Holy Week: two weeks of school vacation, March or April
- Christmas holidays: two weeks, December into January

International Visitation Trends*

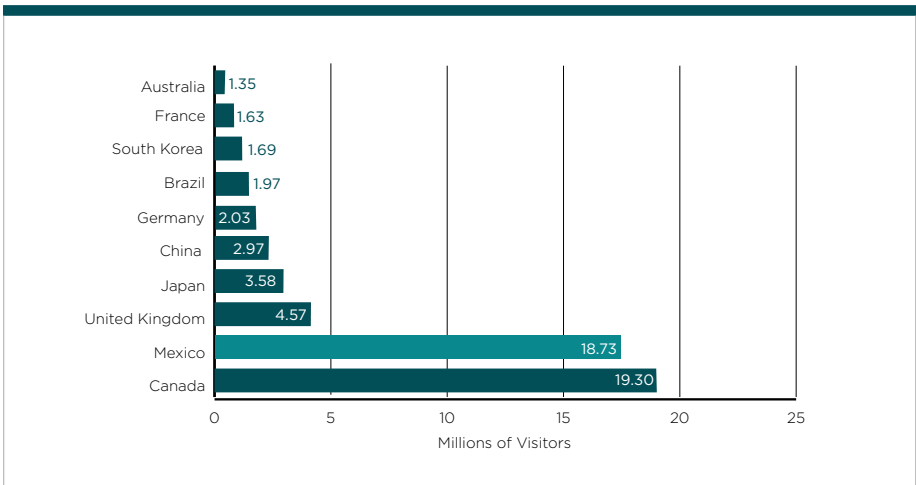
Visitor Spending (billions of U.S. dollars)



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.

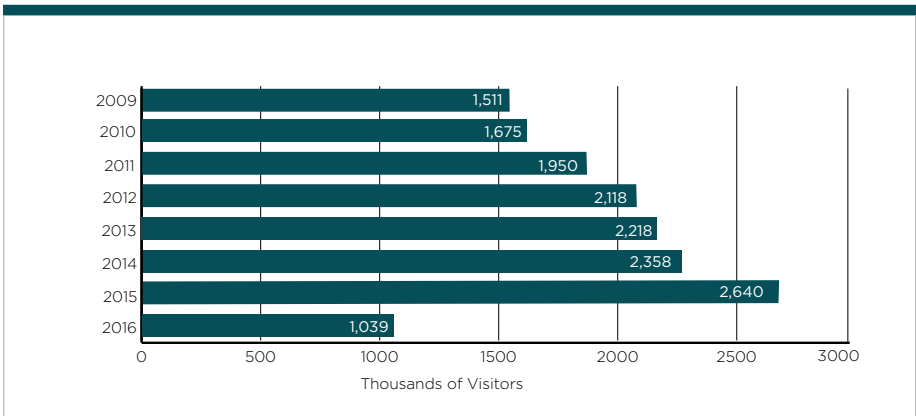
Travel Trends*

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

	2008	2009	2010	2011	2012	2013	2014	2015	Change
Total Travel & Tourism Exports	\$5,121	\$5,235	\$7,603	\$9,983	\$11,343	\$12,419	\$13,429	\$14,388	\$9,267
Travel Receipts	\$3,949	\$3,988	\$5,846	\$7,411	\$8,531	\$9,247	\$9,247	\$11,072	\$7,123
Passenger Fare Receipts	\$1,172	\$1,247	\$1,757	\$2,572	\$2,812	\$3,172	\$3,172	\$3,316	\$2,144
Change (%) in Total Exports	33	2	45	31	14	9	5	3	181

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	51	51	0.6
Visit Friends/Relatives	20	19	-1.2
Business	18	17	-0.1
Convention/Conference/Trade Show	6	7	0.1

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	61	62	1.3
Visit Friends/Relatives	33	33	0.3
Business	20	20	0.0
Convention/Conference/Trade Show	9	10	0.9
Education	6	7	1.4
Religion/Pilgrimages	0.4	0.9	0.5
Health Treatment	1.0	1.3	0.3
Other	0.5	0.0	-0.5
Net Purposes Of Trip:			
Leisure & Visit Friends and Relatives	76	76	0.2
Business & Convention	26	27	0.6

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)	11.6	10.8	-0.8
Length of Stay in U.S. (median nights)	6	6	0.0
First International Trip to the U.S.	15	11	-4.1

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	86	83	-2.4
Sightseeing	62	63	0.9
Amusement/Theme Parks	25	27	1.8
National Parks/Monuments	24	24	0.2
Nightclubbing/Dancing	16	19	2.8
Art Gallery/Museum	23	27	3.9
Concert/Play/Musical	15	16	1.1
Historical Locations	17	18	0.9
Experience Fine Dining	41	26	-14.6
Guided Tours	14	13	-1.1
Small Towns/Countryside	17	15	-1.5

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				
Mountain	16.46	435	**	**
Pacific	**	**	20.26	516
South Atlantic	**	**	26.27	670
States/Territories				
Florida	17.07	**	20.52	523
California	19.11	**	18.73	477

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

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

Transportation Used in the USA

Transportation Types	2015 (%)	2016 (%)	Point Change
Rented Auto	27	25	-2.8
Air Travel between U.S. Cities	22	17	-4.4
Auto, Private or Company	38	40	-21.4
Taxicab/Limousine	29	28	-1.4
City Subway/Tram/Bus	16	17	-4.0
Bus between Cities	16	12	24.2
Ferry/ River Taxi/ Srt Scenic Cruise	5	5	0.3
Rented Bicycle/ Motorcycle/ Moped	2	2	0.3
Railroad between Cities	3	4	0.9
Motor home/Camper	0.1	0.7	0.6

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

Air Travel Information

Volaris, Interjet and Aeromexico are Mexico's major domestic airlines that connect the country with the main cities in the United States. Volaris - which flies to New York, Houston, Portland (Ore.), Fort Lauderdale, Orlando, Phoenix, Denver and San Juan among others has 60 U.S.-bound routes, Aeromexico has 38 and Interjet has 23 routes.

Also, Viva Aerobus, a low-cost Mexican carrier, recently started operating flights to Las Vegas, Houston, Los Angeles, Chicago and New York. The flights leave from Mexico City, Monterrey, Guadalajara and Cancun.

Mexico City to the USA (February 2018 -January 2019)

Destination	Routes	Total Flights	Total Seats
United States	-	35,482	5,248,338
Los Angeles	Aeroméxico	1,754	280,604
	American Airlines	730	116,800
	Delta Air Lines	365	48,180
	Interjet	681	102,150
	United Airlines	365	52,344
	Volaris	704	129,278
New York JFK	Aeroméxico	1,460	273,319
	Delta Air Lines	380	74,880
	Interjet	1,314	197,100
	Volaris	553	101,710
Houston George Bush	Aeroméxico	1,052	104,015
	Interjet	592	88,800
	United Airlines	2,399	319,516
Dallas/Fort Worth	Aeroméxico	730	72,000
	American Airlines	1,802	272,000
	Interjet	625	93,750
Miami	Aeroméxico	831	116,436
	American Airlines	1,408	180,224
	Interjet	631	94,650
	Volaris	132	23,628

Destination	Routes	Total Flights	Total Seats
Chicago O'hare	Aeroméxico	841	133,444
	Interjet	584	92,640
	United Airlines	657	89,920
	Volaris	356	65,334
Las Vegas	Aeroméxico	707	100,736
	Interjet	362	54,300
	VivaAerobus	269	50,034
	Volaris	296	53,775
San Francisco	Aeroméxico	734	117,440
	United Airlines	730	98,218
	Volaris	208	37,232
San Antonio	Aeroméxico	365	36,010
	Interjet	630	108,570
	Volaris	343	61,397
Orlando	Aeroméxico	723	114,456
	JetBlue	538	80,700
	Volaris	54	9,666
Houston W. P. Hobby	Southwest Airlines	972	138,996
Washington Dulles	Aeroméxico	356	44,396
	United Airlines	365	51,144
Detroit	Aeroméxico	325	40,768
	Delta Air Lines	363	53,595
Newark	United Airlines	730	94,328
Fort Lauderdale	JetBlue	538	80,700
Portland	Aeroméxico	362	57,920
Seattle/Tacoma	Aeroméxico	362	57,920
Phoenix	American Airlines	403	55,918
Boston	Aeroméxico	348	55,680
Salt Lake City	Aeroméxico	9	1,116
	Delta Air Lines	365	48,180
Denver	Aeroméxico	77	11,816
	United Airlines	52	6,656
	Volaris	110	19,655
Charlotte	American Airlines	291	37,666
Austin	Aeroméxico	365	36,045
Orlando Sanford	Interjet	210	31,500
San José	Aeroméxico	92	14,720
Oakland	Volaris	57	10,203

Monterrey to the USA

Destination	Routes	Total Flights	Total Seats
Houston George Bush	Interjet	365	33,945
	United Airlines	2,462	187,249
	VivaAerobus	87	16,152
Dallas/Fort Worth	American Airlines	1,821	138,396
Atlanta	Aeroméxico	365	36,086
	Delta Air Lines	728	80,080
Detroit	Aeroméxico	337	33,302
	Delta Air Lines	320	42,240
Chicago O'Hare	United Airlines	724	55,024
	Volaris	80	14,100
Las Vegas	Aeroméxico	234	23,202
	Interjet	211	31,650
	VivaAerobus	4	732
Los Angeles	Aeroméxico	365	36,050
New York JFK	Aeroméxico	365	36,042
San Antonio	Interjet	313	29,109
Miami	American Airlines	365	27,740
Denver	Aeroméxico	9	684
	Volaris	23	3,830
Phoenix	United Airlines	1	213

Cancun to the USA

Destination	Routes	Total Flights	Total Seats
Dallas/Fort Worth	American Airlines	1,865	338,209
	Spirit Airlines	197	43,536
	Sun Country Airlines	290	48,720
Houston George Bush	Spirit Airlines	197	35,854
	United Airlines	2,089	366,092
New York JFK	American Airlines	588	94,080
	Delta Air Lines	869	139,600
	Interjet	353	52,950
	JetBlue	677	115,000
Atlanta	Delta Air Lines	2,067	360,974
	Southwest Airlines	252	37,700
Miami	American Airlines	2,173	347,680

Destination	Routes	Total Flights	Total Seats
Chicago O'Hare	American Airlines	629	100,640
	Spirit Airlines	237	47,467
	United Airlines	900	158,903
	VivaAerobus	26	4,836
Los Angeles	Delta Air Lines	588	95,440
	Interjet	342	51,300
	Southwest Airlines	243	34,749
	United Airlines	720	125,362
Newark	United Airlines	1,244	217,353
	VivaAerobus	23	4,278
Fort Lauderdale	JetBlue	384	57,600
	Southwest Airlines	729	104,247
	Spirit Airlines	245	55,860
	Charlotte	1,124	205,786
	American Airlines	1,124	205,786
Minneapolis	Delta Air Lines	617	114,683
	Sun Country Airlines	278	46,200
Denver	Southwest Airlines	288	43,136
	United Airlines	628	108,919
San Francisco	Interjet	139	20,850
	United Airlines	674	117,469
	Virgin America	5	745
Detroit	Delta Air Lines	586	106,570
	Spirit Airlines	179	31,765
Baltimore-Washington	Delta Air Lines	36	5,802
	Southwest Airlines	478	74,050
	Spirit Airlines	225	38,360
Philadelphia	American Airlines	689	117,794
Washington Dulles	Delta Air Lines	36	5,562
	United Airlines	556	96,126
Phoenix	American Airlines	515	91,215
Houston W. P. Hobby	Southwest Airlines	521	76,455
Orlando	Delta Air Lines	178	27,996
	JetBlue	301	44,550
Chicago Midway	Southwest Airlines	471	69,625
Salt Lake City	Delta Air Lines	313	51,044

Destination	Routes	Total Flights	Total Seats
Boston	American Airlines	41	6,560
	Delta Air Lines	110	17,408
	JetBlue	167	25,050
Austin	Southwest Airlines	196	28,284
	United Airlines	45	7,834
San Antonio	Southwest Airlines	75	12,677
	United Airlines	22	3,835
Nashville	American Airlines	41	5,376
	Delta Air Lines	36	5,526
	Southwest Airlines	27	3,861
Kansas City	American Airlines	42	6,720
	Delta Air Lines	34	5,442
Raleigh/Durham	American Airlines	41	5,248
	Delta Air Lines	34	5,297
	Southwest Airlines	9	1,287
Pittsburgh	American Airlines	27	3,456
	Delta Air Lines	36	5,562
	Southwest Airlines	9	1,287
New Orleans	Delta Air Lines	34	4,989
	Southwest Airlines	17	2,431
	United Airlines	11	1,898
Cleveland	United Airlines	57	8,994
Indianapolis	Delta Air Lines	34	5,638
	Southwest Airlines	22	3,146
St Louis-Lambert	Southwest Airlines	61	8,723
Port Columbus	Delta Air Lines	34	5,286
	Southwest Airlines	17	2,431
Seattle/Tacoma	Delta Air Lines	48	7,680
Cincinnati	Delta Air Lines	48	7,570
Hartford	Delta Air Lines	36	5,895
Tampa	Delta Air Lines	34	5,242
Milwaukee	Delta Air Lines	19	3,021

Guadalajara to the USA

Destination	Routes	Total Flights	Total Seats
Los Angeles	Aeroméxico	729	135,568
	Interjet	686	102,900
	VivaAerobus	269	49,518
	Volaris	1,285	242,657
Houston George Bush	United Airlines	1,437	140,926
	Volaris	159	28,461
Chicago O'Hare	Aeroméxico	488	90,768
	Interjet	350	53,718
	Volaris	113	20,227
Sacramento	Aeroméxico	365	67,430
	Volaris	363	64,977
San José	Aeroméxico	338	62,868
	Volaris	359	64,261
Dallas/Fort Worth	American Airlines	749	94,988
	Volaris	165	29,395
Fresno	Aeroméxico	325	58,092
	Volaris	366	65,374
San Francisco	Aeroméxico	331	61,540
	Interjet	139	20,850
	Volaris	205	36,695
Atlanta	Aeroméxico	365	36,086
	Delta Air Lines	307	49,418
Las Vegas	Interjet	134	20,100
	Volaris	360	64,440
Phoenix	American Airlines	358	28,196
	Volaris	213	38,127
Ontario	Volaris	355	63,545
Oakland	Volaris	345	61,755
Chicago Midway	Volaris	369	53,136
Portland	Volaris	215	38,345
New York JFK	Volaris	204	36,516
Salt Lake City	Aeroméxico	365	36,071
Miami	Volaris	201	35,979
San Antonio	Interjet	107	16,050
	Volaris	105	18,795
Seattle/Tacoma	Volaris	161	28,679

Destination	Routes	Total Flights	Total Seats
Denver	Volaris	155	27,745
Orlando	Volaris	154	27,566
Reno	Volaris	152	27,208
Austin	Volaris	106	18,974
Milwaukee	Volaris	102	18,258

Other routes:

Acapulco - Los Angeles (Volaris)

Acapulco - Houston (United Airlines)

Culiacán - Phoenix (Volaris)

Huatulco - Chicago (Volaris)

Huatulco - Houston (United Airlines)

Huatulco - Minneapolis (Sun Country Airlines)

León - Los Angeles (Aeroméxico, Interjet, United Airlines, Volaris)

León - Houston (United Airlines)

León - Dallas (American Airlines)

León - Atlanta (Aeroméxico)

León - Chicago (Volaris)

León - Oakland (Volaris)

León - Detroit (Aeroméxico)

Manzanillo - Houston (United Airlines)

Manzanillo - Phoenix (American Airlines)

Manzanillo - Minneapolis (Sun Country Airlines)

Mérida - Houston (United Airlines)

Mérida - Atlanta (Aeroméxico)

Mérida - Miami (American Airlines)

Morelia - Los Angeles (Volaris)

Morelia - Chicago (Volaris)

Morelia - Oakland (Volaris)

Morelia - Dallas (American Airlines)

Morelia - San José (Volaris)

Morelia - Houston (United Airlines)

Morelia - Fresno (Volaris)

Puebla - Houston (United Airlines)

Puebla - Dallas (American Airlines)

Querétaro - Houston (United Airlines)

Querétaro - Dallas (American Airlines)

Querétaro – Atlanta (American Airlines)
 Querétaro – Chicago (Volaris)
 Querétaro – Los Ángeles (Volaris)
 San Luis Potosí – Dallas (American Airlines)
 San Luis Potosí – Houston (United Airlines)
 Aguascalientes – Dallas (American Airlines)
 Aguascalientes – Houston (United Airlines)
 Aguascalientes – Los Angeles (Volaris)
 Chihuahua – Dallas (American Airlines)
 Chihuahua – Houston (United Airlines)
 Chihuahua – Denver (Volaris)
 Cozumel – Dallas (American Airlines & Sun Country Airlines)
 Cozumel – Atlanta (Delta Airlines)
 Cozumel – Houston (United Airlines)
 Cozumel – Miami (American Airlines)
 Cozumel – Minneapolis (Delta Airlines, Sun Country Airlines)
 Cozumel – Charlotte (American Airlines)
 Cozumel – Chicago (American Airlines & United Airlines)
 Cozumel – Denver (United Airlines)
 Cozumel – Detroit (Delta Airlines)
 Durango – Chicago (Volaris)
 Durango – Los Angeles (Volaris)
 Hermosillo – Phoenix (American Airlines)
 Ixtapa-Zihuanajuato – Chicago (United Airlines & Volaris)
 Ixtapa-Zihuanajuato – Houston (United Airlines)
 Ixtapa-Zihuanajuato – Minneapolis (Delta Airlines & Sun Country Airlines)
 Ixtapa – Zihuatanejo – Phoenix (American Airlines)
 Ixtapa – Zihuatanejo – Dallas (American Airlines)
 Mazatlán – Phoenix (American Airlines)
 Mazatlan – Dallas (American Airlines)
 Mazatlan – Minneapolis (Delta Airlines & Sun Country Airlines)
 Mazatlan – Houston (United Airlines)
 Mazatlan – Los Angeles (American Airlines)
 Mazatlan – Chicago (United Airlines)
 Mazatlan – Denver (Sun Country Airlines)
 Oaxaca – Los Angeles (Volaris)

Oaxaca - Houston (United Airlines)

Puerto Vallarta - Los Angeles (AA, Delta, Interjet, Southwest, United Airlines, Virgin America, Volaris).

Puerto Vallarta - Dallas (United Airlines & Sun Country Airlines)

Puerto Vallarta - Phoenix (American Airlines)

Puerto Vallarta - Houston (United Airlines)

Puerto Vallarta - Chicago (American Airlines & United Airlines)

Puerto Vallarta - San Francisco (United Airlines & Virgin America)

Puerto Vallarta - Denver (Southwest Airlines & United Airlines)

Puerto Vallarta - Atlanta (Delta Airlines)

Puerto Vallarta - Minneapolis (Delta Airlines & Sun Country Airlines)

Puerto Vallarta - Houston (Southwest Airlines)

Puerto Vallarta - Oakland (Southwest Airlines)

Puerto Vallarta - Salt Lake City (Delta Airlines)

Puerto Vallarta - Newark (United Airlines)

Puerto Vallarta - Detroit (Delta Airlines)

Puerto Vallarta - San Diego (Delta Airlines)

Puerto Vallarta - Seattle/Tacoma (Delta Airlines)

San Jose del Cabo - Los Angeles (AA, Delta, Interjet, Southwest, United)

San José del Cabo - Dallas (American Airlines & Spirit Airlines)

San José del Cabo - Phoenix (American Airlines)

San José del Cabo - Houston (Spirit Airlines & United Airlines)

San José del Cabo - San Francisco (United Airlines and Virgin America)

San José del Cabo - Chicago (American Airlines & United Airlines)

San José del Cabo - Denver (Southwest Airlines & United Airlines)

San José del Cabo - Atlanta (Delta Airlines)

San José del Cabo - Houston (Southwest Airlines)

San Jose del Cabo - Oakland (Southwest Airlines)

San José del Cabo - San Diego (Southwest Airlines)

San José del Cabo - Salt Lake City (Delta Airlines)

San José del Cabo - Santa Ana (Southwest Airlines)

San José del Cabo - Minneapolis (Delta Airlines & Sun Country Airlines)

San José del Cabo - Newark

San José del Cabo - Detroit

San José del Cabo - Charlotte

San José del Cabo - Seattle

San José del Cabo - San José

San José del Cabo – Sacramento

San José del Cabo – New York JFK

San José del Cabo – Baltimore -Washington

San José del Cabo – Washington Dulles (United Airlines)

San José del Cabo – Austin

San José del Cabo – Las Vegas

Tampico – Houston (United Airlines)

Source: Dirección General de Aeronáutica Civil (DGAC), from the Ministry of Transports and Comunicacions of Mexico

Travel Markets

Sales Distribution Network

Tour operators and major travel agencies are the primary distributors of travel in Mexico. The country has approximately 100 tour operators. About 25 of the tour operators are based in Mexico City, with offices in other major cities, such as Monterrey and Guadalajara.

Many specialized and mid-sized travel agencies run their own operations and group travel. About 3,000 Mexican travel agencies belong to the Mexican Association of Travel Agencies (AMAV). Preferred relationships between travel agencies and tour operators are mostly based on relationships and commission levels. Though Mexicans use the Internet for trip planning and research, tour operators still originate the majority of travel sales.

Source: Mexican Association of Travel Agencies (ABAV)

Information Sources Used by Mexicans to Plan a Trip

Source	2015 (%)	2016 (%)	Point Change
Airlines	55	53	-2.1
Personal Recommendation	25	23	-2.2
National/State/City Travel Office	15	16	1.9
Online Travel Agency	28	31	2.9
Travel Agency Office	11	10	-1.7
Corporate Travel Department	14	15	0.3
Travel Guides	5	5	-0.3
Tour Operator/Travel Club	6	4	-1.5
Other	4	4	0.3

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

Market Snapshot

- Canada and Mexico, in 2016, were still the top source-markets for inbound travel to the United States. About 19.3 million Canadians had U.S. overnight stays, which was 6.8-percent less than the year before. The level of Mexican arrivals in the United States, however, reached nearly 19 million in 2016 – a 1.9-percent increase
- Mexico remains a top priority market with strong long-term prospects. In 2016, Mexico was the second-largest source market for international visitation to the United States, showing seven years of growth, and is second only to China in terms of international spend. In 2017, the USA welcomed an estimated 17.3 million visitors from Mexico, a number set to grow to 19.8 million annual visitors by 2022.
- According to the most recent National Travel and Tourism Office forecast, the United States is expected to see a 14.5 percent increase in visitor volume over the next five years.
- Mexico's slow GDP growth, its unfavorable exchange rate with the dollar and Mexican elections could lead to sluggish travel volume. Despite this, Mexico will likely be a vital service-export market for the United States
- Though demand from Mexico has softened, Brand USA's December 2017 research found that 81 percent of Mexican international travelers are likely to visit the USA in the next two years, up from 78 percent in December 2016
- A recent study by the Mexican Internet Association (AMIPCI in Spanish) showed that Mexico has 70 million Internet users, 63 percent of the population. Mexicans spend eight hours a day on the Internet, on average. This reflects a 10-percent jump over the year before
- The primary online activity is accessing social media, following by accessing email and information searching that are growing. Online shopping and finances online are other main activities. Facebook remains the most relevant social media in Mexico; however, Instagram, LinkedIn and Snapchat are increasing.
- Smartphones are the primary device to access social media in Mexico (80 percent); pushing the use of Snapchat, Waze and Snapchat. Tablets are also widely used devices for Internet access and desktop computers are decreasing.

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office; Statistics Canada; Banco de Mexico. January 2018 <https://www.asociaciondeinternet.mx/es/estudios>

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 (VisiteOsUSA.com.br in Brazil), which is active in most markets where Brand USA markets the United States to international travelers
- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States.

SOCIAL MEDIA CHANNELS

In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles are used for global, consumer-facing promotions in English:

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

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

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

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

CHART 1

Digital Channels

MARKET	URL	Local Tagline	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	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://youku.com/gousacn Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局			
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSACo	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAFr	@VisitTheUSAFr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAFr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUSAdE	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAdE
India	GoUSA.in	Plan Your USA Trip Now	facebook.com/GoUSAin	@GoUSAin	#VisitTheUSA	VisitTheUSA	YouTube.com/GoUSAin
Japan	GoUSA.jp	今すぐ USAへの旅の計画を	facebook.com/GoUSAjp	@GoUSAjp	アメリカ旅行	VisitTheUSA	YouTube.com/GoUSAjp
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	facebook.com/VisitTheUSAmx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.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 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

Cultural/historical attractions	63%
Dining/gastronomy	53%
Urban attractions (nightlife/city tours)	52%
Local lifestyle	48%
Beaches/seaside attractions	45%

Top 5 Strongest Impressions of the USA

Diverse	44%
Trendy	36%
Arrogant	34%
Down-to-earth	31%
Adventurous	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: Mexico intercontinental travelers 2017.

Source: Brand USA Market Intelligence Study 2017.

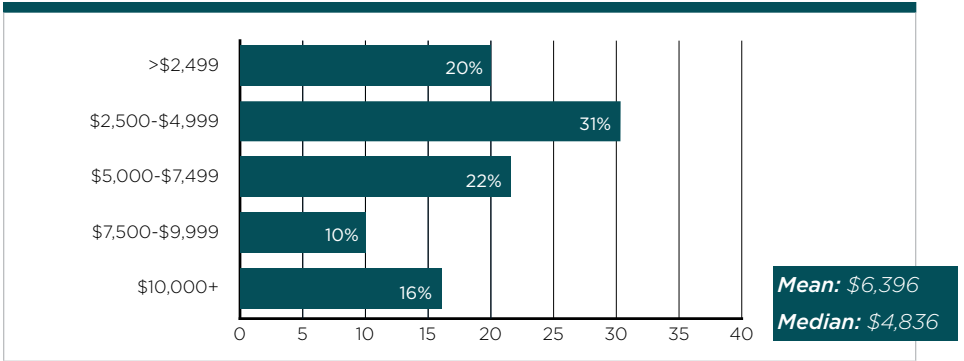
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Websites via computer or laptop	68%
Personal recommendations from family and friends	44%
Websites or applications via tablet	36%
Websites or applications via mobile phone	39%
Personal advice from travel professionals/ travel agents	27%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Mexico intercontinental travelers 2017.

Source: Brand USA Market Intelligence Study 2017.

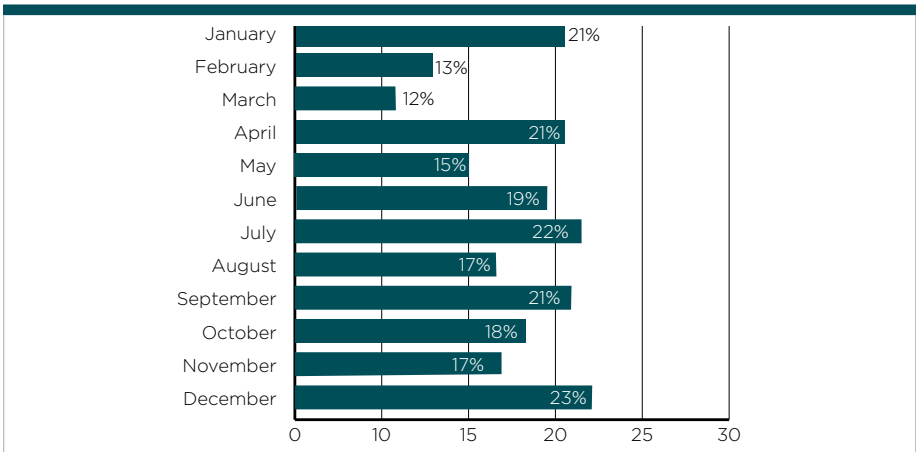
Expected Household Travel Spend for Next Intercontinental Trip



Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/ Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Mexico Intercontinental travelers 2017. Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

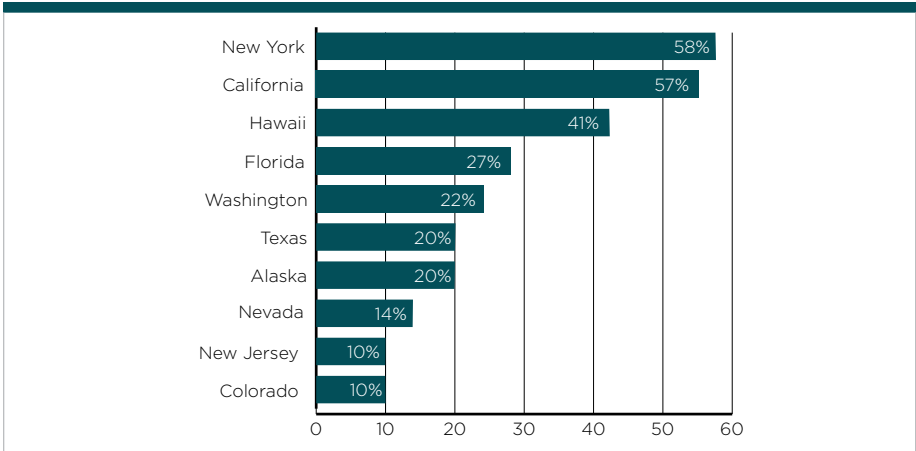
Months Traveled (April 2015–April 2017)



Question: During what month(s) did you take your holiday(s)? Base: Mexico intercontinental travelers 2017.

Source: Brand USA Market Intelligence Study 2017.

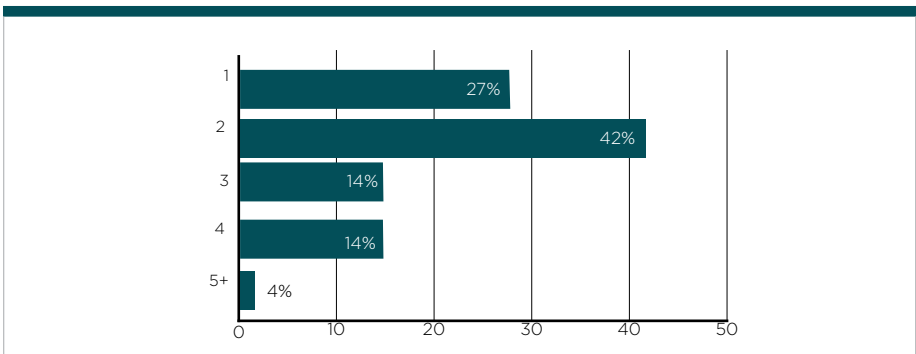
Destination Interest—Top 10 States



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

Source: Brand USA Market Intelligence Study 2017.

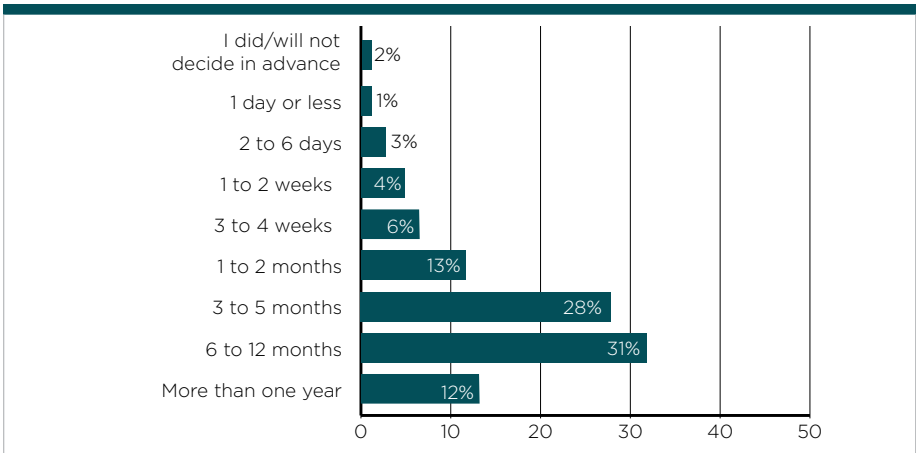
Expected Travel Party Size of Next Intercontinental Trip



Question: How many people in your household will go on this trip? Please count yourself as 1. Base: Mexico intercontinental travelers. Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

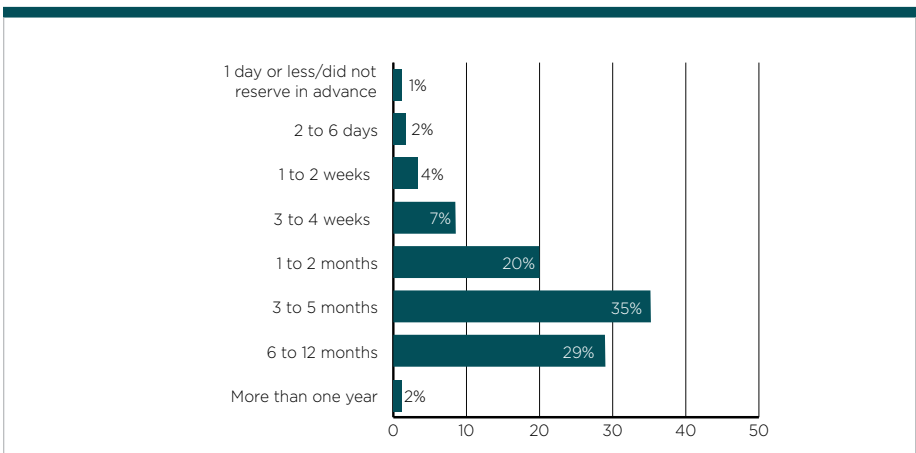
Destination Decision for Next International Trip



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: Mexico intercontinental travelers 2017. Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

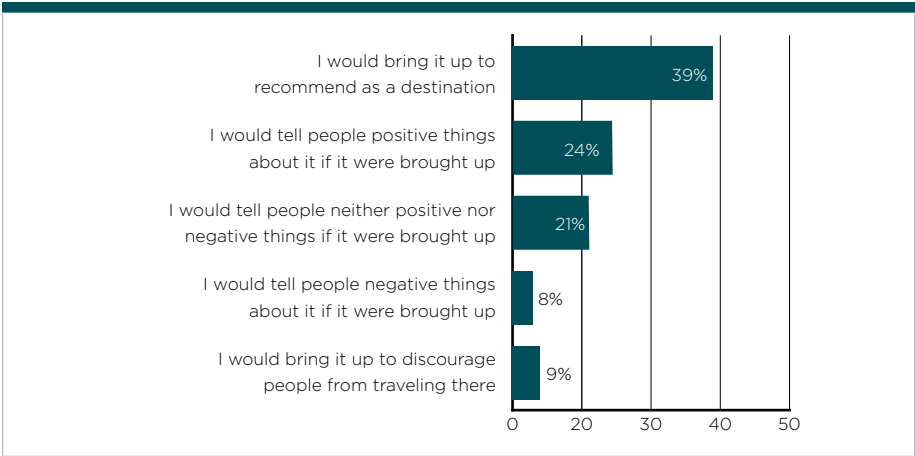
Air Booking for Next International Trip



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: Mexico intercontinental travelers. Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

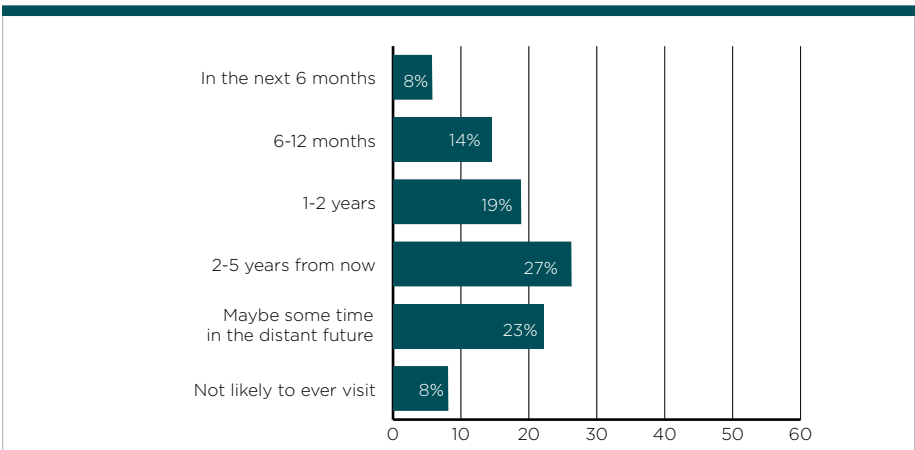
Net Promoter



Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries? Base: Mexico intercontinental travelers. Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

Likelihood of Travel to the USA



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

Source: Brand USA Market Intelligence Study 2017.

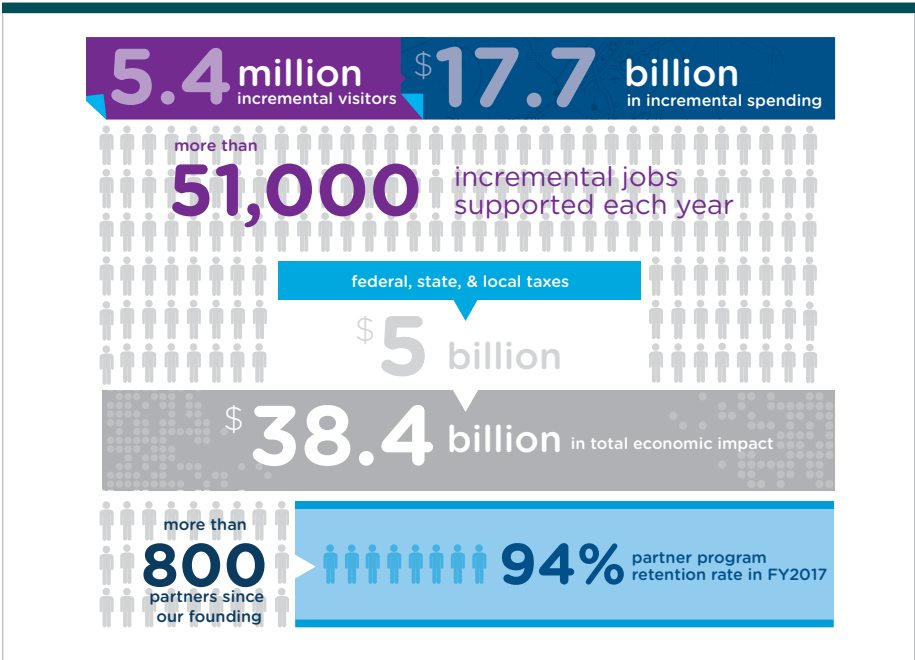
Brand USA Highlights

Brand USA is building on success.

With the support of its many partners worldwide, Brand USA has grown from a start-up organization (that launched its first full year in operation in 2012 with just 89 partners) to an organization that has worked with and been supported by over 800 partners worldwide.

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

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



Sources: ROI data provided by Oxford Economics.

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

- Increased active consumer engagement with Brand USA assets (website page views, social interaction and social ad engagement) by 29 percent in FY2017.

- Continued to execute the USA consumer campaign in 14 markets (Australia, Brazil, Canada, Chile, China, Colombia, France, Germany, India, Japan, South Korea, Mexico, Sweden, and the United Kingdom Colombia and Sweden). In total, these markets generate more than 80 percent of all international visitation to the United States.
- With the launch of a “social first” storytelling approach in 14 markets, including OOH, OLV, digital display, social, search, native, and influencer media, the “GO” campaign resulted in almost 6.5 billion impressions.
- Brought 23 percent more members of the travel trade to the USA via our three MegaFams, which included 287 travel agents (of which 49 were product developers) from three countries (China, United Kingdom & Ireland, and Mexico).
- Hosted three sales missions (to India, Japan/Korea and China) with 108 U.S. delegates who promoted their travel brands and destinations to more than 1,618 Buyers.
- Leveraged \$52.5 million in contributed media from 35 global media partners, plus an additional \$5.7 million of in-kind contributions, to promote travel to the USA directly to consumers in numerous international markets. This compares to \$49 million in contributed media from 29 global media partners in FY2016.
- Increased earned media exposure for corporate media relations efforts by 41 percent over FY2016, reaching 2.7 billion impressions and an ad equivalency of nearly \$230 million in FY2017.
- Generated more than \$100 million in industry contributions, including cash contributions of \$43.5 million (compared to \$53 million in FY2016) and in-kind contributions of \$66.3 million (compared to \$47 million in FY2016) in recognized revenue—representing 40 percent in cash contributions and 60 percent in in-kind contributions for the year.
- Grew Brand USA’s partnership network from 707 in FY2016 to 851 partners through FY2017 (a 20 percent increase).

By all these measures and more, Brand USA’s marketing efforts are working—effectively and efficiently.

Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA's cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets, including:

- Argentina
- Australia
- Austria
- Bahamas
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- France
- Germany
- Guatemala
- Honduras
- Hong Kong
- India
- Ireland
- Italy
- Japan
- 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, Mexico

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.

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.

Contact:

U.S. Commercial Service, Mexico City

Juan Carlos Ruiz

Commercial Assistant

juancarlos.ruiz@trade.gov

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.

14th & Constitution Avenue, NW
Washington, DC 20230
202.482.0140
ntto@trade.gov

Selected Staff List:

Isabel Hill

Director
Isabel.Hill@trade.gov

Brian Beall

Deputy Director, Policy and Planning
Brian.Beall@trade.gov

Julie Heizer

Team Lead, Industry Relations
Julie.Heizer@trade.gov

Jennifer Aguinaga

International Trade Specialist
Jennifer.Aguinaga@trade.gov

Mark Brown

Market Research Analyst
Mark.Brown@trade.gov

Richard Champley

Senior Research Analyst
Richard.Champley@trade.gov

Curt Cottle

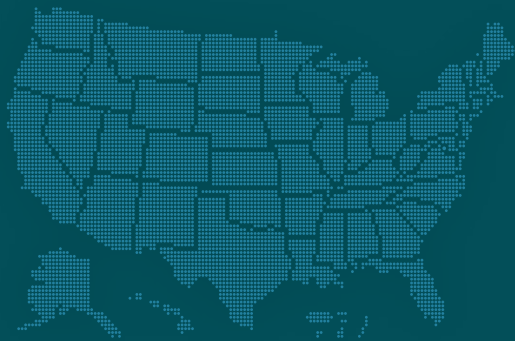
International Trade Specialist
Curt.Cottle@trade.gov

John Terpening

Economist
John.Terpening@trade.gov

Claudia Wolfe

Economist
Claudia.Wolfe@trade.gov



TheBrandUSA.com