



U.S. TRAVEL

A S S O C I A T I O N[®]

Global Competitive Analysis

PROVIDED BY:  EUROMONITOR
INTERNATIONAL

COMMISSIONED BY: U.S. TRAVEL
ASSOCIATION*

MOST DESIRED DESTINATIONS

#1 UNITED STATES

SPAIN

FRANCE

ITALY

CANADA

JAPAN

AUSTRALIA

MEXICO

UNITED KINGDOM

GREECE

Source: Future Partners
(January 2023)

TOP VISITED DESTINATIONS

FRANCE

SPAIN

#3 UNITED STATES

ITALY

TURKEY

MEXICO

UNITED KINGDOM

GERMANY

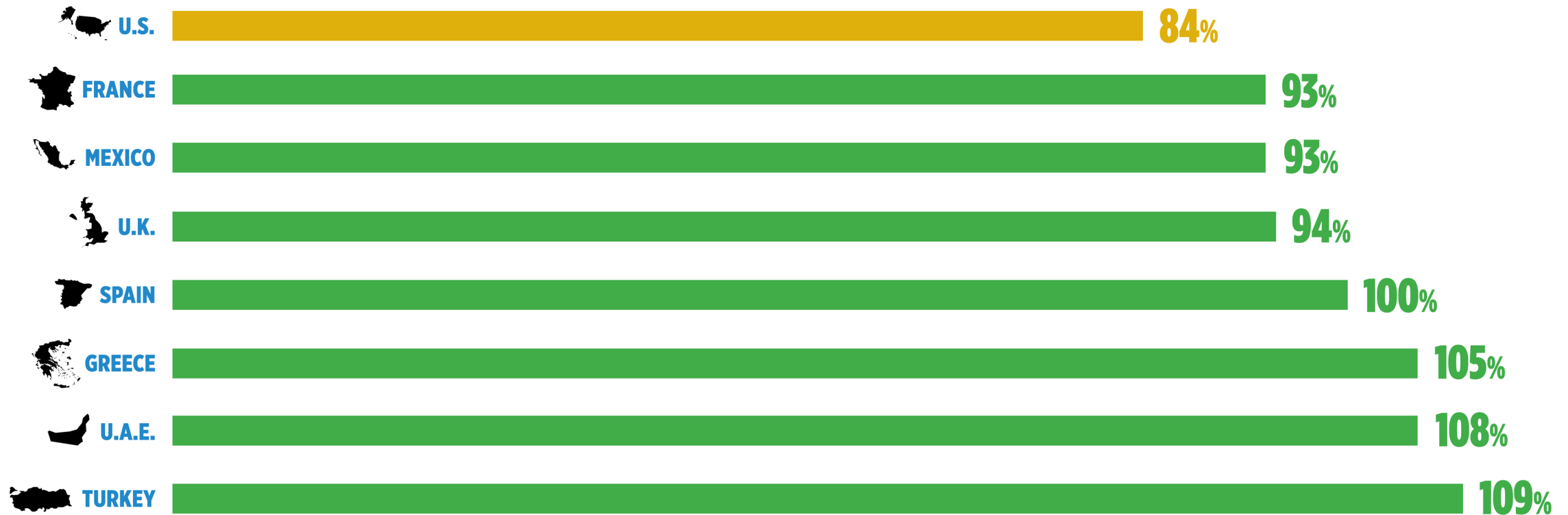
GREECE

CHINA

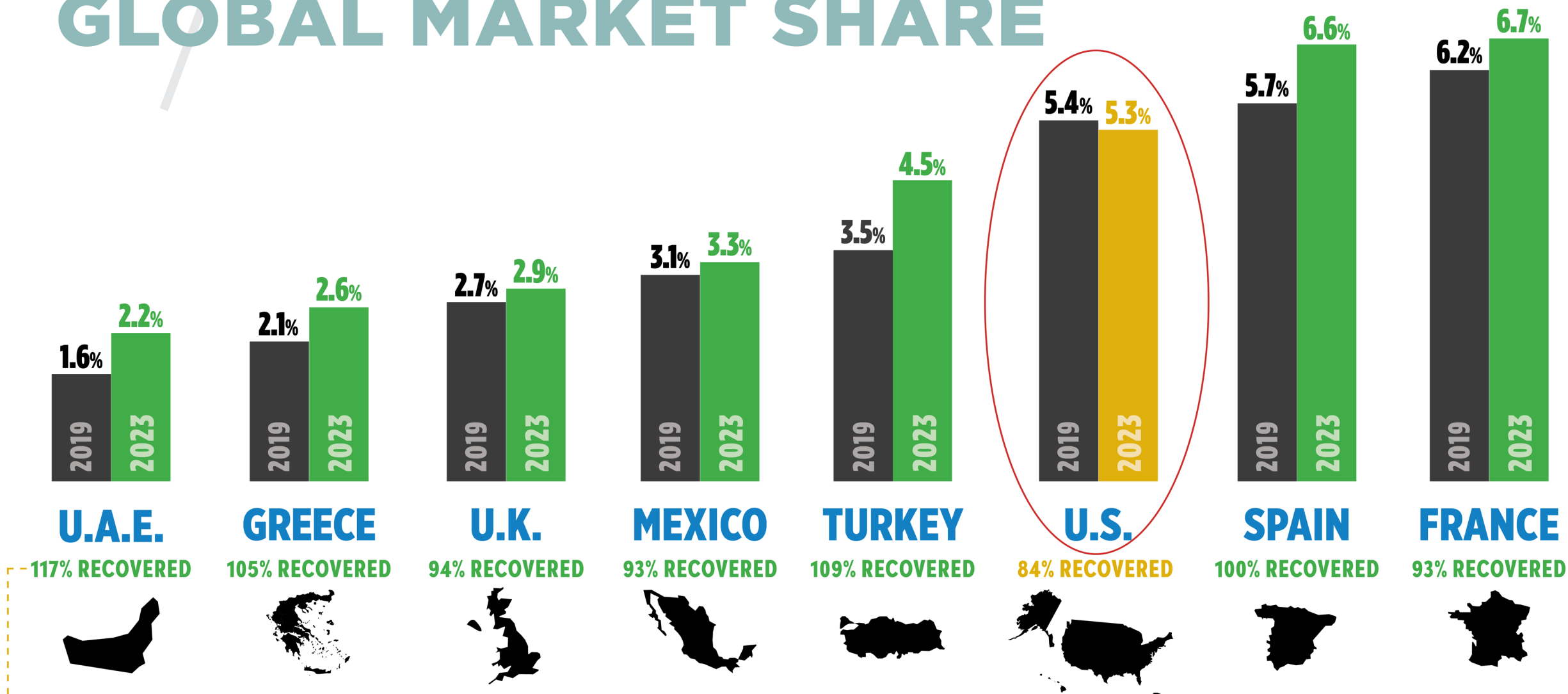
Source: Tourism Economics
(2023 Forecast)

INTERNATIONAL COMPETITIVENESS: INTERNATIONAL VISITS

INTERNATIONAL VISITOR ARRIVALS IN 2023*
% OF 2019 LEVEL



TOTAL INBOUND GLOBAL MARKET SHARE



GLOBAL COMPETITIVE ANALYSIS

AGAINST 17 COUNTRIES

AUSTRALIA

BRAZIL

CANADA

CHINA

FRANCE

GREECE

GERMANY

ITALY

MEXICO

SAUDI ARABIA

SINGAPORE

SOUTH AFRICA

SPAIN

THAILAND

TURKEY

UNITED ARAB EMIRATES

UNITED KINGDOM

FOUR CATEGORIES OF ANALYSIS

A photograph of three business professionals (two men and one woman) in an office setting, leaning over a desk and looking at documents. The image is overlaid with a semi-transparent teal filter.

**NATIONAL
LEADERSHIP**

A solid dark teal rectangular background.

**BRAND &
PRODUCT**

A close-up photograph of a hand holding a pen, with a blurred background. The image is overlaid with a semi-transparent blue filter.

**IDENTITY, SECURITY
& FACILITATION**

An aerial photograph of a city with a grid-like street pattern, overlaid with a semi-transparent dark blue filter.

**TRAVEL &
CONNECTIVITY**



**NATIONAL
LEADERSHIP**

25%



**BRAND &
PRODUCT**

20%



**IDENTITY, SECURITY
& FACILITATION**

35%



**TRAVEL &
CONNECTIVITY**

20%

U.S. RANKINGS

RANK

2/18

TRAVEL PROMOTION

2019-2022

RANK

18/18

GOVERNMENT LEADERSHIP

RANK

18/18

NATIONAL STRATEGY

RANK

6/18

**IPSOS NATION
BRAND INDEX**

RANK

13/18

**WEF SAFETY &
SECURITY INDEX**

RANK

4/18

TRUSTED TRAVELER PROGRAMS

**FALLING
BEHIND**

DOMESTIC PAX SCREENING

**FALLING
BEHIND**

CUSTOMS & ENTRY

RANK

12/18

VISA WAIVER

RANK

18/18

VISA WAIT TIME

RANK

1/18

**IATA AIR
CONNECTIVITY SCORE**

RANK

11/18

**CHANGE IN
INBOUND ARRIVALS**

2019-2022

U.S. Lacks High Level Federal Leadership

Rank	Country	Office/Level
1	Thailand	Ministry of Tourism and Sports
2	Brazil	Ministry of Tourism
3	Greece	Minister of Tourism
4	Saudi Arabia	Minister of Tourism
5	Turkey	Ministry of Culture and Tourism
6	South Africa	Minister of Tourism
7	Italy	Minister of Tourism
8	China	Minister of Trade and Tourism
9	Canada	Minister of State for Foreign Trade, Tourism and French Nationals Abroad

Rank	Country	Office/Level
10	Australia	Department of Economy and Tourism (Ministry of Economy)
11	France	Minister of Tourism and Heritage
12	UAE	Ministry of Tourism
13	United Kingdom	Ministry of Industry, Trade and Tourism
14	Mexico	Ministry of Tourism
15	Spain	Ministry of Industry, Trade and Tourism
16	Germany	Federal Minister for Economic Affairs and Climate Action
17	Singapore	Singapore Tourism Board
18	USA	Deputy Assistant Secretary of Travel and Tourism

U.S. National Leadership: Needs Specific Policies and Funding to Achieve Goals

Rank	Country	Score
1	Canada	4.2
2	United Arab Emirates	4.0
3	Saudi Arabia	3.8
4	South Africa	3.8
5	China	3.6
6	Turkey	3.6
7	Mexico	3.6
8	Greece	3.6
9	Singapore	3.4

Rank	Country	Score
10	France	3.4
11	Australia	3.0
12	Thailand	3.0
13	United Kingdom	2.8
14	Spain	2.6
15	Italy	2.4
16	Germany	2.4
17	USA	2.4
18	Brazil	2.4

Visa Waiver Policies: U.S. Falls Behind

Rank	Country	# of Countries with Visa Waivers
1	South Africa	103
2	United Kingdom	102
3	France	95
4	Italy	95
5	Spain	95
6	Germany	95
7	Turkey	80
8	Mexico	70
9	Brazil	68

Rank	Country	# of Countries with Visa Waivers
10	Thailand	64
11	Canada	55
12	USA	42
13	United Arab Emirates	40
14	Singapore	34
15	Greece	31
16	China	20
17	Saudi Arabia	5
18	Australia	0

Visa Wait Times: U.S. Ranks Last

Rank	Country	# of Days
1	Australia	1
2	Turkey	1
3	Saudi Arabia	1.5
4	UAE	3.5
5	China	4
6	Singapore	4
7	Thailand	4
8	Brazil	7.5
9	Mexico	8.5

Rank	Country	# of Days
10	United Kingdom	21
11	France	45
12	Germany	45
13	Greece	45
14	Italy	45
15	Spain	45
16	South Africa	70
17	Canada	85+
18	USA	162+

Customs and Entry: U.S. Leads in Some Areas, Lags Behind in Customer Experience

Rank	Country	Wait Time Score (1-5)
1	Italy	4.50
2	Germany	4.25
3	China	4.25
4	Turkey	4.25
5	Singapore	4.00
6	Australia	4.00
7	Canada	3.75
8	France	3.50
9	Spain	3.50

Rank	Country	Wait Time Score (1-5)
10	UAE	3.50
11	Saudi Arabia	3.50
12	USA	3.00
13	United Kingdom	3.00
14	Mexico	3.00
15	Brazil	3.00
16	Greece	2.75
17	Thailand	2.50
18	South Africa	2.00

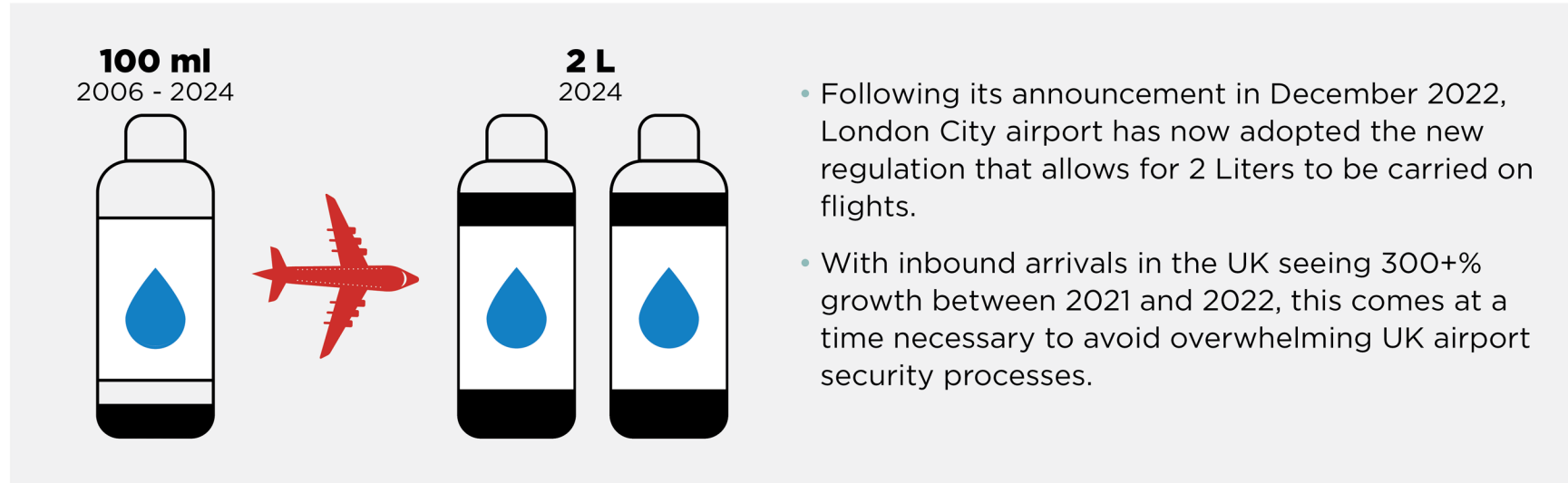
Biometric Capabilities: Many U.S. Airports Lag Behind

Rank	Country	% of International Airports
1	Thailand	100%
2	China	86%
3	Canada	71%
4	South Africa	67%
5	United Kingdom	62%
6	United Arab Emirates	60%
7	Australia	56%
8	Singapore	50%
9	Germany	44%

Rank	Country	% of International Airports
10	USA	36%
11	France	21%
12	Brazil	19%
13	Spain	15%
14	Italy	10%
15	Mexico	8%
16	Saudi Arabia	7%
17	Turkey	5%
18	Greece	5%

The U.S. has significantly more commercial service airports than the other 17 countries considered in this report. While CBP utilizes Biometric Facial Comparison Technology for international arrivals at 238 airports, biometric exit technology is only utilized at 44 airports. Of the 440 federalize airports where TSA operates, only 25 utilize biometric facial matching technology.

UK Airport Security: Implementation of CT Technology will Expedite the Traveler Experience



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By 2024, major airports across the UK will have the latest security tech installed, reducing queuing times, improving the passenger experience, and most importantly detecting potential threats.... Of course, this won't happen straight away – this is going to take 2 years to be fully implemented. Until then, passengers must continue following the existing rules and check before traveling.

– Mark Harper, UK Transport Secretary**

CT Tech to be implemented in other countries paves the way for others to follow

- Some airports in the USA and Netherlands (Schiphol) have also invested in and set up these new CT X-Ray machines.
- Spain is set to follow suit with airports like Madrid-Barajas and Barcelona-El Prat in 2024, and others to follow in 2025. The changes will allow travelers departing Spain to leave with bottles of wine, olive oil or jars of honey in their carry-on luggage.

* CT refers to Computed Tomography, a computerized X-ray imaging procedure ; **GOV.UK, Forbes, Smithsonian Magazine, EuroNews

Overall U.S. Competitiveness Score

Rank	Country	Score
1	United Kingdom	72/100
2	France	66/100
3	Turkey	65/100
4	Italy	61/100
5	Canada	59/100
6	UAE	59/100
7	Spain	58/100
8	Germany	54/100
9	Greece	52/100

Rank	Country	Score
10	Thailand	52/100
11	Australia	51/100
12	Brazil	50/100
13	Saudi Arabia	50/100
14	South Africa	49/100
15	Mexico	49/100
16	Singapore	47/100
17	USA	47/100
18	China	47/100

THE ECONOMIC IMPACT AND OPPORTUNITY OF ADDRESSING OUR GLOBAL COMPETITION SHORTFALLS

Identity, Security and Travel Facilitation: Domestic Pax Screening

- The inefficient aviation security screening process could deter American travelers from as many as **three million domestic trips this year, resulting in spending losses of \$7.4 BILLION.**

Identity, Security and Travel Facilitation: Customs and Entry

- Inbound travelers **wait upwards of TWO HOURS** at **Customs checkpoints** when airports cannot accommodate new flights due to staffing shortages.
- When a new daily international flight (Boeing 787-10) cannot be accommodated due to Customs and Border Protection staffing shortages, **the U.S. economy loses up to \$227 MILLION PER YEAR.**

THE ECONOMIC IMPACT AND OPPORTUNITY OF ADDRESSING OUR GLOBAL COMPETITION SHORTFALLS

Identity, Security and Travel Facilitation: Visa Wait Times

- The U.S. risks losing **39 MILLION VISITORS AND \$150 BILLION** in spending over the next 10 years due to excessive visitor visa wait times.

Identity, Security and Travel Facilitation: Opportunities

- In 2024, the U.S. could gain **2.4 MILLION MORE** visitors if the market were unconstrained by visa wait times.
- Each country that has been added to the Visa Waiver Program sees a boost in visitation to the U.S.
 - The five countries added to the program from 2008 to 2014 experienced a **52% GAIN in visitation to the U.S.** over the first three years.
 - Visits to the U.S. from South Korea **increased BY 60% by its third year in the VWP** and visits from Slovakia surged **70% OVER THE FIRST THREE YEARS** in the program.

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Seth Stodder, Former Assistant Secretary for Borders, Immigration, & Trade Policy, Department of Homeland Security

TSA

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John Sanders, Former Acting Commissioner & Chief Operating Officer, U.S. Customs & Border Protection; Former Assistant Administrator, Chief Technology Officer, Transportation Security Administration

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DOT/FAA

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