



USA

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Brand USA

# Market Information 2018

## SOUTHEAST ASIA



Cover images: New York City, New York and Los Angeles, California

# 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 Southeast Asia, 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](http://TheBrandUSA.com). For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at [VisitTheUSA.com](http://VisitTheUSA.com).

## Brand USA Headquarters

1725 Eye Street NW

Eighth Floor

Washington, DC 20006 USA

Phone: +1 202.536.2060

Email: [info@TheBrandUSA.com](mailto: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 Southeast Asia’s outbound-travel sector.



Southeast Asia continues to be an expanding source-market for travel to the United States. The region — which covers Singapore, Malaysia, Indonesia, the Philippines, Thailand and Vietnam — is relatively untapped. It’s a region with a population of more than 560 million.

This guide will familiarize you with the factors that influence travel from Southeast Asia to the United States.

A major transportation hub for this part of the world is Singapore’s Changi Airport. As the sixth-busiest international airport, Changi, served a record 62.2 million global passengers in 2017. It has 100 airlines that offer service to 400 cities around the world. This translates into 7,200 flights a week, or one every 80 seconds. In March, Changi was named the “world’s best airport” for the sixth consecutive year at the 2018 Skytrax World Airport Awards, held in Sweden.

Speaking of air travel, Singapore Airlines is launching nonstop flights from Singapore to both New York and Los Angeles in 2018 aboard a new, ultra-long-range version of the Airbus A350. The airline presently flies from Singapore to San Francisco with the A350. And, late in 2017, United Airlines began daily nonstop service between Singapore and Los Angeles.

Earlier this year, Brand USA introduced 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 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.

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 continues to be relevant, engaging and authentic.

I invite you to talk to our team about trip experiences in the USA and ways to enhance your marketing efforts in Southeast Asia. They can discuss with you many ways to inspire travelers from this region to book their USA trips now.

In October, for instance, Brand USA and a contingent of its partners, will exhibit at ITB Asia in Singapore for the sixth-straight year. As Southeast Asia's foremost travel-trade exposition, ITB Asia presents buyers with a range of products that span leisure, corporate and MICE (meetings, incentives, conferences, and exhibitions) travel.

Also, BrandStory, which has an office in Singapore, continues to be Brand USA's in-market representation firm.

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

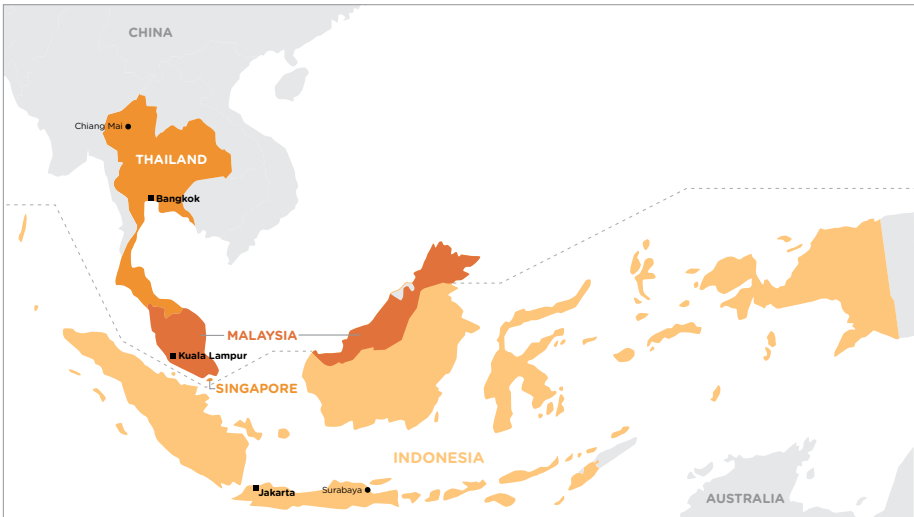
CRheem@TheBrandUSA.com

### **Aaron Wodin-Schwartz**

Vice President, Public Policy & Public Affairs

AWodinSchwartz@TheBrandUSA.com

# Geography



## Area

### Malaysia

329,847 sq km  
(slightly larger than  
New Mexico)

### Philippines

300,000 sq km  
(slightly less than twice the size of  
Georgia; slightly larger  
than Arizona)

### Thailand

413,120 sq km  
(slightly more than twice the size of  
Wyoming)

### Indonesia

1,904,569 sq km  
(slightly less than three times the size  
of Texas)

### Singapore

697 sq km  
(slightly more than 3.5 times the size of  
Washington, D.C.)

### Vietnam

331,210 sq km  
(slightly larger than New Mexico)

Source: CIA World Factbook 2018



## Climate

Malaysia, the Philippines, Singapore, Indonesia, Thailand and Vietnam all have a tropical climate with hot, humid and rainy conditions.

### Malaysia

Hot temperatures and tropical rain showers run throughout the year. The wettest season on the east coast is between November and February – which is when the west coast has sunshine and dry conditions. The heaviest rainfall on the west coast occurs April to October – when the opposite is true on the east coast.

### Philippines

Heavy rains from the Southwest Monsoon hit the far-flung islands of the Philippines, June to September. August is generally when the most severe cyclones occur.

### Singapore

With a location close to the equator, Singapore has a tropical rainforest climate. It has mostly consistent weather conditions – hot temperatures, frequent showers. Wettest months are November through January.

### Indonesia

Like the Philippines, Indonesia is an archipelago, or chain of islands, with varied geological features that can affect the weather. Generally, hot and humid, Indonesia has its most rain from November to April. June to September is the driest period.

### Thailand

The rains of the Southwest Monsoon are most apparent in Thailand between June and October. September tends to be the wettest month. With the Northeast Monsoon season, November into March, drier and cooler conditions arrive. Some areas, the Kra Isthmus (in southern Thailand), for instance, are always hot and humid.

### Vietnam

With 2,000 miles of coastline, Vietnam has several weather systems that vary by region. In Hanoi and northern areas, conditions are hot and humid with heavy rainfall, May to October. Central Vietnam has hot, dry weather, January to August. Southern Vietnam is hot and dry, November to April, with the greatest amount of rain, June through August.

# Demographics

## Population

### Malaysia

31,381,992 (July 2017 est.)

### Philippines

104,256,076 (July 2017 est.)

### Thailand

68,414,135 (July 2017 est.)

### United States

326,625,791 (July 2017 est.)

### Indonesia

260,580,739 (July 2017 est.)

### Singapore

5,888,926 (July 2017 est.)

### Vietnam

96,160,163 (July 2017 est.)

Source: CIA World Factbook 2018

## Population by Age

Age	USA	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
<b>0-14 years</b>	18.73%	25.02%	27.83%	33.39%	12.82%	16.93%	23.55%
<b>15-24 years</b>	13.27%	16.99%	16.81%	19.16%	16.56%	14.17%	16.23%
<b>25-54 years</b>	39.45%	42.4%	41%	36.99%	50.53%	46.32%	45.56%
<b>55-64 years</b>	12.91%	8.58%	8.27%	5.97%	10.46%	12%	8.55%
<b>65 years and older</b>	15.63%	7.01%	6.1%	4.49%	9.63%	10.58%	6.12%
<b>Median age</b>	38.1 years	30.2 years	28.5 years	23.5 years	34.6 years	37.7 years	30.5 years
<b>Population growth rate (2017 est.)</b>	0.81%	0.86%	1.37%	1.57%	1.82%	0.3%	0.93%

Source: CIA World Factbook 2018

# Economy

## Malaysia

**GDP:** \$926.1 billion (2017 est.)  
**GDP real growth rate:** 5.4% (2017 est.)  
**GDP—per capita:** \$28,900 (2017 est.)  
**Unemployment rate:** 3.4% (2017 est.)  
**Inflation rate:** 3.8% (2017 est.)

## Philippines

**GDP:** \$874.5 billion (2017 est.)  
**GDP real growth rate:** 6.6% (2017 est.)  
**GDP—per capita:** \$8,200 (2017 est.)  
**Unemployment rate:** 6% (2017 est.)  
**Inflation rate:** 3.1% (2017 est.)

## Thailand

**GDP:** \$1.229 trillion (2017 est.)  
**GDP real growth rate:** 3.7% (2017 est.)  
**GDP—per capita:** \$17,800 (2017 est.)  
**Unemployment rate:** 0.7% (2017 est.)  
**Inflation rate:** 0.6% (2017 est.)

## Indonesia

**GDP:** \$3.243 trillion (2017 est.)  
**GDP real growth rate:** 5.2% (2017 est.)  
**GDP—per capita:** \$12,400 (2017 est.)  
**Unemployment rate:** 5.4% (2017 est.)  
**Inflation rate:** 4% (2017 est.)

## Singapore

**GDP:** \$513.7 billion (2017 est.)  
**GDP real growth rate:** 2.5% (2017 est.)  
**GDP—per capita:** \$90,500 (2017 est.)  
**Unemployment rate:** 2.2% (2017 est.)  
**Inflation rate:** 0.9% (2017 est.)

## Vietnam

**GDP:** \$643.9 billion (2017 est.)  
**GDP real growth rate:** 6.3% (2017 est.)  
**GDP—per capita:** \$6,900 (2017 est.)  
**Unemployment rate:** 2.3% (2017 est.)  
**Inflation rate:** 4.4% (2017 est.)

Source: CIA World Factbook 2018

# Vacation Allocation

## Primary Travel Periods

### Malaysia

- Mid March (1 week)
- Early June - Mid June (2 weeks)
- Mid August (1 week)
- Late November - Late December (5 weeks)

### Philippines

- April - June
- October - December

### Thailand

- November - Late March
- November - February

### Indonesia

- Peak travel period is during the dry season between April and October

### Singapore

- Mid March - Late March (2 weeks)
- June (4 weeks)
- Mid September (1 week)
- Late November - Late December (6 weeks)

### Vietnam

- Mid October (1 week)
- Mid December - Late December (2 weeks)
- Mid February - Late February (2 week)

## Public School Terms

### Malaysia

- Early January - Mid March
- Late March - Early June
- End June - Mid August
- Late August - Late November

### Philippines

- Early January - Late March
- Mid June - Mid October
- Early November - Late December

### Thailand

- Mid May - Mid July
- Late July - Late September
- Mid October - Mid December
- Early January - Mid March

### Indonesia

- Mid July - Late November
- Early January - Mid June

### Singapore

- Early January - Mid March
- End March - End May
- End June - Early September
- Mid September - Mid November

### Vietnam

- End August - Early October
- End October - Mid December
- Mid January - Early February
- Mid February - End March
- Mid April - Mid June

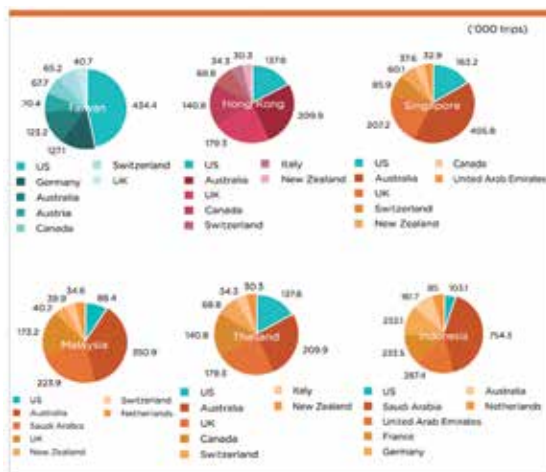
# International Visitation Trends



Source: Euromonitor International 2016



Source: Euromonitor International 2016



Source: Euromonitor International 2016

	Taiwan			
	(USD million)			
	2016	2017	2018	2019
<b>Business</b>	2,673.64	2,773.20	2,894.51	3,016.13
<b>Leisure</b>	12,481.61	12,927.07	13,427.78	13,969.22
<b>Lodging</b>	6,386.92	6,576.24	6,757.07	7,020.98
<b>Activities</b>	1,874.31	1,903.23	1,938.80	2,014.52
<b>Food</b>	2,634.15	2,720.05	2,808.35	2,918.03
<b>Shopping</b>	2,835.94	2,830.15	2,823.68	2,933.97
<b>Others</b>	417.15	652.90	963.87	1,027.09

### Hong Kong

(USD million)

	2016	2017	2018	2019
<b>Business</b>	5016.03	5274.44	5545.72	5836.6
<b>Leisure</b>	19,443.44	20,408.76	21,418.44	22,519.10
<b>Lodging</b>	6,247.0	6,427.9	6,590.9	6,921.8
<b>Activities</b>	6,898.1	7,243.5	7,602.1	7,983.7
<b>Food</b>	2,367.9	2,446.1	2,523.2	2,649.8
<b>Shopping</b>	3,685.1	3,908.8	4,147.8	4,356.1
<b>Others</b>	3,649.86	4,013.58	4,425.20	4,685.39

### Singapore

(USD million)

	2016	2017	2018	2019
<b>Business</b>	8,318.8	8,703.7	9,140.6	9,544.2
<b>Leisure</b>	14,443.6	15,172.6	15,950.2	16,790.8
<b>Lodging</b>	3,270.3	3,428.7	3,599.3	3,786.8
<b>Activities</b>	2,174.6	2,220.8	2,270.6	2,322.1
<b>Food</b>	2,343.2	2,418.4	2,502.7	2,592.0
<b>Shopping</b>	6,328.7	6,652.3	7,001.1	7,374.0
<b>Others</b>	5,594.7	6,018.8	6,486.1	6,925.8

Source: Euromonitor International 2016



Malaysia				
	(USD million)			
	2016	2017	2018	2019
Business	8,047.45	8,593.23	9,352.08	10,093.28
Leisure	2,866.21	3,076.21	3,351.73	3,652.01
Lodging	2,180.42	2,322.39	2,483.79	2,633.51
Activities	1,201.31	1,269.30	1,352.86	1,435.18
Food	1,535.11	1,625.55	1,728.64	1,834.22
Shopping	3,280.73	3,504.31	3,751.94	3,976.18
Others	1,804.00	1,982.18	2,354.66	2,771.85

Indonesia				
	(USD million)			
	2016	2017	2018	2019
Business	2,266.06	2,394.12	2,512.81	2,670.17
Leisure	5,558.93	5,933.40	6,296.83	6,760.72
Lodging	1,377.17	1,484.73	1,589.99	1,691.28
Activities	558.85	584.44	613.02	644.90
Food	1,028.55	1,101.06	1,179.13	1,263.20
Shopping	3,295.08	3,404.47	3,489.93	3,549.25
Others	953.82	1,109.00	1,264.40	1,583.24

Source: Euromonitor International 2016

Thailand				
	(USD million)			
	2016	2017	2018	2019
<b>Business</b>	354.41	374.48	397.44	418.99
<b>Leisure</b>	5,653.69	6,029.73	6,474.75	6,912.13
<b>Lodging</b>	1,720.87	1,824.13	1,940.87	2,067.03
<b>Activities</b>	594.43	621.18	651.00	6,835.50
<b>Food</b>	1,015.07	1,081.05	1,154.56	1,237.68
<b>Shopping</b>	1,662.41	1,745.53	1,850.24	1,977.96
<b>Others</b>	513.80	608.23	721.02	786.54

Source: Euromonitor International 2016

# Market Snapshot

## Fast-Growing Middle Class in Southeast Asia

Southeast Asia includes the ASEAN nations of Brunei, Indonesia, Malaysia, Myanmar, Singapore, Thailand, The Philippines, and Vietnam. It is the 3rd largest in the world after China with travel market of 633 million residents. With a stable and consistent economic growth, outbound travel from ASEAN to the U.S. increased from 2014 to 2015 by an overall average of 6% to almost 780,000 visitors from the eight ASEAN markets. According to NTTO, 150,000 of Singapore Travelers has traveled to the USA in 2016.

Changi Airport in Singapore is the 6th busiest airport in the world and the aviation hub in Southeast Asia. The region has seen a series of airlines developments enhancing air connectivity to the USA.

- Year 2016: United Airlines launched non-stop flight to San Francisco.
- October 2017, United Airlines will be launching a daily non-stop flights between Singapore and Los Angeles on Oct 27.
- June 2017, Air Asia X, the long haul arm of Air Asia have launched their one-stop services from Kuala Lumpur, Malaysia to Honolulu, Hawai'i four times weekly.
- Year 2017: United Airlines launched non-stop flight to Los Angeles.
- Year 2017: Singapore Airlines launched non-stop flight to San Francisco.
- Year 2017: Garuda Indonesia is planning to re-operate its flight service U.S. via transit in Japan before heading to Los Angeles or New York.
- Year 2018: Singapore Airlines is planning to launch its non-stop service from Singapore to New York and Los Angeles via a new ultra-long-range variant of the Airbus A350 aircraft.
- Year 2018: Scoot (subsidiary of Singapore Airlines) plans to launch non-stop flight to Hawaii via Osaka, Japan.
- Year 2018: Singapore Airlines plans to launch non-stop flight to New York.
- Year 2019: Singapore Airlines plans to launch non-stop flight to Los Angeles.

# 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
- YouTube: YouTube.com/VisitTheUSA
- Twitter: @VisitTheUSA
- Instagram: VisitTheUSA
- Facebook: Facebook.com/VisitTheUSA

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

- Global: #VisitTheUSA
- Great Outdoors: #OutdoorsUSA
- Flavors/Culinary: #TasteUSA
- Market the Welcome: #USAWelcome
- Road Trips: #RoadTripUSA

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	<b>Tencent Weibo</b> (Chinese microblogging site): <a href="http://t.qq.com/DiscoverGoUSA">http://t.qq.com/DiscoverGoUSA</a> <b>Youku</b> (YouTube equivalent): <a href="http://i.youku.com/gousacn">http://i.youku.com/gousacn</a> <b>Wechat</b> (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

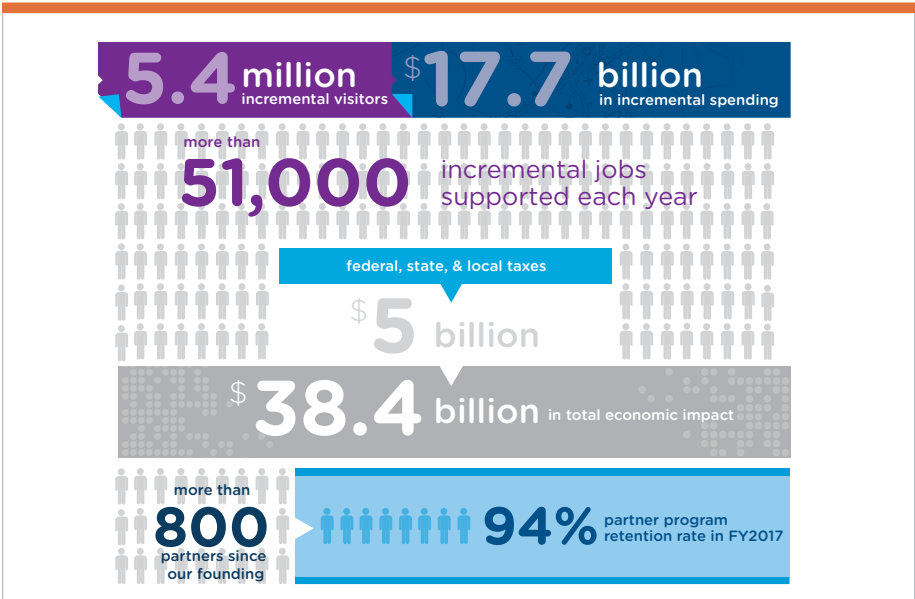
# Brand USA Highlights

## 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, Hong Kong, Taiwan, Thailand and Indonesia

## 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.

### Contacts:

#### Hong Kong

##### **Thomas Scruby, Chairman**

Thomas.Scruby@aa.com

#### Taiwan

##### **Brenda Tang, Chair**

Brenda.Tang@united.com

#### Thailand

##### **Joe Mannix, Chair**

Joe.Mannix@united.com

#### Indonesia

##### **David Kincaid, Chair**

David.Kincaid@trade.gov

# 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.

## Contact:

### Indonesia

#### **David Kincaid**

Trade and Investment Officer  
david.kincaid@trade.gov

#### **Fidhiza (Disa) Purisma**

Commercial Specialist  
fidhiza.purisma@trade.gov

### Malaysia

#### **Tracy Yeoh**

Commercial Specialist  
tracy.yeoh@trade.gov

#### **Janet Suan**

Commercial Specialist  
janet.suan@trade.gov

## Philippines

### **John Giray**

Commercial Assistant

john.giray@trade.gov

## Singapore

### **Chan Y K**

Commercial Specialist

yiukei.chan@trade.gov

### **Clint Brewer**

Regional Commercial Officer- ASEAN

Clint.brewer@trade.gov

## Thailand

### **Ora Boonyalug**

Commercial Specialist

oraphan.boonyalug@trade.gov

## Vietnam

### **Joshua Leibowitz**

Commercial Officer

joshua.leibowitz@trade.gov

### **Tran Lan**

Tran.Lan@trade.gov

## Myanmar (Burma)

### **Ummay Aiman**

Ummay.Aiman@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



