



Market Information 2018

UNITED KINGDOM & IRELAND



Cover images: Chicago, Illinois and Ponce, Puerto Rico

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 the United Kingdom and Ireland, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

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About Brand USA

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked in close partnership with more than 800 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

According to studies by Oxford Economics, over the past five years Brand USA's marketing initiatives have helped welcome 5.4 million incremental visitors to the USA, benefiting the U.S. economy with \$38.4 billion in total economic impact, and supporting more than 51,000 incremental jobs each year.

Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

For industry or partner information about Brand USA, please visit TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at VisitTheUSA.com.

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A Message From Christopher L. Thompson

We at Brand USA — the public-private partnership established eight years ago to promote international tourism to the USA — look forward to working with you to generate business in the outbound-travel sectors of the United Kingdom and Ireland.

As you would expect, the United Kingdom and Ireland represent a significant international market for inbound tourism to the United States. A total of 4.57 million travelers from the U.K. came to the United States during 2016. Only Canada and Mexico provided more U.S. visitors. Those who came from the U.K. in 2016 spent \$16.1 billion during their U.S. trips. According to the National Travel and Tourism Office, nearly a quarter (24 percent) of all U.S. service exports to the United Kingdom relate to travel and tourism.



Brand USA's new giant-screen film, "America's Musical Journey" – since its release earlier this year – is a 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.

Another major initiative is our new travel-entertainment TV channel, GoUSA TV, which also 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 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, this storytelling is relevant, engaging and authentic.

The U.K. 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 Australia and New Zealand. They can discuss with you the best ways to inspire these “down-under” travelers to book their trips to the USA now.

In November, for instance, Brand USA and its participating partners will be at the World Travel Market in London. This three-day exhibition allows 50,000 travel-industry professionals and media representatives to meet with travel and tourism suppliers.

And, just weeks ago, Brand USA partnered with American Airlines and British Airways to present the sixth yearly MegaFam for travel agents from the UK and Ireland. The multi-destination familiarization tour enabled 100 agents to travel along one of seven simultaneous itineraries throughout the United States. All of the agents then assembled in Nashville, where they shared their experiences. Nashville, of course, was a key location during the production of “America’s Musical Journey.”

Together, we are marketing the USA!

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President & CEO

Brand USA

Brand USA

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Geography

Area

United Kingdom

243,610 km²

Ireland

70,273 km²

Source: CIA World Factbook 2018

Climate

United Kingdom

The United Kingdom has a temperate climate, moderated by prevailing southwest winds over the North Atlantic Current. More than half of the days through the year are overcast.

Ireland

Ireland has a temperate maritime climate with mild winters and cool summers. The days are also overcast half of the time.

Demographics

Population

United Kingdom

65,648,100

Ireland

5,011,102

Source: CIA World Factbook 2018

Major Urban Areas

United Kingdom

London (capital): 10.313 million

Manchester: 2.646 million

Birmingham: 2.515 million

Glasgow: 1.223 million

Southampton/Portsmouth: 882,000

Liverpool: 870,000 (2015)

Ireland

Dublin (capital): 1.169 million (2015)

Source: CIA World Factbook 2018

Population by Age

Age	USA	United Kingdom	Ireland
0-14 years	18.73%	17.53%	21.46%
15-24 years	13.27%	11.9%	11.84%
25-54 years	39.45%	40.55%	43.2%
55-64 years	12.91%	11.98%	10.42%
65 years and older	15.63%	18.04%	13.07%
Median age	37.9 years	40.5 years	36.4 years
Population growth rate (2017 est.)	0.8%	0.5%	1.2%

Source: CIA World Factbook 2018

Economy

United Kingdom

GDP: \$2.88 trillion (2017 est.)

GDP real growth rate: 1.7% (2017 est.)

GDP—per capita: \$43,600 (2017 est.)

Unemployment rate: 4.4% (2017 est.)

Inflation rate: 2.6% (2017 est.)

Ireland

GDP: \$344.8 billion (2017 est.)

GDP real growth rate: 4.1% (2017 est.)

GDP—per capita: \$72,600 (2017 est.)

Unemployment rate: 6.4% (2017 est.)

Inflation rate: -0.4% (2017 est.)

Source: CIA World Factbook 2018

Vacation Allocation and Public Holidays

England, Wales and Scotland

Almost all workers are legally entitled to five to six weeks of paid-holiday each year. An employer can include bank holidays as part of statutory annual leave.

2018		
1 January	Monday	New Year's Day (substitute day)
2 January	Tuesday	2 nd January (Scotland only) (substitute day)
30 March	Friday	Good Friday
2 April	Monday	Easter Monday (England and Wales only)
7 May	Monday	Early May bank holiday
28 May	Monday	Spring bank holiday
27 August	Monday	Summer bank holiday (England and Wales only)
30 November	Friday	St Andrew's Day (Scotland only)
25 December	Tuesday	Christmas Day
26 December	Wednesday	Boxing Day

Northern Ireland and Republic of Ireland

Nearly all workers are legally entitled to four weeks of paid-holiday yearly.

2018		
1 January	Monday	New Year's Day (substitute day)
17 March	Saturday	St. Patrick's Day
30 March	Friday	Good Friday
17 April	Monday	Easter Monday
7 May	Monday	May Day
4 June	Monday	June bank holiday
12 July	Thursday	Battle of Boyne (Orangemen's Day)
6 August	Monday	August bank holiday
29 October	Monday	October bank holiday
25 December	Tuesday	Christmas Day
26 December	Wednesday	St. Stephen's Day

Primary Travel Periods

- **February:** School break
- **April:** Easter
- **Summer Holidays:** Six weeks in July/August; school starts in early September
- **October:** School break
- **Winter Holidays/Christmas**

Public School Holidays

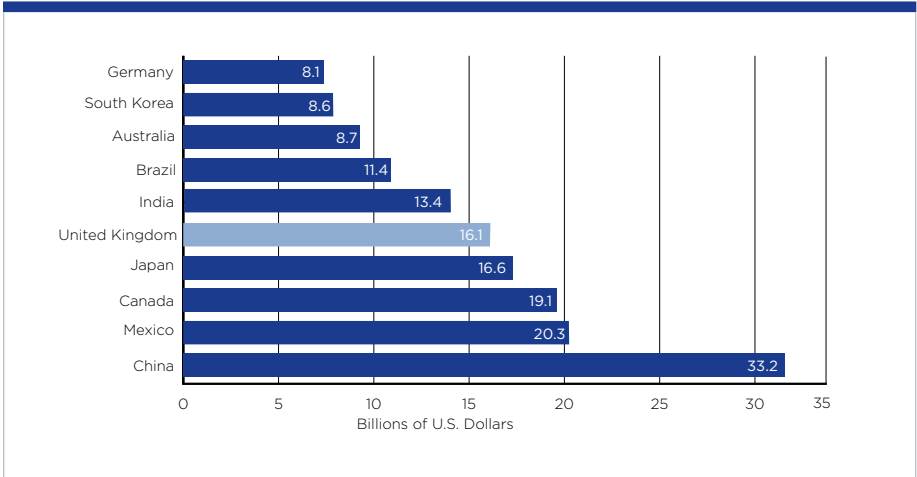
Schools are generally broken up in terms, having six terms per year:

- **Term 1:** Early September–late October
- **Term 2:** Early November–late December
- **Term 3:** Early January–mid February
- **Term 4:** Late February–late March/early April
- **Term 5:** Mid April–late May
- **Term 6:** Early June–late July

Students receive a few days off between each term. Families often plan travel during those times.

International Visitation Trends*

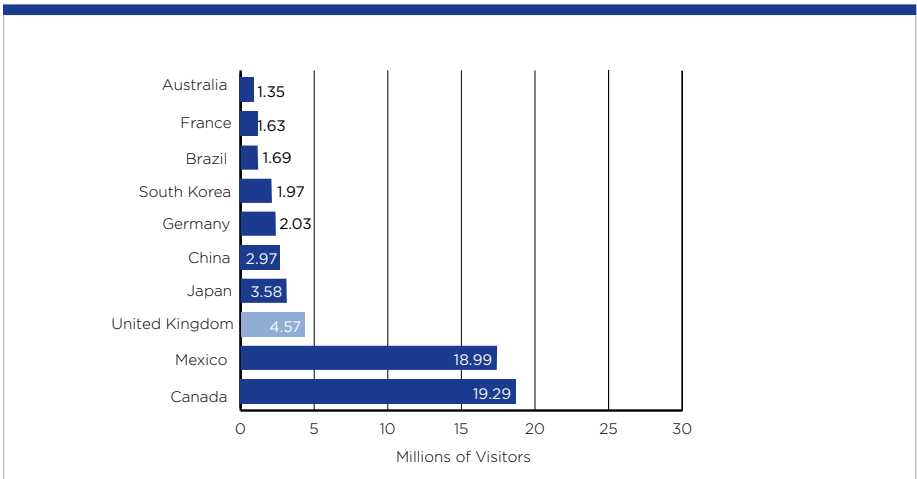
Visitor Spending



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)



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

Travel Trends*

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

Millions of US Dollars	2009	2010	2011	2012	2013	2014	2015	2016	Change 2016/2009
Total Travel & Tourism Exports	\$11,581	\$12,279	\$13,050	\$13,281	\$13,462	\$14,642	\$16,717	\$15,986	\$4,405
Travel Receipts	\$9,036	\$9,595	\$10,045	\$10,118	\$10,177	\$11,119	\$13,397	\$12,920	\$3,884
Other Business/ Personal Travel	\$8,591	\$9,118	\$9,539	\$9,596	\$9,568	\$10,355	\$12,205	n/a	n/a
Passenger Fare Receipts	\$2,545	\$2,684	\$3,005	\$3,163	\$3,285	\$3,523	\$3,320	\$3,066	\$521
Change (%) in Total Exports	-28	6	6	2	1	9	14	-4	38

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

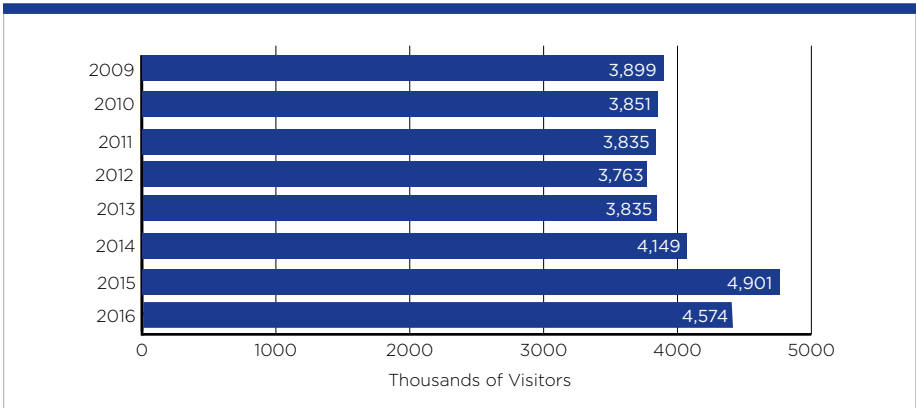
Spending Trends (exports)—Ireland (millions of U.S. dollars)

Millions of US Dollars	2009	2010	2011	2012	2013	2014	2015	2016	Change 2015/2008
Total Travel & Tourism Exports	\$1,457	\$1,275	\$1,359	\$1,363	\$1,464	\$1,634	\$1,841	n/a	n/a
Travel Receipts	\$1,179	\$1,031	\$1,096	\$1,111	\$1,307	\$1,420	\$1,516	n/a	n/a
Other Business/ Personal Travel	\$1,118	\$968	\$1,033	\$1,050	\$1,242	\$1,353	\$1,465	n/a	n/a
Passenger Air Transport	\$278	\$244	\$263	\$252	\$284	\$336	\$325	n/a	n/a
Change (%) in Total Exports	-35	-12	7	0	7	12	13	n/a	n/a

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

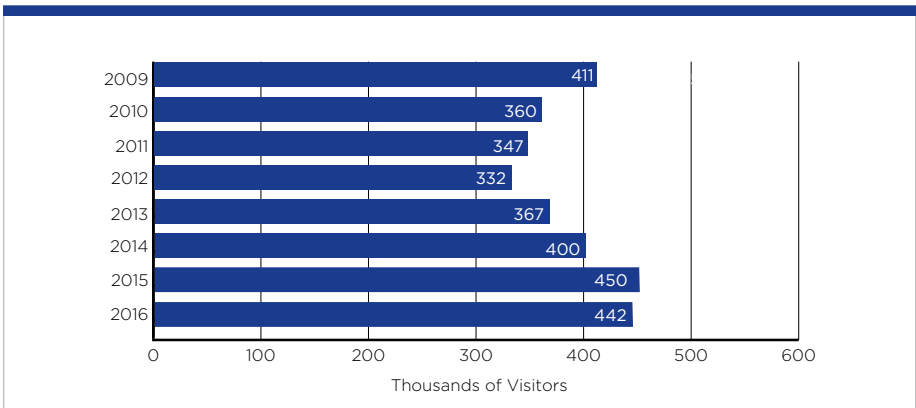
*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

Visitation Trends (arrivals)—United Kingdom



Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016)

Visitation Trends (arrivals)—Ireland



Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016)

*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	
	UK	Ireland	UK	Ireland	UK	Ireland
Vacation/Holiday	66	61	67	60	0.7	-1.2
Visit Friends/Relatives	19	21	18	23	-0.9	2.5
Business	9	12	9	12	0.2	0.1
Convention/Conference/Trade Show	5	3	4	4	-0.3	0.9
Education	1	3	1	0.8	0.2	-2.0
Health Treatment	0.2	0.1	0.2	0.1	0.0	0.1
Religion/Pilgrimages	0.1	0.1	0.0	0.2	-0.1	0.0
Other	0.2	0.4	0.1	0.3	-0.1	-0.1

Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016)

All Purposes of Trip

All Purposes of Trip	2015 (%)		2016 (%)		Point Change	
	UK	Ireland	UK	Ireland	UK	Ireland
Vacation/Holiday	75	67	75	70	0.2	3.3
Visit Friends/Relatives	28	34	27	37	-2.0	2.9
Business	12	14	11	13	0.1	-0.3
Convention/Conference/Trade Show	5	4	6	7	0.0	2.2
Education	2	3.8	3	1.2	0.1	-2.6
Health Treatment	0	0.3	0.4	0.2	0.1	-0.1
Religion/Pilgrimages	0	0.1	0.3	0.1	-0.1	0.0
Other	1	0.5	0.2	0.2	-0.2	-0.3
Net Purposes of Trip:						
Leisure & Visit Friends and Relatives	87	84	87	86	0.0	1.6
Business & Convention	15	17	16	18	0.3	1.1

Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016)

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

Select Traveler Characteristics—United Kingdom

Traveler Characteristics	2015		2016		Change	
	UK	Ireland	UK	Ireland	UK	Ireland
Length of Stay in U.S. (mean nights)	14.3	16.2	14.4	12.4	0.1	-3.8
Length of Stay in U.S. (median nights)	10	8	10	8	0.0	0.0
First International Trip to the U.S.	15	18	15	18	-0.2	-0.7

Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016)

Activity Participation While in the USA

Activities	2015 (%)		2016 (%)		Point Change	
	UK	Ireland	UK	Ireland	UK	Ireland
Shopping	88	87	86	87	-2.1	0.3
Sightseeing	82	80	83	84	0.7	3.6
Experience Fine Dining	36	37	34	40	-2.3	5.5
National Parks/Monuments	39	34	40	39	1.0	1.7
Small Towns/Countryside	31	33	30	30	-1.9	-3.1
Historical Locations	30	31	31	34	1.0	3.0
Amusement/Theme Parks	31	30	29	27	-2.1	-3.3
Guided Tours	29	33	32	30	2.3	-2.5
Art Gallery/Museum	28	27	29	31	1.0	4.0
Concert/Play/Musical	20	21	20	25	0.1	3.3
Snow Sports	2	1.6	1	0.2	-0.1	-1.4
Cultural/Ethnic Heritage Sites	15	15	15	11	-0.2	-3.6
Nightclubs/Dancing	14	22	14	21	0.4	-0.6
Sporting Event	14	17	14	15	0.0	-2.1
Camping/Hiking	5	6	5		-0.1	-1.9
Casino/Gambling	12	15	12		0.5	-2.5
Water Sports	7	13	7		0.0	-1.9
Golfing/Tennis	5	5	2		-1.1	-2.6
American Indian Communities	4	1.6	4		0.2	1.1
Hunting/Fishing	2	1.1	2		-0.5	1.5
Environ./Eco. Excursions	3	3	2		-0.7	-1.5
Other	2	1.4	2		0.1	-0.6

Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016)

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

USA Destinations Visited (States, Cities, and Regions)—United Kingdom

No destinations meet the minimum sample requirement for Ireland.

U.S. Destinations/Regions	Market Share 2015 (%)	Volume 2015 (000)	Market Share 2016 (%)	Volume 2016 (000)
Las Vegas	10.74	526	11.95	547
Los Angeles	**	**	9.26	424
San Francisco	**	**	7.88	360
Miami	5.89	289	7.44	340

Source: U.S. Department of Commerce, International Trade Administration; National Travel & Tourism Office, United Kingdom Market Profile (2016).

Transportation Used in the USA

Transportation Types	2015 (%)		2016 (%)		Point Change	
	UK	Ireland	UK	Ireland	UK	Ireland
City Subway/Tram/Bus	32	40	34	36	2.5	-3.7
Rented Auto	34	22	32	22	-2.3	0.0
Taxicab/Limousine	41	39	42	45	0.8	5.5
Auto Private or Company	30	35	29	30	-1.2	-5.1
Air Travel between Cities	25	25	24	21	-0.7	-3.1
Bus between Cities	12	19	11	17	-1.4	-1.6
Ferry/River Taxi/Short Scenic Cruise	13	11	13	12	0.4	0.4
Railroad between Cities	6	5	7	8	0.2	3.0
Rented Bicycle/Motorcycle Moped	3	3.6	3	2	0.0	-2.0
Cruise Ship/River Boat 1+ Nights	6	5	7	6	1.0	1.0
Motor Home/Camper	1	0.3	1	0.8	0.0	0.5

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

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

Air Travel Information

Non-stop Flights from United Kingdom/Ireland to USA Destinations

Airline name	Flights to	Code	Flights from	Code
Aer Lingus	Boston	BOS	Dublin	DUB
Aer Lingus	Boston	BOS	Shannon	SNN
Aer Lingus	Chicago O'Hare	ORD	Dublin	DUB
Aer Lingus	Hartford, CT	BDL	Dublin	DUB
Aer Lingus	Los Angeles	LAX	Dublin	DUB
Aer Lingus	Miami	MIA	Dublin	DUB
Aer Lingus	New York (JFK)	JFK	Dublin	DUB
Aer Lingus	New York (JFK)	JFK	Shannon	SNN
Aer Lingus	Newark	EWR	Dublin	DUB
Aer Lingus	Orlando International	MCO	Dublin	DUB
Aer Lingus	San Francisco	SFO	Dublin	DUB
Aer Lingus	Seattle	SEA	Dublin	DUB
Aer Lingus	Philadelphia	PHL	Dublin	DUB
Aer Lingus	Washington, D.C (Dulles)	IAD	Dublin	DUB
Air France	New York (JFK)	JFK	Birmingham	BHX
Air France	New York (JFK)	JFK	London Heathrow	LHR
Air India	Newark	EWR	London Heathrow	LHR
Air New Zealand	Los Angeles	LAX	London Heathrow	LHR
American Airlines	Chicago O'Hare	ORD	Dublin	DUB
American Airlines	Chicago O'Hare	ORD	London Heathrow	LHR
American Airlines	Chicago O'Hare	ORD	Manchester	MAN
American Airlines	Charlotte	CLT	London Heathrow	LHR
American Airlines	Charlotte	CLT	Dublin	DUB
American Airlines	Dallas/Fort Worth	DFW	London Heathrow	LHR
American Airlines	Los Angeles	LAX	London Heathrow	LHR
American Airlines	Miami	MIA	London Heathrow	LHR
American Airlines	New York (JFK)	JFK	Dublin	DUB
American Airlines	New York (JFK)	JFK	London Heathrow	LHR
American Airlines	New York (JFK)	JFK	Manchester	MAN
American Airlines	New York (JFK)	JFK	Birmingham	BHX
American Airlines	New York (JFK)	JFK	Edinburgh	EDI
American Airlines	Philadelphia	PHL	London Heathrow	LHR
American Airlines	Philadelphia	PHL	Glasgow	GLA
American Airlines	Philadelphia	PHL	Dublin	DUB

Airline name	Flights to	Code	Flights from	Code
American Airlines	Philadelphia	PHL	Shannon	SNN
American Airlines	Philadelphia	PHL	Manchester	MAN
Austrian Airlines	New York (JFK)	JFK	London Heathrow	LHR
Austrian Airlines	New York Newark	EWR	London Heathrow	LHR
British Airways	Atlanta	ATL	London Heathrow	LHR
British Airways	Austin	AUS	London Heathrow	LHR
British Airways	Baltimore	BWI	London Heathrow	LHR
British Airways	Boston	BOS	London Heathrow	LHR
British Airways	Chicago O'Hare	ORD	London Heathrow	LHR
British Airways	Chicago O'Hare	ORD	Manchester	MAN
British Airways	Dallas/Fort Worth	DFW	London Heathrow	LHR
British Airways	Denver	DEN	London Heathrow	LHR
British Airways	Fort Lauderdale	FLL	London Gatwick	LGW
British Airways	Houston	IAH	London Heathrow	LHR
British Airways	Las Vegas	LAS	London Heathrow	LHR
British Airways	Los Angeles	LAX	London Heathrow	LHR
British Airways	Miami	MIA	London Heathrow	LHR
British Airways	New York (JFK)	JFK	London City	LCY
British Airways	New York (JFK)	JFK	London Gatwick	LGW
British Airways	New York (JFK)	JFK	London Heathrow	LHR
British Airways	New York Newark	EWR	London Heathrow	LHR
British Airways	New Orleans International	MSY	London Heathrow	LHR
British Airways	Orlando International	MCO	London Gatwick	LGW
British Airways	Oakland	OAK	London Gatwick	LGW
British Airways	Philadelphia	PHL	London Heathrow	LHR
British Airways	Phoenix	PHX	London Heathrow	LHR
British Airways	San Diego	SAN	London Heathrow	LHR
British Airways	San Francisco	SFO	London Heathrow	LHR
British Airways	San Jose	SJC	London Heathrow	LHR
British Airways	Seattle	SEA	London Heathrow	LHR
British Airways	Tampa	TPA	London Gatwick	LGW
British Airways	Washington, D.C (Dulles)	IAD	London Heathrow	LHR
British Airways	Nashville, TN	BNA	London Heathrow	LHR
Delta	Atlanta	ATL	Dublin	DUB
Delta	Atlanta	ATL	London Heathrow	LHR
Delta	Atlanta	ATL	Manchester	MAN
Delta	Boston	BOS	Dublin	DUB
Delta	Boston	BOS	London Heathrow	LHR
Delta	Dallas/Fort Worth	DFW	London Heathrow	LHR

Airline name	Flights to	Code	Flights from	Code
Delta	Detroit	DTW	London Heathrow	LHR
Delta	Las Vegas	LAS	London Gatwick	LGW
Delta	Minneapolis	MSP	London Heathrow	LHR
Delta	New York (JFK)	JFK	Dublin	DUB
Delta	New York (JFK)	JFK	Edinburgh	EDI
Delta	New York (JFK)	JFK	Glasgow	GLA
Delta	New York (JFK)	JFK	London Heathrow	LHR
Delta	New York (JFK)	JFK	Manchester	MAN
Delta	New York (JFK)	JFK	Shannon	SNN
Delta	New York Newark	EWR	Dublin	DUB
Delta	Orlando International	MCO	London Gatwick	LGW
Delta	Orlando International	MCO	Manchester	MAN
Delta	Philadelphia	PHL	London Heathrow	LHR
Delta	Portland International	PDX	London Heathrow	LHR
Delta	Seattle	SEA	London Heathrow	LHR
Delta	Salt Lake City	SLC	London Heathrow	LHR
Delta	New York (JFK)	JFK	Dublin	DUB
Ethiopian Air	Los Angeles	LAX	Dublin	DUB
Finnair	New York (JFK)	JFK	London Gatwick	LGW
Finnair	New York (JFK)	JFK	London Heathrow	LHR
Iberia	New York (JFK)	JFK	London Gatwick	LGW
Iberia	New York (JFK)	JFK	London Heathrow	LHR
Jet2	New York Newark	EWR	East Midlands	EMA
Jet2	New York Newark	EWR	Glasgow	GLA
Jet2	New York Newark	EWR	Leeds/Bradford	LBA
Jet2	New York Newark	EWR	Manchester	MAN
Jet2	New York Newark	EWR	Newcastle	NCL
KLM	New York (JFK)	JFK	London Heathrow	LHR
Lufthansa	New York Newark	EWR	Edinburgh	EDI
Lufthansa	New York Newark	EWR	London Heathrow	LHR
Norwegian Air	Boston	BOS	Belfast	BFS
Norwegian Air	Boston	BOS	Cork	ORK
Norwegian Air	Boston	BOS	Dublin	DUB
Norwegian Air	Boston	BOS	Edinburgh	EDI
Norwegian Air	Boston	BOS	London Gatwick	LGW
Norwegian Air	Boston	BOS	Shannon	SNN
Norwegian Air	Denver	DEN	London Gatwick	LGW
Norwegian Air	Fort Lauderdale	FLL	London Gatwick	LGW
Norwegian Air	New York (JFK)	JFK	London Gatwick	LGW

Airline name	Flights to	Code	Flights from	Code
Norwegian Air	New York Stewart International	SWF	Belfast	BFS
Norwegian Air	New York Stewart International	SWF	Dublin	DUB
Norwegian Air	New York Stewart International	SWF	Edinburgh	EDI
Norwegian Air	New York Stewart International	SWF	Shannon	SNN
Norwegian Air	Las Vegas	LAS	London Gatwick	LGW
Norwegian Air	Los Angeles	LAX	London Gatwick	LGW
Norwegian Air	Oakland	OAK	London Gatwick	LGW
Norwegian Air	Orlando International	MCO	London Gatwick	LGW
Norwegian Air	Puerto Rico	SJU	London Gatwick	LGW
Norwegian Air	Seattle	SEA	London Gatwick	LGW
Primera Air	Newark, New Jersey	EWR	London Stansted	STN
Primera Air	Newark, New Jersey	EWR	Birmingham	BHX
Primera Air	Boston	BOS	London Stansted	STN
Primera Air	Washington, D.C (Dulles)	IAD	London Stanstead	STN
Singapore Airlines	Houston George Bush	IAH	Manchester	MAN
Thomas Cook Airlines	Boston	BOS	Manchester	MAN
Thomas Cook Airlines	Las Vegas	LAS	Belfast	BFS
Thomas Cook Airlines	Las Vegas	LAS	Glasgow	GLA
Thomas Cook Airlines	Las Vegas	LAS	Manchester	MAN
Thomas Cook Airlines	Las Vegas	LAS	London Stansted	STN
Thomas Cook Airlines	Los Angeles	LAX	Manchester	MAN
Thomas Cook Airlines	Miami	Mia	Manchester	MAN
Thomas Cook Airlines	New York (JFK)	JFK	Manchester	MAN
Thomas Cook Airlines	Orlando International	MCO	Cardiff	CWL
Thomas Cook Airlines	Orlando International	MCO	Glasgow	GLA
Thomas Cook Airlines	Orlando International	MCO	Belfast	BFS
Thomas Cook Airlines	Orlando International	MCO	London Gatwick	LGW
Thomas Cook Airlines	Orlando International	MCO	London Stansted	STN
Thomas Cook Airlines	Orlando International	MCO	Manchester	MAN
Thomas Cook Airlines	San Francisco	SFO	Manchester	MAN
Thomson	Orlando Sanford	SFB	Birmingham	BHX
Thomson	Orlando Sanford	SFB	East Midlands	EMA
Thomson	Orlando Sanford	SFB	Glasgow	GLA
Thomson	Orlando Sanford	SFB	Newcastle	NCL
Thomson	Orlando Sanford	SFB	Bristol	BRS
Thomson	Orlando Sanford	SFB	Edinburgh	EDI
Thomson	Orlando Sanford	SFB	London Gatwick	LGW

Airline name	Flights to	Code	Flights from	Code
Thomson	Orlando Sanford	SFB	London Stansted	STN
Thomson	Orlando Sanford	SFB	Manchester	MAN
United	Chicago O'Hare	ORD	Edinburgh	EDI
United	Chicago O'Hare	ORD	London Heathrow	LHR
United	Chicago O'Hare	ORD	Shannon	SNN
United	Chicago O'Hare	ORD	Dublin	DUB
United	Houston	IAH	London Heathrow	LHR
United	Los Angeles	LAX	London Heathrow	LHR
United	New York Newark	EWR	Birmingham	BHX
United	New York Newark	EWR	Dublin	DUB
United	New York Newark	EWR	Edinburgh	EDI
United	New York Newark	EWR	Glasgow	GLA
United	New York Newark	EWR	London Heathrow	LHR
United	New York Newark	EWR	Shannon	SNN
United	San Francisco	SFO	London Heathrow	LHR
United	Washington, D.C (Dulles)	IAD	Dublin	DUB
United	Washington, D.C (Dulles)	IAD	London Heathrow	LHR
United	Washington, D.C (Dulles)	IAD	Manchester	MAN
United	New York Newark	EWR	Manchester	MAN
Virgin Atlantic	Atlanta	ATL	London Heathrow	LHR
Virgin Atlantic	Atlanta	ATL	Manchester	MAN
Virgin Atlantic	Detroit	DTW	London Heathrow	LHR
Virgin Atlantic	Washington, D.C (Dulles)	IAD	London Heathrow	LHR
Virgin Atlantic	Boston	BOS	London Heathrow	LHR
Virgin Atlantic	Boston	BOS	Manchester	MAN
Virgin Atlantic	Chicago O'Hare	ORD	London Heathrow	LHR
Virgin Atlantic	Las Vegas	LAS	London Gatwick	LGW
Virgin Atlantic	Las Vegas	LAS	Manchester	MAN
Virgin Atlantic	Los Angeles	LAX	London Heathrow	LHR
Virgin Atlantic	Miami	MIA	London Heathrow	LHR
Virgin Atlantic	New York (JFK)	JFK	London Heathrow	LHR
Virgin Atlantic	New York (JFK)	JFK	Manchester	MAN
Virgin Atlantic	New York Newark	EWR	London Heathrow	LHR
Virgin Atlantic	Orlando International	MCO	Belfast	BFS
Virgin Atlantic	Orlando International	MCO	Glasgow	GLA
Virgin Atlantic	Orlando International	MCO	London Gatwick	LGW
Virgin Atlantic	Orlando International	MCO	Manchester	MAN
Virgin Atlantic	San Francisco	SFO	London Heathrow	LHR
Virgin Atlantic	San Francisco	SFO	Manchester	MAN

Airline name	Flights to	Code	Flights from	Code
Virgin Atlantic	Seattle	SEA	London Heathrow	LHR
Wow Air*	Detroit	DTW	Reykjavik	KEF
Wow Air*	Cleveland	CLE	Reykjavik	KEF
Wow Air*	Cincinnati	CVG	Reykjavik	KEF
Wow Air*	St Louis	STL	Reykjavik	KEF

Note: Icelandair serves a number of U.S. destinations via Reykjavik, including Boston, Chicago, Denver, Anchorage, Minneapolis, New York, Orlando, Portland, Seattle and Washington, D.C.

WOW air also serves Boston, Los Angeles, Miami, New York, San Francisco and Washington, D.C. via Reykjavik.

*Flights from Stansted, Gatwick, Bristol and Edinburgh to Reykjavik

Travel Markets

The United Kingdom and Ireland represent the largest overseas market for international arrivals to the United States.

Despite this, the United Kingdom and the United States are entering a period of uncertainty – a consequence of Brexit, the new U.S. administration, global terrorism and fluctuating currencies. As a result, there may be a reduction in spend and length of stay during their trips to the United States. However, it has not resulted in any significant downturn in U.S. visitation. Challenges have been offset by deeply rooted cultural, business and familial ties between the citizens of the United Kingdom and Ireland, and their fellow citizens in the United States.

Though United Kingdom travelers will have to accept price increases on all foreign travel in the short- to medium-terms, the outbound-travel market has firm standing. Annual holidays are nearly sacrosanct. Even during the aftermath of the 2008 global financial crisis, investments in leisure travel exceeded other discretionary spending, including expenditures for automotive maintenance and home repairs.

The most popular motivation for United Kingdom residents to travel abroad, in 2015, was to go on holidays. Such trips accounted for 68 percent of the travel by those who live in England, excluding London. For Londoners, 48 percent of travel abroad was connected to holiday travel. And, holiday travel also accounted for 71 percent of the trips abroad by residents of Scotland, and 75 percent of those trips by residents of Wales.

Residents of England, beyond London, were also more likely than Londoners to book inclusive tours, 40 percent compared to 23 percent. The Londoners, however, were more apt to travel for business – 16 percent of their trips abroad, 2.3 million, were for this reason. Those business trips accounted for 23 percent of the spending abroad (£2 billion) by Londoners.

Additionally, Londoners were more likely than other United Kingdom residents to go to countries beyond Europe or North America when they went abroad – 19 percent compared to a range of 11 to 14 percent.

United Kingdom consumers continue to show their reluctance to forgo overseas holidays. A July 2016 Mintel study revealed that even right after the Brexit vote last June, intentions for holiday bookings did not drop off.

Overall, United Kingdom residents made 65.7 million visits abroad during 2015, according to the UK's Office for National Statistics. This was a jump of 9.4 percent over 2014. The United Kingdom travellers also spent 9.8 percent more (£3.5 billion) in 2015, compared to 2014 (without any inflation adjustment). And, they stayed 10.7 percent more nights abroad - more than 682 million nights.

The total number of holiday trips abroad increased by 9.4 percent, from 2014 to 2015. Visits to friends or family, and visits for business, were up 11 percent and 5.8 percent, respectively. Spending also was up - 7.6 percent on holiday visits, nearly 3 percent on visits to friends or family, and a substantial 30 percent on business trips.

Visits to North America, Europe and "other countries" expanded in 2015 from the year before - up 6.4 percent, 10 percent and 7.3 percent, respectively.

Spending by the UK travelers on these trips also increased: 14.9 percent in North America, 12.4 percent in Europe and 1.9 percent in "other countries."

For United Kingdom travelers, the United States is the most visited destination among all long-haul trips. It is also the third-most popular destination among countries where a trip exceeds four nights.

During the past five years, airlines have increased direct seats by 27 percent and are launching new direct flights from the United Kingdom to the United States. These carriers are flying into established U.S. gateway cities, in addition to a second tier of U.S. cities. These new routes are opening up more of the United States to United Kingdom travellers. As Brand USA's "proximity campaign" suggests, international visitors have access to an array of U.S. travel experiences and attractions, all within a reasonable radius of their original destination. And, with low-cost, trans-Atlantic flights driving fares down, an expanding number of United Kingdom travellers can opt to visit the United States.

Tour operators in the United Kingdom and Ireland have noted that the demand for multi-centre bookings - combining two or more destinations into a single package has doubled in recent years. More travellers want to see more of what a country or region has to offer.

The United Kingdom is a well-established source market for inbound U.S. visitation. United Kingdom travellers, however, have shown a shift in their

inclination to become more adventurous. They are opting for trips to alternative U.S. locations, some “off the beaten path.” Travel to such places as Texas, the Deep South and the Pacific Northwest has increased.

Market Snapshot

The United Kingdom economy showed resilience in 2016, confounding forecasts of a painful recession after last June’s Brexit vote. GDP grew by 1.8 percent despite a drop in the sterling by 12 percent from the two-year median.

Overall confidence in the economy is now at pre-2008 levels. Even uncertainty about Brexit negotiations, the outlook for 2017 is positive. House prices are continuing to rise and wage inflation is at a 10-year high. The unemployment rate has rapidly contracted, and is now at 4.9 percent. The United Kingdom stock market has jumped 37 percent over nine months, following post Brexit levels and is continuing to trade at an all-time high.

The political situation in the United Kingdom has changed dramatically over the past three years. In 2014, Prime Minister David Cameron’s coalition government was atop a divided political landscape. Now, Teresa May, who became prime minister in July 2016, leads a Conservative-majority government.

The political right-wing owes much of its strength to the weakness of the left-wing opposition, which for the past 18 months has consistently trailed in the polls by 15 to 20 percent. The lack of opposition has allowed the Conservative government to pursue its policies without resistance.

It has led to continued savings in welfare and cost-cutting in the state departments, while maintaining a resistance to any tax increases on middle-income earners. The focus for this government is to balance the deficit and bring the country into a surplus by 2022.

The outlook in the United Kingdom is of cautious optimism despite the uncertainty of the European and global economic situations.

The United Kingdom is the largest, overseas source market for in-bound U.S. visitation. About 4.9 million United Kingdom visitors came to the United States during 2015 – an 18-percent hike over the previous year. Annual visitor spending by visitors from the United Kingdom, however, has decreased nearly \$4 billion a year. The \$12.6 billion they spent in 2015 is a five-year low.

Despite major declines fueled by the global financial crisis in 2009 and three years later, United Kingdom visitors are again crossing the Atlantic in record numbers. Visitation increased 2 percent and 4 percent in 2013 and 2014 respectively, finally increasing by 18 percent in 2015. Never before has the United States counted as many travellers from the United Kingdom as they did in 2015, finally eclipsing the previous record set back in 2000.

The number of U.S. visitors from Ireland increased 13.9 percent in 2015, after it had risen 8 percent in 2014.

The Office for National Statistics (ONS) provides a useful demographic breakdown of United Kingdom leisure visitors to the USA:

AGE	VISITORS
0-15	151,000
16-24	286,000
25-34	756,000
35 -44	776,000
45-54	779,000
55-64	432,000
65+	313,000

- Under-25 travelers are most likely to book air travel and accommodations separately, or separately from the same provider, in order to attain the lowest-priced airfare.
- Travelers, ages 25 to 34, are most likely to research travel plans using a mobile device. A quarter of them use their devices to actually book holidays.
- Travelers, ages 18 to 34, are the most frequent holiday-takers, especially long ‘bucket-list’ holidays.
- Over a quarter (28 percent) of travelers, 35 to 44, are booking their holidays through high street travel agents, suggesting that those booking family holidays welcome the benefits of face-to-face contact.
- Travelers over 55 are more likely to book their holidays as packages. They prefer to make their plans and get the best prices available by phoning travel agents whom they trust,

Expanded use of digital channels for researching and booking travel plans

- as demonstrated by under-35 consumers - has had an impact on traditional travel agents. The number of shop-based travel agents has dropped significantly, and according to the market-research firm Mintel Reports, in-store bookings declined by 4.5 percent in 2014.

Many agents have set targets for improving their online bookings. Some brands, however, like Flight Centre and Virgin Holidays, continue to see the value of in-store sales. Consumer trust in brand names allows well-established brands to flourish. Meanwhile, independent agents along High Street will have to work harder and look to digital channels to expand their level of bookings.

Source: National Travel & Tourism Office (May 2015)

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; and
- 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. In the UK and Ireland the URL is VisitTheUSA.co.uk.
- 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/TasteUSA)
- Road Trips: [#RoadTripUSA](https://twitter.com/RoadTripUSA)
- Great Outdoors: [#OutdoorsUSA](https://twitter.com/OutdoorsUSA)
- Market the Welcome: [#USAWelcome](https://twitter.com/USAWelcome)

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

CHART 1

Digital Channels

MARKET	URL	Local Tagline	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Des 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 Des 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.or.kr	지금 USA 여행을 계획해보세요	facebook.com/GoUSAkr	@GoUSAkr	#미국여행	VisitTheUSA	YouTube.com/GoUSAkr
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUSAse	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Taiwan	GoUSA.tw	立即訂製專屬你的美國之旅	facebook.com/GoUSAofficial	@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

Motivation	% Selected
Cultural/Historical Attractions	50
Local Lifestyle	47
Beaches/Seaside Attractions	45
Dining/Gastronomy	32
Shopping	32

Top 5 Strongest Impressions of the USA

Impression	% Selected
Friendly	41
Energetic	40
Adventurous	38
Diverse	35
Open-minded	22

Question: What motivates your desire to visit that destination? Select all that apply (N=1059. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1018).

Source: Brand USA Market Intelligence Study 2017.

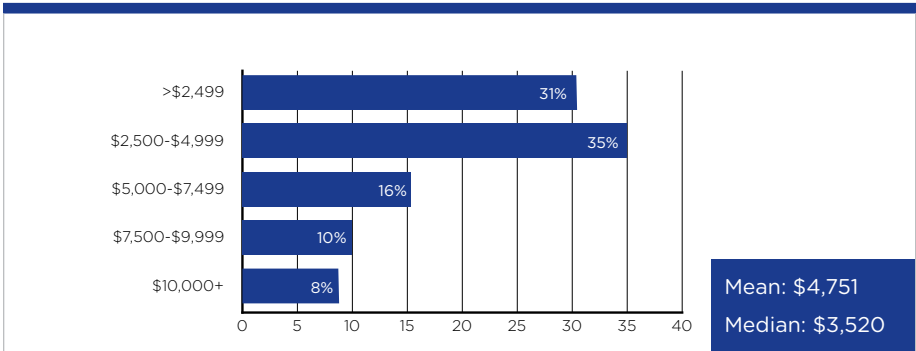
Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

Channels	% Selected
Websites via Computer or Laptop	59
Personal Recommendations from Family and Friends	33
Websites of Applications via Tablet	23
Information in Printed Travel Guidebooks	22
Printed Publications, Articles or Brochures	20

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: UK International travelers (N=1018).

Source: Brand USA Market Intelligence Study 2017

Expected Household Travel Spend for Next Intercontinental Trip

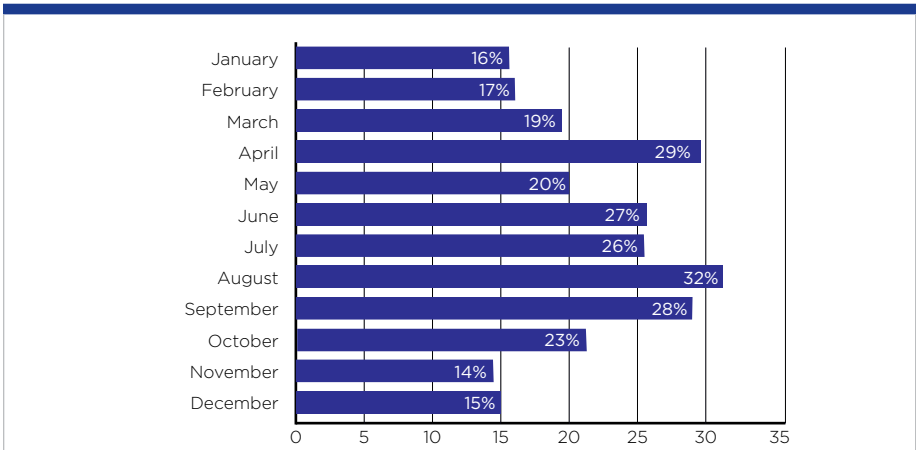


Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/lodging/ additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.

Base: UK intercontinental travelers 2017 (N=1059).

Source: Brand USA Market Intelligence Study 2016 (Conversion GBP to USD= 1.57)

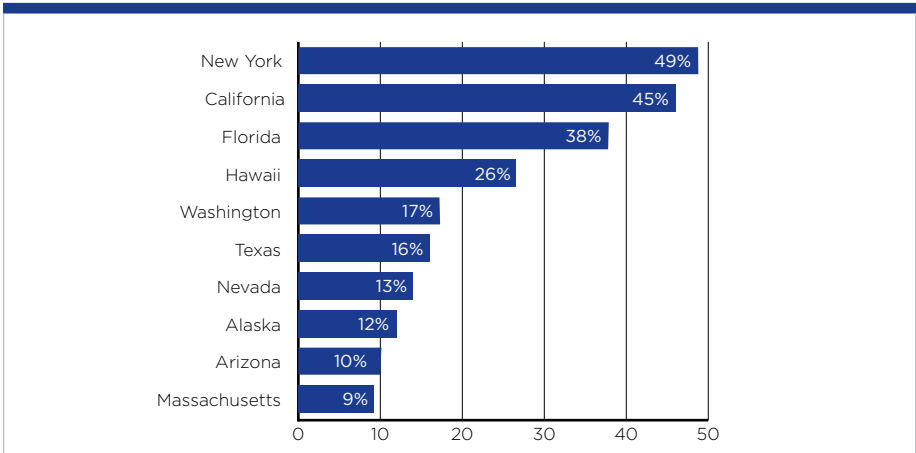
Months Traveled (April 2015–April 2017)



Question: During what month(s) did you take your holiday(s)? Base: UK intercontinental travelers (N=1018).

Source: Brand USA Market Intelligence Study 2017.

Destination Interest—Top 10 States

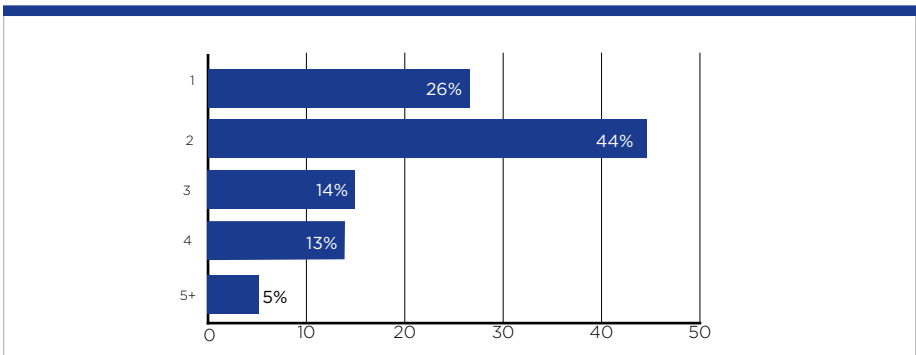


Question: You indicated in a previous question that you have interest in visiting the U.S. some time in the future. Which U.S. state(s) are you interested in visiting?

Base: UK international travelers who are interested in visiting the U.S. (N=1018).

Source: Brand USA Market Intelligence Study 2017.

Expected Travel Party Size of Next Intercontinental Trip

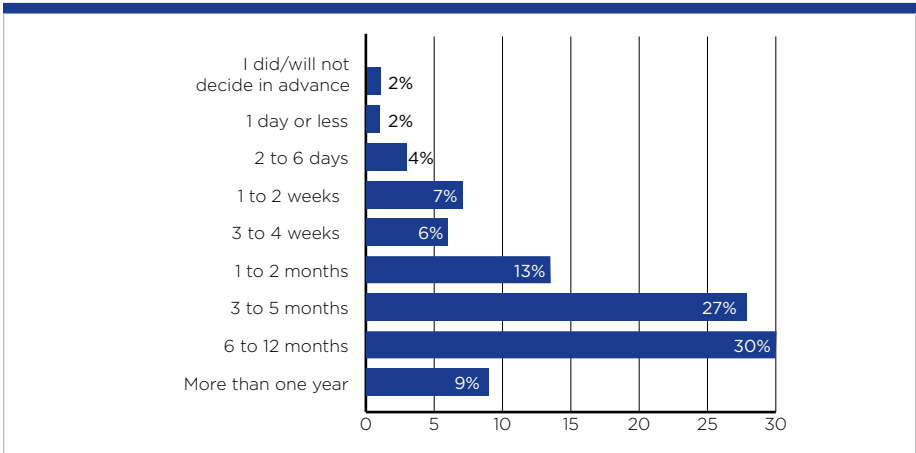


Question: How many people in your household will travel with you this holiday? Select all that apply.

Base: UK intercontinental travelers 2016 (N=1018).

Source: Brand USA Market Intelligence Study 2017.

Destination Decision for Next International Trip

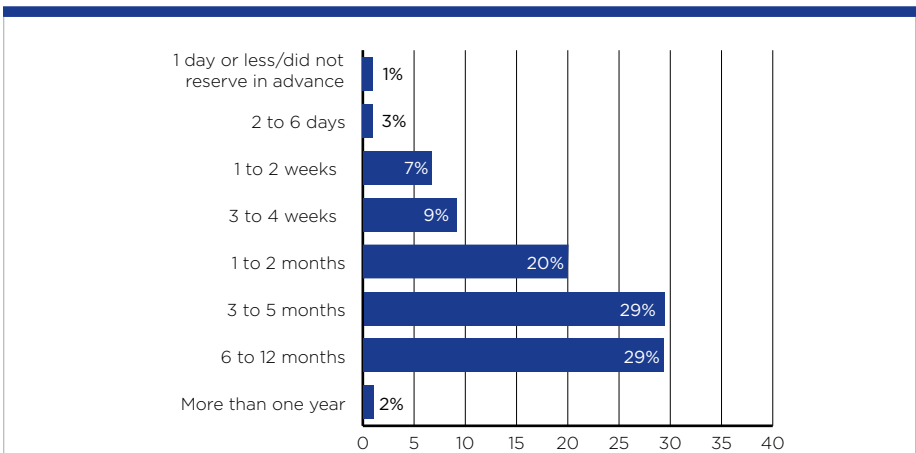


Question: How far in advance of your departure date did/will you decide on the destination? Please select one answer for each of the following questions.

Base: UK intercontinental travelers (N=1018). Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

Air Booking for Next International Trip

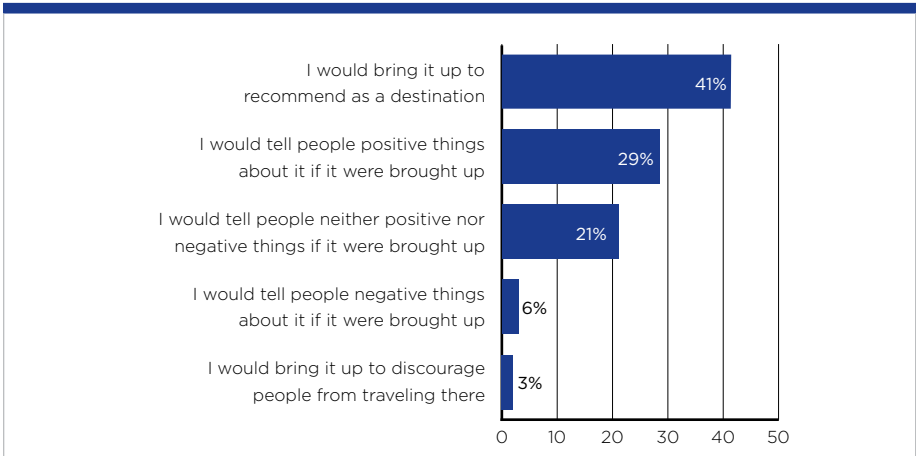


Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box.

Base: UK intercontinental travelers who booked/ will likely book air travel (N=1018). Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2017.

Net Promoter



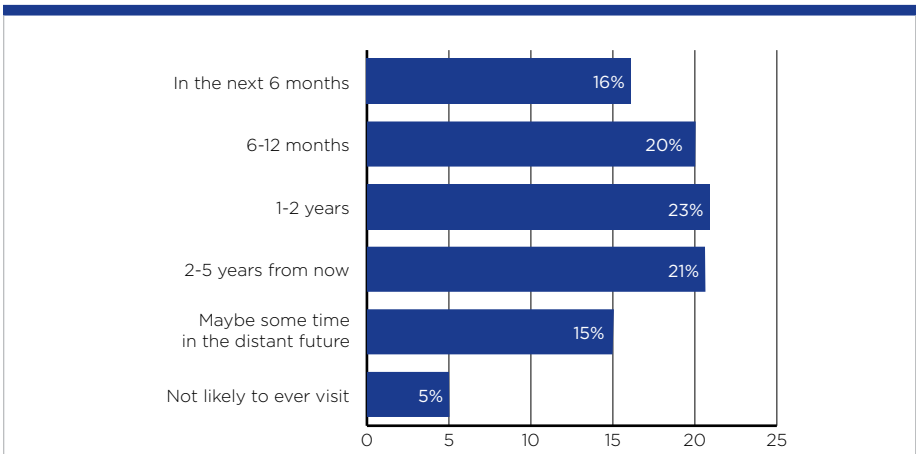
Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?

Base: UK intercontinental travelers (N=1018).

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: UK intercontinental travelers 2016 (N=1059).

Source: Brand USA Market Intelligence Study 2017

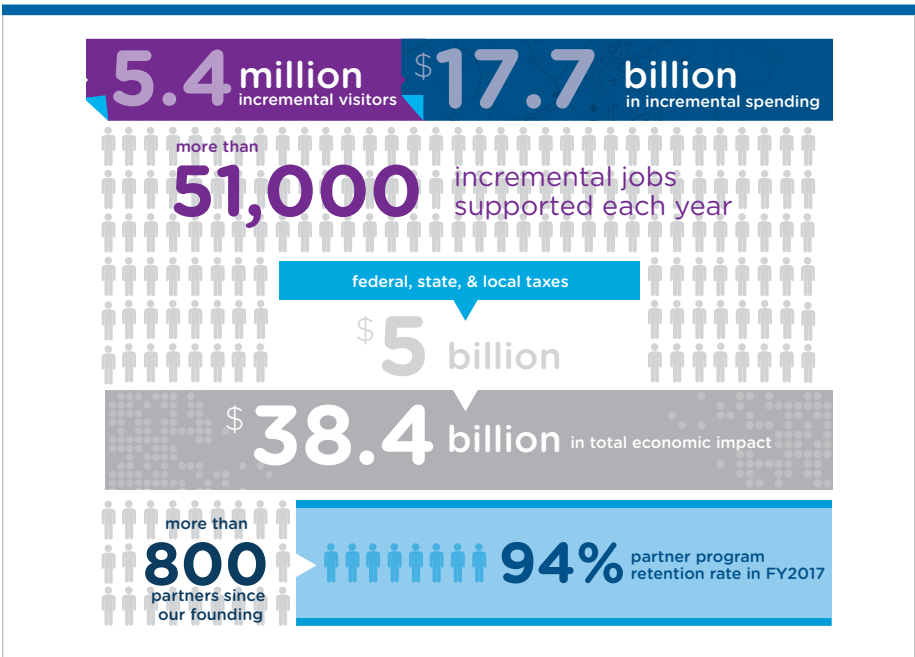
Brand USA Highlights

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
- 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 Association (UK) and Visit USA Committee, Ireland

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, in markets where Brand USA has established international representation and in select markets where the organization is not currently represented.

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About The U.S. Commercial Service

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



Contact:

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Ireland

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Our Partnership with the U.S. Department of Commerce



Brand USA collaborates closely with the International Trade Administration, U.S. Department of Commerce, through its National Travel and Tourism Office (NTTO) and U.S. Commercial Service Offices in international markets.

In addition, Brand USA works in close partnership with Visit USA committees in market and more than 800 contributing partners throughout the world to implement highly successful campaigns that are inspiring an increasing number of travelers to visit the USA.

The National Travel and Tourism Office (NTTO)

The NTTO is the federal liaison to Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA's annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal partners.

The NTTO also serves as the official source of national travel and tourism statistics to inform policy and private-sector decision making. These data are used by the Bureau of Economic Analysis to calculate the balance of payments for travel and tourism and measure the economic impact of international visitation to the United States. Furthermore, NTTO advances policies that support travel and tourism export growth and addresses export barriers in key international markets.

Contact:

The NTTO is located in the International Trade Administration of the Department of Commerce.

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