There are a wide range of exciting international visitor markets offering opportunity. Work through these seven steps to decide the ones that you should focus on. Which markets offer you the best combination of:

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<tbody>
<tr>
<td>#1 Canada</td>
<td>20.7 million arrivals. Moderate growth outlook.</td>
<td></td>
<td>Show off some softness due to the strong US dollar, Canada remains a critical foundation market. Highly familiar with the US, with strong air and road connections and a solid economy.</td>
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<td>#2 Mexico</td>
<td>18.4 million arrivals. Mixed outlook. Mexico remains a very important market with a growing middle class and deep connections to the US. The current cross border issues between the two countries present some short term challenges.</td>
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<tr>
<td>#3 United Kingdom</td>
<td>4.9 million arrivals. Modest outlook. The UK has returned to modest growth after some years of slow declines. UK visitors are often regular, repeat U.S. travelers – and different segments seek both the familiar and the “off the beaten path” U.S. experiences.</td>
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<td>#4 Japan</td>
<td>3.8 million arrivals. Modest outlook. Despite uneven growth and the rise of China, Japan remains the biggest Asian market in US arrivals. It has a growing number of independent travelers and the second largest number of affluent (High Net Worth) travelers in the world (after the USA).</td>
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<td>#5 China</td>
<td>2.5 million arrivals. Strong outlook. Already world tourism’s No. 1 source market, China promises continued strong growth. For many destinations the challenge will be managing growth in the group market while targeting the affluent, FIT Chinese visitor for yield.</td>
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<td>#6 Germany</td>
<td>2.3 million arrivals. Moderate outlook. The economic “engine room” of Europe, Germans are adventurous global travelers. They stay a long time (18 nights on average) and seek diverse adventures from nature to big cities.</td>
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<td>#7 Brazil</td>
<td>2.2 million arrivals. Strong outlook. Recent economic and political challenges have flattened growth in Brazilian visitors to the US – after a decade of impressive expansion. Brazilians have softened their spending (with the strong US dollar vs the Real) but numbers remain robust.</td>
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<tr>
<td>#8 Australia &amp; New Zealand</td>
<td>1.8 million arrivals. Moderate to Strong outlook. World champions at global travel “Aussies” and “Kwis” continue to arrive in record numbers. Strong, repeat visitors, they often seek experiences well beyond the gateways.</td>
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<tr>
<td>#9 France</td>
<td>1.8 million arrivals. Modest outlook. Counter to a weak economy French visitors continue to arrive in record numbers. They are particularly fascinated by the “American lifestyle” and culture.</td>
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GOING GLOBAL: overview of U.S. international visitor marketing

**Importance of Information used in selecting U.S. Destinations by International Visitors.**

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percentage</th>
<th>Range</th>
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<tbody>
<tr>
<td>Online Sources</td>
<td>64%</td>
<td>56 - 74%</td>
</tr>
<tr>
<td>Friends &amp; Family</td>
<td>43%</td>
<td>24 - 57%</td>
</tr>
<tr>
<td>Printed Information</td>
<td>32%</td>
<td>23 - 42%</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>30%</td>
<td>18 - 47%</td>
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</tbody>
</table>

Average of top 10 US markets. Ranges cover differences amongst U.S. international markets.

**U.S. Travelers are:**

- **40-60%** Free & Independent Travelers F.I.T.
- **20-40%** Semi-Free & Independent Travelers S.I.T.
- **8-28%** Pre-Paid Packages and Tours Including Group Tours

**Tourism Marketing $$ Direct to Consumers & via Trade**

- **$43 Billion** Airline Receipts Included
- **$246 Billion** International Visitor Spending
- **78 Million** International Visitors

**Travel Agents & International Tour Operators**

**Receptive/Inbound Tour Operator**

**Dreaming**
At the Dreaming and Planning Stages international travelers turn to online resources as their most important source of information in selecting where to go and things to do.

**Planning**
Planning timelines are tightening in many international markets but typically range from 1 to 5 months for decisions on where to go and in making key initial bookings e.g., airfares.

**Activation**
At the Activation or Booking stage the Travel Trade (e.g., Travel Agents) become important – especially for product likely to be pre-booked such as flights, cruises, hotels in gateway cities and major attractions.

**Experiencing**
Length of stay varies from 7 nights (Mexico) to 18 nights (Germany) with an average spend of around $2,400 USD. Most international visitors have been to the U.S. before.

**Sharing**
Over two-thirds of all international visitors use Social Media and Digital Devices to share their experiences with friends and family while in the U.S. Make sharing easy by offering low cost or free WiFi.

**Average Trip Length** 14 nights / First trip to U.S. 27% / $2,400 per person

96% of international travelers carry at least one digital device.

Sources:
Brand USA, Phocuswright, National Tourism and Travel Office, GITA, Skift, Destination Analysts, WTTC.
See back page for more.
Plan to go Global
Plan for a Smart Balance of Consumer & Trade Marketing

Balance of consumer & trade marketing

**CONSUMER**

**International Content**
Tell your story in images, online video & editorial. Create & curate content and invest in both natively written & translated content.

**Content Marketing**
Optimize, distribute, share & promote your content via Owned, Earned & Paid channels incl. an international section of your website.

**Online & Offline Advertising**
Reach potential visitors through targeted advertising.

**Social, PR & Events**
Host visiting media from key markets, leverage PR, social media (esp: online ‘Influencers’) & consumer events.

**Activation**
Offer travelers choice in booking incl. via trade partners & direct.

---

**TRADE**

**Find the Right Partners**
Options include Wholesalers & Travel Agencies in your priority markets, Online Travel Agencies, Tour Operators incl. niche specialists & (where needed) local, Receptive Tour Operators (RTOs).

**Provide Content to Trade Partners**
Especially great imagery, itineraries, video.

**Market with Partners**
Be ready to support marketing activities to help drive bookings eg: agents brochures, coop advertising, PR, events etc.

**Trade Events**
Attend key trade events (eg: IPW) to meet/update existing trade partners & find new partners.

**Training, Education & Famils**
Update, upskill & host (via famils) trade partners in your destination &/or product destination and/or product(s).

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**Smart Balance**
The right balance will depend on your business, product and market. Start with a rough rule of thumb of: 
50 - 50

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7 Steps to a successful international marketing plan

1. **Select Your International Markets**
Walk through the steps on page 1 to decide your priority international markets. Look for a spread of markets that maximize your growth opportunities and minimizes risks by spreading your business.

2. **Develop an International Marketing Plan**
Develop an International Marketing Plan and ensure it is integrated with your overall marketing plan. You can often re-purpose and adapt content and campaigns where appropriate for international markets.

3. **Set Targets & Objectives**
Identify the specific travelers within each international market you want to target and define business objectives (e.g., lifting international room nights from 10 to 20% over the next 2 years) and specific campaign objectives including online and via the trade.

4. **Create & Curate International Content**
At the heart of any international marketing is telling your story in the form and language that will engage with international visitors. Consider natively written (original and specific to that market) as well as translated content.

5. **Consumer & Trade Marketing Programs**
Use the Check List above to develop a balanced approach to both marketing direct to consumers and ensuring the trade is ready to respond to their interest. This push-pull strategy works best.

6. **Budget for Success**
Based on your objectives define a budget that will allow you to succeed. Include resources and $$ against both trade and consumer markets. A rough rule of thumb is that your international marketing budget should be a minimum 10-20% of your overall marketing budget.

7. **Review & Refine**
Measure, monitor and manage. Change your international marketing efforts based on the results – both via the trade, in marketing programs with partners like Brand USA and via your own channels such as website or social media analytics.

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**Sources:**
- Brand USA International Research Insights http://thebrandusa.com
- National Tourism & Travel Office (U.S. Dept. of Commerce)
- U.S. Travel Association www.ustravel.org/research
- World Travel & Tourism Council http://www.wttc.org/research
- SITA (Airport & Airline Industry) http://www.sita.aero/resources/type/surveys-reports
- Phocuswright www.Phocuswright.com
- Skift www.skift.com


For additional research, resources and Brand USA co-op opportunities, visit www.MilesPartnership.com/BrandUSA