



USA

VisitTheUSA.de

Brand USA

Market Information

GERMANY, AUSTRIA
& SWITZERLAND

2020

About This Guide

This market guide includes a snapshot of the economies in Germany, Austria, and Switzerland, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Cover photo: Hamburg, Germany

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Brand USA



Who We Are

Our Mission

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.

Building on Success

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 with more than 900 contributing organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

Photos: Vienna, Austria (left); Neuschwanstein Castle, Hohenschwangau, Germany (right)



Our Partnerships

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.

According to studies by Oxford Economics, over the past seven years, Brand USA's marketing initiatives have helped welcome 7.5 million incremental visitors to the USA, benefiting the U.S. economy with nearly \$55 billion in total economic impact, and supporting more than 50,000 incremental jobs each year.

Learn More

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



As the destination storytellers for the United States of America, Brand USA helps drive our nation's economy, create jobs, and bring the people of the world closer together. This guide is designed to assist you in generating business from the Germany, Austria, and Switzerland outbound-travel sectors. And, while it includes data from our fiscal year 2019, it's important to acknowledge the unprecedented impact of

COVID-19 in 2020. The global pandemic has resulted in tremendous loss for many families and has had a devastating impact on the travel industry. All of this makes Brand USA's work even more critical. We are uniquely positioned to help guide the industry out of this crisis.

Our forward-thinking marketing approaches allow us to capture the attention of global audiences in new, more compelling ways which ensure the United States stays top-of-mind as an aspirational travel destination. In September 2019, we debuted Brand USA Travel Week Europe. This event provided partners a cost-effective way to directly engage travel trade professionals from 20 European countries, including well-known and emerging markets. During the event, we detailed our *One Europe* strategy which considers the impact of Europe as a whole, with 14.5 million collective visitors to the United States in 2018. This *One Europe* strategy allows us to better leverage and amplify initiatives and partnerships, including those with tour operators, airlines and media who are all buying, reporting and distributing across borders.

Germany, Austria, and Switzerland together account for more than \$10 billion in spend and more than 2.5 million visitors. Germany is the sixth largest overseas source market for the United States with 2.1 million people traveling to the United States. Switzerland is the 18th largest overseas source market with 474,550 people visiting the United States. According to the U.S. National Travel and Tourism Office, the top four activities visitors from



Germany and Switzerland want are shopping, sightseeing, exploring national parks, and visiting small towns.

Brand USA uses many voices to showcase the diverse people and places across the United States in a way that inspires and encourages wanderlust. In FY2019, Brand USA launched the *United Stories* campaign giving voices to real travel experiences from a variety of perspectives including locals, international visitors, category experts and the creative class. We continued to stream content through the GoUSA TV streaming and YouTube channels, which offer a variety of short, medium, and long-form content about a diversity of travel experiences.

As you consider resources, please know Brand USA has a dedicated travel-trade website which provides a more effective and efficient platform for industry professionals to navigate information about U.S. travel. In addition, please don't hesitate to reach out to our team about U.S. destinations, the opportunities we offer to enhance your marketing efforts, and the most effective ways to inspire travelers to book trips to the USA.

We look forward to working with you in the months ahead to generate business to the United States from the German, Austrian, and Switzerland region.

Together, we are marketing the USA!

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Market Facts



Geography

Largest Metropolitan Areas



Germany

Berlin (capital):

3.562 million

Hamburg: 1.790 million

Munich: 1.538 million

Cologne: 1.119 million

Austria

Vienna (capital):

1.930 million

Switzerland

Zürich: 1.395 million

Bern (capital): 430,000

Photos: Salzburg, Austria (left); Styria, Austria (right)
Source: CIA World Factbook 2020

Area

Germany

357,022 km²

Slightly smaller than Montana

Austria

83,871 km²

About the size of South Carolina

Switzerland

41,277 km²

Slightly less than twice the size of New Jersey

Climate

Germany

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

Austria

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

Switzerland

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

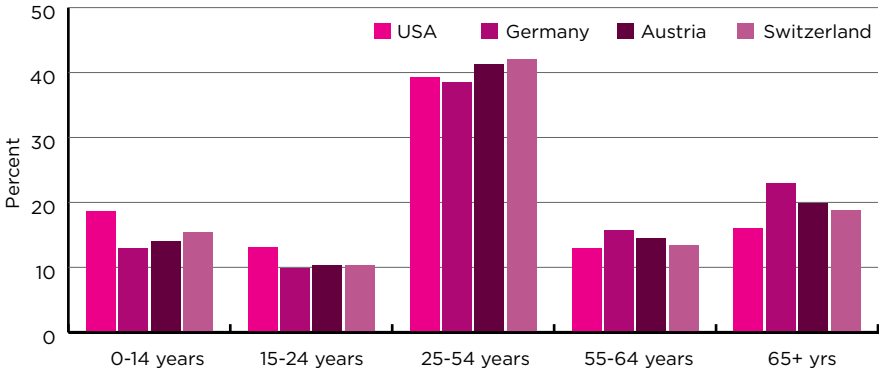
Demographics

Population

	Germany	Austria	Switzerland	USA
Population Size	80,159,662	8,859,449	8,403,994	332,639,102
Median Age	47.8 years	44.5 years	42.7 years	38.5 years
Population Growth Rate (2018 est.)	-0.19%	0.35%	0.66%	0.72%



Population by Age



Economy

Germany

- **GDP:** \$4.2 trillion
- **GDP Real Growth Rate:** 2.5%
- **GDP—Per Capita:** \$50,800
- **Unemployment Rate:** 3.8%
- **Inflation Rate:** 1.7%

Switzerland

- **GDP:** \$523.1 billion
- **GDP Real Growth Rate:** 1.7%
- **GDP—Per Capita:** \$62,100
- **Unemployment Rate:** 3.2%
- **Inflation Rate:** 0.5%

Austria

- **GDP:** \$441 billion
- **GDP Real Growth Rate:** 3%
- **GDP—Per Capita:** \$50,000
- **Unemployment Rate:** 5.5%
- **Inflation Rate:** 1.7%

Vacation Allocation

Vacation Allocation and Public Holidays

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

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

Primary Travel Periods and Public School Holidays 2020

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

Travel Trends

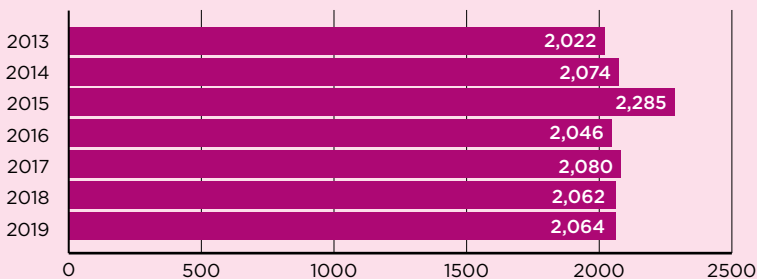


International Travel Trends: Germany

Spending Trends: Exports (millions of U.S. dollars)

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$7,664	\$8,295	\$8,986	\$8,136	\$8,246	\$8,357	\$8,314
Travel Receipts	\$6,023	\$6,440	\$7,180	\$6,522	\$6,557	\$6,575	\$6,563
Passenger Fare Receipts	\$1,641	\$1,855	\$1,806	\$1,614	\$1,689	\$1,782	\$1,751
Change (%) in Total Exports	3	8	8	-9	1	1	-1

Visitation Trends: Arrivals

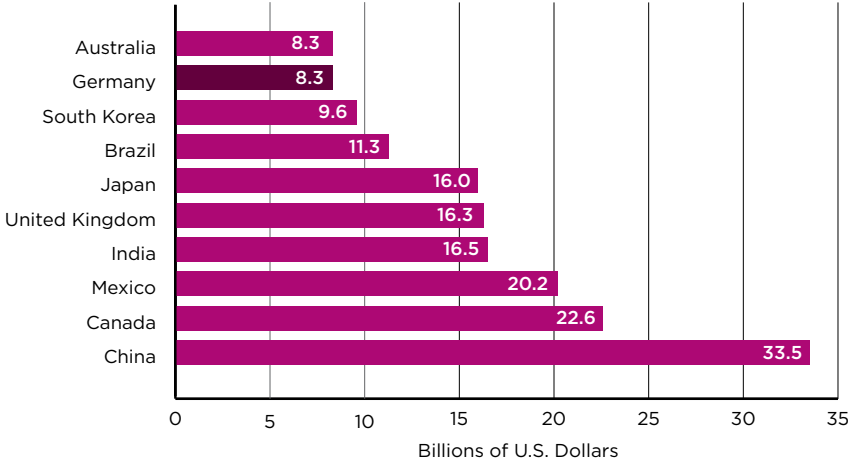


Photos: Vienna, Austria (left), Hallstatt, Austria (right)

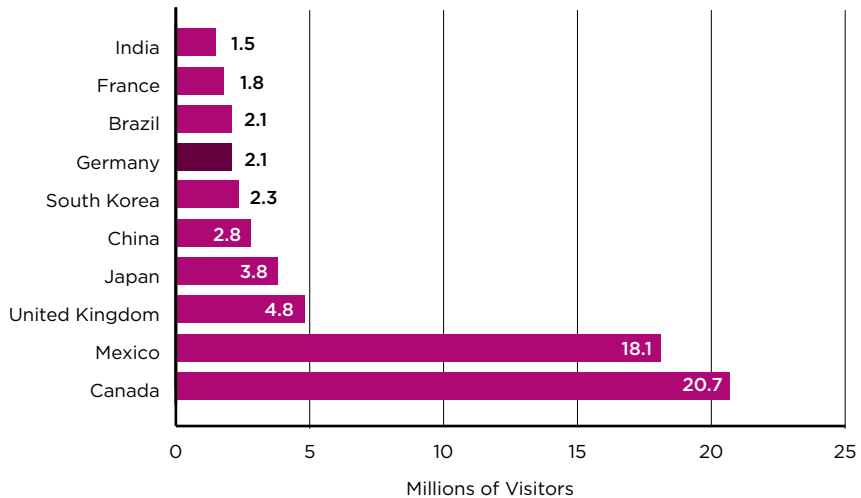
Source: U.S. Department of Commerce, National Travel and Tourism Office

Inbound Travel Trends: Germany

Visitor Spending



International Arrivals to the USA



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



Traveler Characteristics: Germany

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	57.7	60.1
Visit Friends/Relatives	19.3	18.7
Business	14.1	12.0
Convention/Conference/Trade Show	5.4	6.0
Education	2.9	2.6
Religion/Pilgrimages	0.0	0.3
Health Treatment	0.2	0.1
Other	0.3	0.3

All Purposes of Trip

All Purposes of Trip	2018 (%)	2019 (%)
Vacation/Holiday	67.8	72.2
Visit Friends/Relatives	31.8	29.7
Business	16.9	14.0
Convention/Conference/Trade Show	7.2	8.1
Education	4.7	4.7
Religion/Pilgrimages	0.4	0.8
Health Treatment	0.3	0.2
Other	0.7	0.5
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	80.5	83.2
Business & Convention	21.8	20.3

Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean Nights)	16.2	16.9
Length of Stay in USA (Median Nights)	11	11
First International Trip to the USA	19.0%	20.4%

U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/Regions	2018 (%)	2019 (%)
REGIONS		
East North Central	9.43	8.80
Middle Atlantic	34.35	34.79
Mountain	15.76	15.09
New England	6.76	6.29
Pacific	25.58	24.02
South Atlantic	27.45	28.91
West South Central	7.30	5.96
STATES/TERRITORIES		
Arizona	5.60	5.65
California	23.77	21.76
Florida	16.87	17.58
Massachusetts	5.04	5.05
New York	30.77	32.00
Nevada	10.94	11.03
Washington, DC	5.89	6.79
CITIES		
Las Vegas	10.38	10.63
Los Angeles	14.00	12.76
Miami	9.51	9.13
New York City	29.98	31.07
Orlando	5.85	5.42
San Francisco	12.17	12.28

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

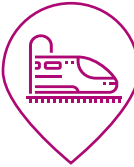


Transportation Used in the USA



42%

Auto, rented



39%

City subway/
tram/bus



32%

Auto, private
or company



23%

Air travel
between
U.S. cities



21%

Taxicab/
limousine



13%

Bus between
U.S. cities

Activity Participation While in the USA



82%

Shopping



81%

Sightseeing



44%

National parks/
monuments



40%

Small towns/
countryside



37%

Historic locations



32%

Art gallery/
museum



29%

Experience fine
dining



24%

Guided tours



19%

Amusement
parks



18%

Cultural/ethnic
heritage sites

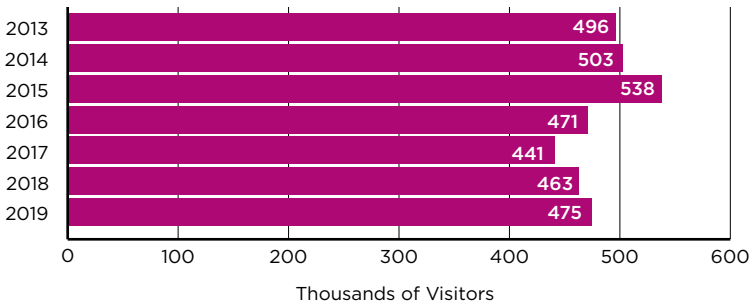
International Travel Trends: Switzerland

Spending Trends: Exports (millions of U.S. dollars)

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$2,580	\$2,712	\$2,815	\$2,542	\$2,404	\$2,474	OCT
Travel Receipts	\$1,864	\$1,919	\$2,040	\$1,785	\$1,657	\$1,722	OCT
Passenger Fare Receipts	\$716	\$793	\$775	\$757	\$747	\$752	OCT
Change (%) in Total Exports	0	5	4	-10	-5	3	OCT

OCT: Data to be released October 2020

Visitation Trends: Arrivals





Traveler Characteristics: Switzerland

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Business	11.0	8.8
Convention/Conference/Trade Show	6.7	8.7
Education	4.1	4.3
Health Treatment	0.3	0.0
Vacation/Holiday	60.4	55.0
Visit Friends/Relatives	16.5	23.1
Religion/Pilgrimages	0.0	0.1
Other	1.0	0.0

All Purposes of Trip

All Purposes of Trip	2018 (%)	2019 (%)
Business	12.3	10.7
Convention/Conference/Trade Show	9.3	9.1
Education	6.2	5.2
Health Treatment	0.7	3.9
Vacation/Holiday	72.0	73.2
Visit Friends/Relatives	30.0	37.3
Religion/Pilgrimages	0.6	0.4
Other	1.1	0.0
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	85.0	86.2
Business & Convention	20.4	18.6

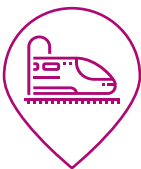
Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean Nights)	14.1	13.6
Length of Stay in USA (Median Nights)	10.0	10.0
First International Trip to the USA	17.8%	17.9%

U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/Regions	2018 (%)	2019 (%)
REGIONS		
Middle Atlantic	39.73	38.56
Pacific	26.28	N/A
South Atlantic	29.48	N/A
STATES/TERRITORIES		
California	26.17	N/A
New York	36.38	34.44
CITIES		
New York City	34.31	34.03

Transportation Used in the USA



39%

City subway/
tram/bus



36%

Auto, private
or company



36%

Auto, rented



31%

Taxicab/
limousine



26%

Ride-sharing
service



20%

Air travel
between
U.S. cities



Activity Participation While in the USA



86%

Shopping



82%

Sightseeing



42%

National parks/
monuments



34%

Experience fine
dining



34%

Small towns/
countryside



33%

Art gallery/
museum



26%

Historic locations



22%

Amusement
parks



17%

Guided tours



18%

Cultural/ethnic
heritage sites

Market Snapshot



Germany

Overall Economic Situation

Germany's economic growth is projected to decline but remain solid, backed by strong job creation and a fiscal stimulus. That's according to a statement issued in November 2018 by the Organization for Economic Cooperation and Development (OECD) on the country's current and projected economic outlook. It further said trade-related uncertainties and moderating world demand will weigh on exports. Private consumption will accelerate due to strong wage growth and fiscal measures that increase household disposable income. Low interest rates, high capacity utilization, and growing housing demand will support residential and business investment. The current account surplus will fall as stronger domestic demand fuels imports. Strong cyclical revenue growth will keep the fiscal balance in surplus. Fiscal space should be used to increase spending on education, high-speed broadband, and low-emission transport infrastructure, which would strengthen productivity growth and inclusiveness. Tax reductions for low-wage and second earners, along with higher environmental and real estate taxes, would promote greener and more inclusive growth. Strengthening lifelong learning would help workers cope with technological changes and prepare for the future of work.

Strong export growth came to a halt in 2018, on the back of uncertainties about trade policies. Moreover, new emission tests caused delays in car production. Business confidence and the appetite for investment, however, are

Photos: Freiburg im Breisgau, Germany (left); Munich, Germany (right)



still strong due to high capacity utilization and low credit costs. Immigration, rising household incomes, and low interest rates have boosted housing demand and construction. House prices have risen markedly, especially in urban areas where the supply of buildable land is scarce and inflexible.

Vigorous employment gains have pushed the unemployment rate to a record low, while the number of vacant jobs has continued to rise, in long-term care and construction. The strong labor market has resulted in a broad-based wage growth,

which supports private consumption. Job quality also has improved as the number of full-time permanent contracts has grown strongly. Headline inflation has picked up recently on the back of higher energy prices, but the core inflation rate remains modest. Fiscal policies should aim to improve productivity growth and inclusiveness. Fiscal policy is supporting the expansion. Child tax allowances and benefits are increasing along with pensions for mothers, while social contributions will be lower, in particular for low-paid jobs. The government plans to invest EUR37.9 billion per year from 2019 in infrastructure, education, housing, and digital technology. A fund of EUR2.4 billion was set up to expand high-speed broadband and support municipalities' investment in digital infrastructure in schools. Such discretionary tax cuts and spending increases will reduce the government budget balance in 2019 and 2020. Most of these fiscal measures are appropriate, as they promote long-run growth and inclusiveness.

Economic growth will decline due to slower growth of external demand and higher uncertainty. It will, however, remain solid, supported by strong private consumption and expansionary fiscal policy. Capacity constraints and labor shortages will constrain production, especially in the construction sector, increasing wage and price inflation. Strong domestic demand will continue to contribute to dynamic import growth and thereby narrow somewhat the large current account surplus. A further rise in protectionism would weigh on economic growth and employment, particularly if it involved slower growth

Germany's economic growth is projected to decline but remain solid, backed by strong job creation and a fiscal stimulus.

in China or tariffs on Germany's car exports. Renewed financial market turbulence and economic shocks in large European economies would also reduce exports. On the other hand, successful integration of immigrants into the labor market, improved education and training, and an increase in women's working hours because of recent reform efforts can alleviate labor shortages and allow companies to expand production.

German Travel Industry

According to German Travel Association's (DRV) annual survey, there were a total of 11,029 travel agencies in Germany in 2018, a slight decrease compared to 2017 (11,116). In 2018, the turnover of EUR36 billion (2017: 33.7 billion) generated by tour operators represents a market share of 52 percent while service providers rank second with a 35 percent market share (EUR23.8 billion), and product portals and others combine for the remaining 12 percent (EUR 8.1 billion). Online bookings generated a total turnover of EUR29.3 billion (43 percent) while offline bookings generated a total turnover of EUR38.86 billion (57 percent). While the online market is growing, offline and travel agencies continue to be important in the German market.

German Travel Behavior

According to the annual consumer survey "Reiseanalyse" conducted by FUR (Forschungsgemeinschaft für Urlaub und Reisen e.V.), tourism demand in Germany is booming. In 2018, 55 million people went on holiday, almost 1 million more than in the previous year. For the first time, the holiday travel propensity exceeded 78 percent. This indicator reflects the proportion of the population who went on at least one holiday of five days or more in 2018. The number of holiday trips was slightly above 70 million, and the total volume of expenditure was over EUR71 billion.

Germans are drawn to faraway destinations. In 2018, 73 percent of all holiday trips went abroad. This equates to more than 51 million trips, more than ever before. Long-haul trips were more popular than ever before, reaching 5.7 million trips and a market share of 8.1 percent (compared to 6.5 percent in 2010).



A 2019 study by Allianz Partners found that if time and money didn't matter, 11.6 percent of Germans would choose to spend their next vacation in the United States. This puts the U.S. comfortably in first place, followed by Germany (7.8 percent,) New Zealand (7.0 percent), Canada and Australia.

German Travel to North America

2018 visitation numbers from Germany were reported at 2.062 million visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office), a slight decrease compared to 2017 (2.08 million). This still represents the fourth best visitation all-time. Full 2019 data is not available yet.

Austria

Overall Economic Situation

Economic growth is projected to remain solid for Austria, but will slow in 2019 and 2020, according to the Organization for Economic Cooperation and Development (OECD). A deterioration in the external environment will dampen export and investment growth. Solid employment growth is fostering wage and private consumption growth. Inflation remains moderate. Robust economic growth, a low interest rate environment, and efforts to constrain government spending have helped to reduce public deficits.

A broad-based combination of internal and external drivers continues to support economic growth. Strong demand and capacity constraints on current production facilities are favoring the expansion of business investment, although skill shortages and regulatory barriers may hold back scope for productivity gains. Further reductions in the unemployment rate and high levels of job vacancies are contributing to wage growth and robust private consumption, although an inflow of foreign labor, rising participation rates of women and the elderly, and collective wage bargaining are helping to moderate the impact of the tightness of the labor market.

Sources: ADAC Reisemonitor; Allianz Partners; DRV (Deutscher Reiseverband); FUR (Forschungsgemeinschaft für Urlaub und Reisen e.V.); OECD (Organization for Economic Cooperation and Development); U.S. Department of Commerce, National Travel & Tourism Office

Following the broad-based upswing in 2018, economic growth is projected to revert toward the potential growth rate of around 2 percent in 2019 and 2020. This reflects capacity constraints holding back production and a weaker external environment. Private consumption will remain solid. Inflation is set to slow to 2 percent over the coming two years. Uncertainties surrounding global trade, the euro area, and Brexit could further dampen exports and investment. Private consumption could surprise on the upside if the current positive sentiment persists, and strong competitiveness could lead to higher-than-expected export growth.

Austrian Travel Industry & Travel Behavior

The Austrian market is very similar to the German market as five of the top seven Austrian tour operators are owned by German tour operators. Of the 10.2 million holiday trips booked by Austrian consumers in 2018, 63.8 percent led them abroad. In addition, Austrians continuously favor long-distance journeys, especially to the Americas, which are preferred to Asia and Africa (288,000 travelers compared to 265,000 and 200,000 respectively). Similar to their German neighbors, if Austrian travelers could choose a destination of their dream, regardless of cost and time involved, 11.2 percent would pick the United States, a 2018 Allianz Global Assistance survey found.

2018 visitation numbers to the USA from Austria were reported at 201,733 (2017: 198,713) visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office). Full 2019 data is not available yet.



Switzerland

Overall Economic Situation

The Switzerland GDP growth has been buoyant in recent quarters and is projected to be about 1.5 percent over the next two years, according to the Organization for Economic Cooperation and Development (OECD). Domestic demand will gain strength, supported by household consumption. However, the boost to exports from the earlier exchange rate depreciation and one-off events will fade. The large current account surplus will narrow slightly. Inflation will pick up gradually but remain moderate. Monetary policy rates are projected to start to increase in the second half of 2019 but to remain negative through 2020. The fiscal stance will become slightly expansionary as exceptional revenues unwind. Pension reform is urgent as population aging weighs on pension system funding. Reducing the cost of childcare and expanding its supply could encourage women's full participation in the economy.

The economy has expanded strongly, growing 3.2 percent year-over-year in the first half of 2018. The manufacturing sector has been the main engine of growth, but receipts from special international sports events to their Swiss-based federations also contributed to the exceptional outcome. Faster growth of export markets as well as exchange rate depreciation have boosted manufacturing exports. Gross fixed investment has been solid despite a recent slowdown. GDP growth is set to slow but remain above potential. Household consumption will gain momentum, supported by real wage gains and falling unemployment. Investment growth will slow but remain strong. Failure of the ongoing negotiations with the European Union to establish a consolidated institutional framework could hamper the close economic relationship Switzerland now enjoys. Rising global tensions could entail a

A total of 47 percent of Swiss travelers book at least one holiday a year in a stationary travel agency, particularly for long-haul travel.

further appreciation of the Swiss franc, dampening exports. Conversely, households' optimism may lead to a sharper decline in their saving ratio and higher consumption growth, narrowing the current account surplus.

Profile of Average Swiss Traveler to the USA

Swiss tourists to the USA typically like to travel individually or in small groups. It provides them with creative freedom, which is important for a mature market with some 75 percent of “repeat visitors.” Swiss travelers enjoy above-average purchasing power. On average, Swiss travelers spend \$4,840 while in the United States. The Swiss value punctuality and quality service at restaurants and hotels. Quality is a prime criterion before price. The language hurdle tends to be quite low.

Swiss Travel Industry & Travel Behavior

A study conducted by Allianz Global Assistance in 2018 found that the booking behavior of Swiss travelers remains very stable—online travel agencies retain their high market share of previous years with 71 percent of all bookings. However, 47 percent of Swiss travelers book at least one holiday a year in a stationary travel agency, particularly for long-haul travel, and they enjoy an above average purchasing power while traveling. The Maldives and Canary Islands are the most popular destinations during the winter months, while Spain, the United States, and Greece are the most popular summer destinations.

2018 visitation numbers to the USA from Switzerland were reported at 463,000 visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office), a 5 percent increase compared to 2017 (441,000). Full 2019 data is not available yet.

Brand USA Resources



Online Channels

Digital Marketing/Social Media

The majority of the USA Campaigns are driven by digital marketing strategies to engage, inspire, and prompt international travelers to visit the United States. A variety of channels and methods are used, including:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Rich media
- Targeted advertising

Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which includes a global site in English plus in-language sites 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.

Photos: Berlin, Germany (left); Grindelwald, Switzerland (right)

Social Media Channels

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

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

- **Website:** VisitTheUSA.com
- **Twitter:** @VisitTheUSA
- **Facebook:** Facebook.com/VisitTheUSA
- **YouTube:** YouTube.com/VisitTheUSA
- **Instagram:** VisitTheUSA

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

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

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in the Digital Channels chart on the following page.



Digital Channels

Market	URL	Local Tagline	Channels	Hashtag
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	@VisitTheUSA facebook.com/VisitTheUSAau YouTube.com/VisitTheUSA	#VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	@VisiteOsUSA facebook.com/VisiteOsUSA YouTube.com/VisiteOsUSA	#VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	@VisitTheUSAcA facebook.com/VisitTheUSAcA YouTube.com/VisitTheUSA	#VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSAcA facebook.com/VisitTheUSAcA YouTube.com/VisitTheUSAFr	#VisitTheUSA
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	@VisitTheUSAes facebook.com/VisitTheUSAcl YouTube.com/VisitTheUSAes	#VisitTheUSA
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	<p>Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn</p> <p>Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA</p> <p>Youku (YouTube equivalent): http://i.youku.com/gousacn</p> <p>Weishi (Vine equivalent): http://www.weishi.com/u/23484775</p> <p>Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局</p> <p>Lofter (Photo sharing platform): http://GoUSA.lofter.com</p>	#VisitTheUSA
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	@VisitTheUSAes facebook.com/VisitTheUSAco YouTube.com/VisitTheUSAes	#VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSAFr facebook.com/VisitTheUSAFr YouTube.com/VisitTheUSAFr	#VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	@VisitTheUSA facebook.com/VisitTheUSAde YouTube.com/VisitTheUSAde	#VisitTheUSA
Global	VisitTheUSA.com	Plan Your USA Trip Now	@VisitTheUSA facebook.com/VisitTheUSA YouTube.com/VisitTheUSA	#VisitTheUSA
India	GoUSA.in	Plan Your USA Trip Now	@GoUSAin facebook.com/GoUSAin YouTube.com/GoUSAin	#USATrip
Japan	GoUSA.jp	今すぐ USAへの 旅の 計画を	@GoUSAjp facebook.com/GoUSAjp YouTube.com/GoUSAjp	アメリカ旅行
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	@VisitTheUSAes facebook.com/VisitTheUSAmx YouTube.com/VisitTheUSAes	#VisitTheUSA
Korea	GoUSA.orkr	지금 USA 여행을 계획해보세요	@GoUSAkr facebook.com/GoUSAkr YouTube.com/GoUSAkr	#미국여행
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	@VisitTheUSA facebook.com/VisitTheUSAse YouTube.com/VisitTheUSA	#VisitTheUSA
Taiwan	GoUSA.tw	N/A	N/A	N/A
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	@VisitTheUSAuk facebook.com/VisitTheUSAuk YouTube.com/VisitTheUSA	#VisitTheUSA

GoUSATV Available on Roku, Apple TV, Amazon Fire, iOS, and Android. Also accessible via GoUSATV.com and YouTube.

Brand USA Traveler Research: Germany

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, 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 Five Motivations for Selecting Last Intercontinental Destination

*Question: What motivates your desire to visit that destination? Select all that apply (N=1030).
Base: Germany intercontinental travelers.*



36%

Dining/
gastronomy



34%

Cultural historic
attractions



34%

Ecotourism and
nature



32%

Urban attractions



31%

Shopping

Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1030). Base: Germany intercontinental travelers.

49%

Diverse

39%

Adventurous

29%

Energetic

28%

Forward-
thinking

26%

Friendly



Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: Germany intercontinental travelers (N=1030).



54%

Websites via computer



37%

Personal advice from family/friends



27%

Information in print travel guidebooks



21%

Personal advice from travel professionals/travel agents

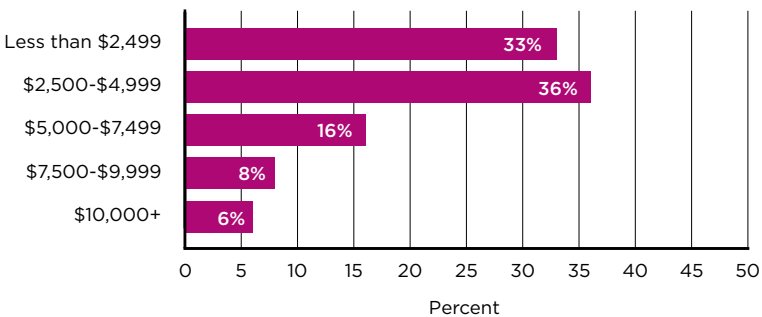


20%

Websites/applications via tablet

Expected Household Travel Spend for Next Intercontinental Trip

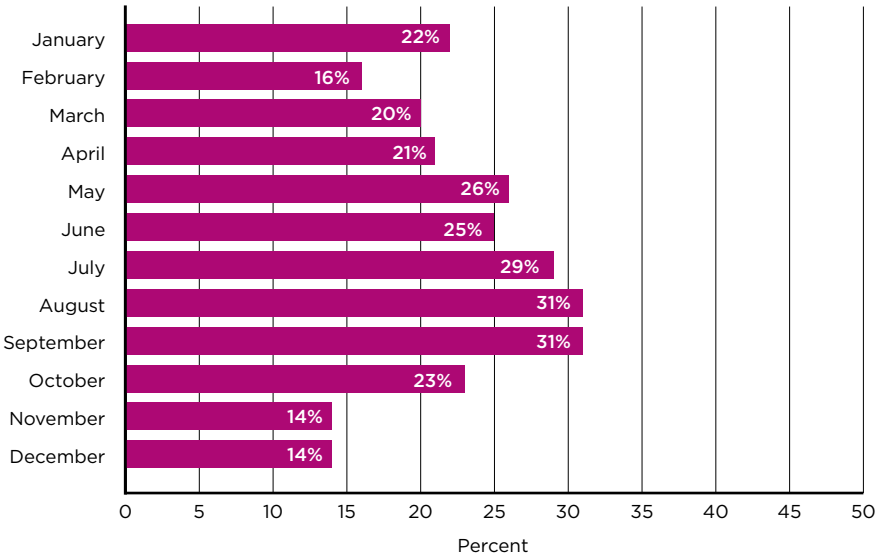
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: Germany intercontinental travelers (N=1030). Note: Totals may not add up to 100% due to rounding (Conversion EUR to USD= 1.162).



Mean: \$4,414 **Median:** \$3,486

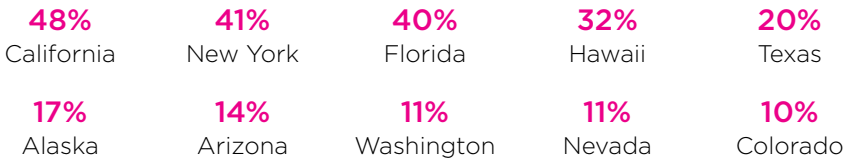
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Germany intercontinental travelers 2019 (N=1030).



Destination Interest—Top 10 States

Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: Germany intercontinental travelers with interest in visiting the United States (N=875).

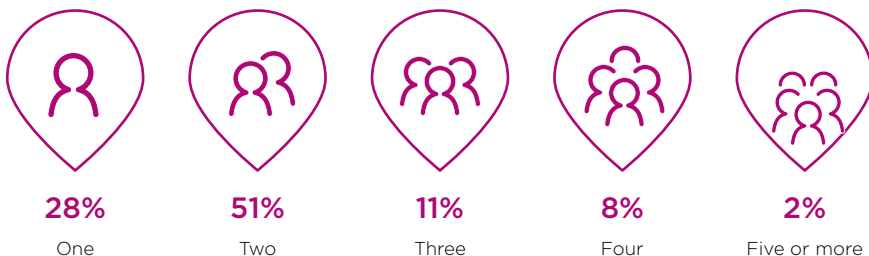


Source: Brand USA Market Intelligence Study 2018



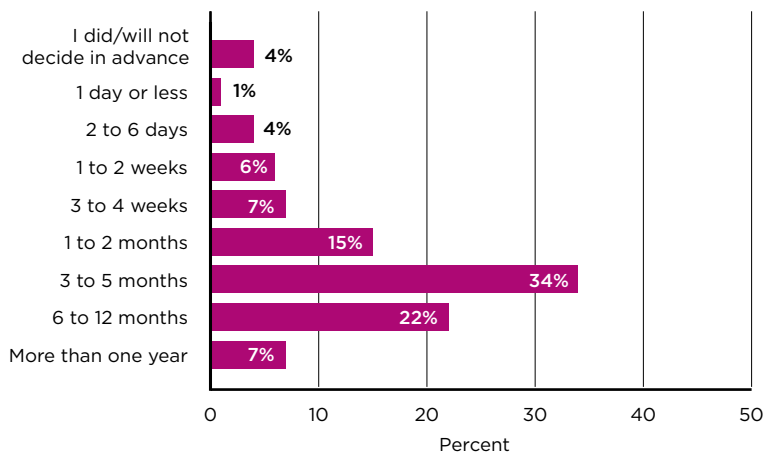
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Germany intercontinental travelers 2019 (N=1030). Note: Totals may not add up to 100% due to rounding.



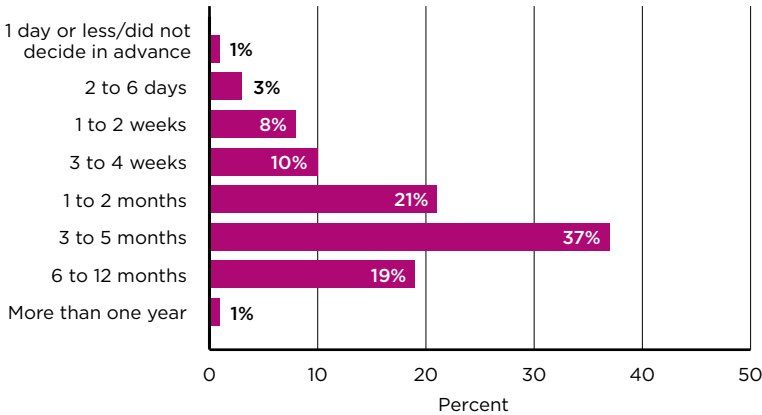
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Germany intercontinental travelers 2019 (N=1030). Note: Totals may not add up to 100% due to rounding.



Air Booking for Next International Trip

Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box. Base: Germany intercontinental travelers 2019 (N=1030). Note: Totals may not add up to 100% due to rounding.



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? Germany intercontinental travelers (N=1030). Note: Totals may not add up to 100% due to rounding.



33%

I would bring it up to recommend as a destination



24%

I would tell people positive things about it if it were brought up



30%

I would tell people neither positive nor negative things if it were brought up



7%

I would tell people negative things if it were brought up



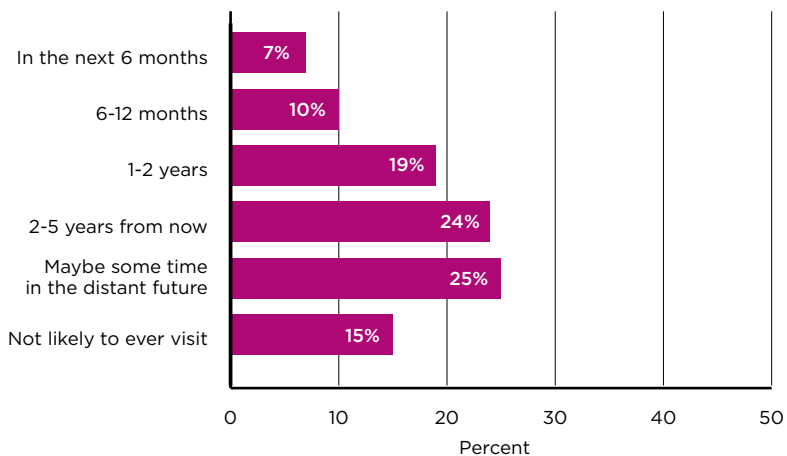
6%

I would bring it up to discourage people from traveling there



Likelihood of Travel to the USA

Question: *When, if ever, are you likely to visit the following countries?* Base: *Germany intercontinental travelers 2019 (N=1030).*



Highlights of Success

Over the past seven years, Brand USA's marketing efforts have generated...

7.5 million
incremental visitors



nearly
\$25 billion
incremental spending

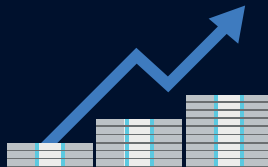


50,000+
incremental jobs
supported
each year

\$7.1 billion
federal, state &
local taxes



nearly
\$55 billion
total economic
impact





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.

Brand USA Partnerships



Visit USA Committees

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.

Visit USA Committee Germany

Hans L. Gesk
President

Tilo Krause-Dünow
Vice President

Cristian Meuter
General Manager

Visit USA Committee Austria

Werner O. Marschall
President

Peter Kratochwill
Vice President

USAHQ@Visit-USA.at

Visit USA Committee Switzerland

Heinz Zimmermann
Chairman

Reto Schneider
Vice Chairman

Admin@VUSA.ch

*Photos: Lake Maggiore, Switzerland (left); Basel, Switzerland (right)
Source: CIA World Factbook 2020, unless noted otherwise*



About the U.S. Department of Commerce

Brand USA works in close concert with the U.S. Department of Commerce through the National Travel and Tourism Office (NTTO) and the U.S. Commercial Service.



The National Travel and Tourism Office (NTTO)

NTTO is the liaison between Brand USA and the federal government. The office works with 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 agencies.

More broadly, NTTO creates a positive climate for growth in travel and tourism by reducing institutional barriers to tourism, administers joint marketing efforts, provides official travel and tourism statistics, and coordinates efforts across federal agencies through the Tourism Policy Council. The office works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth through:

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;
- Design and administration of export expansion activities;
- Development and management of tourism policy, strategy and advocacy;
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.

Contact

NTTO

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The U.S. Commercial Service



The U.S. Commercial Service (USCS) is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration (ITA). The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States. As America's largest service export, travel and tourism is a key sector for the USCS. The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers to attract international visitors and to grow international arrivals. This assistance can include: trade counseling, market research, vetting of potential partners, outreach to wholesale buyers, and support with international sales calls/trade shows/visits. Our specialists in Germany, Austria, and Switzerland can be reached at the contact details below.

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