

# Euromonitor Competitive Analysis

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**SAMPLE POSTS FOR TWITTER/X**

International inbound travel fuels the economy, but the U.S. is losing global market share. A new @UStavel study reveals the U.S. lags behind global competitors in areas like visa wait times & national leadership. We’re falling behind. It’s #TimeToLead: <https://bit.ly/3vpEfC4>

The U.S. is trailing behind peers in the race to modernize travel, per @UStavel’s recent study. It’s #TimeToLead—and a new commission will help get there by building a vision & blueprint for more a seamless & secure travel experience. <https://bit.ly/3vpEfC4>

Eye-opening @UStavel study: The U.S. ranks nearly last in the race to modernize travel while global competitors take bold steps forward. This hurts our ability to welcome intl visitors & drive economic growth. Our opportunity is now—it’s #TimeToLead: <https://bit.ly/3vpEfC4>

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# Global Competitive Analysis

*Use this document to inform conversations with policymakers, community leaders and local media outlets. The below summarizes our findings and underscores the importance of public-private partnerships to develop solutions to help the U.S. claim our spot as the top destination in the world—a result that will pay dividends for decades to come.*

**THE PROBLEM:** The U.S. is falling behind in the race to grow and modernize travel. While the U.S. remains the world’s most desired destination for travelers, it ranks only third in visitation, behind France and Spain. While top global competitors are fully recovered from the pandemic and increasing market share, the U.S. is only 84% recovered and its market share has *declined* (from 5.4% in 2019 to 5.3% in 2023).

**THE ANALYSIS:** The U.S. Travel Association commissioned Euromonitor International, a global research firm, to assess U.S. competitiveness against 17 other top countries for global travel so U.S. officials—and private sector partners—can better understand how to improve the overall travel experience, increase U.S. competitiveness and ultimately grow U.S. market share.

The study compared the 18 countries (including the U.S.) across four categories:

- **National Leadership**
- **Brand and Product**
- **Identity, Security and Facilitation**
- **Travel and Connectivity**

**THE FINDINGS ARE A WAKE-UP CALL:** Overall, the U.S. ranked 17 out of 18 countries analyzed—second to last. The U.S. notably underperformed in the categories of **National Leadership and Identity, Security and Facilitation.**

**THE U.S. IS HINDERED BY SELF-IMPOSED BARRIERS:** Restrictive visitor visa policies and lengthy wait times, a lack of focused federal leadership, outdated security screening practices, and decades of underinvestment prohibit the U.S. from claiming its spot as the top visited destination in the world—and constrict future growth.

**TRAVEL BARRIERS COST THE U.S. ECONOMY BILLIONS OF DOLLARS (TOURISM ECONOMICS):**

- Each time a new daily international flight to one airport cannot be accommodated due to Customs staffing shortages, the U.S. economy loses **\$227 million per year.**
- The U.S. could **lose 39 million visitors and \$150 billion in spending** over the next 10 years if there is no reduction in visa wait times.

- The unevolved, inefficient airport security screening process could deter American travelers **from an estimated three million trips** this year, resulting in total spending **losses of \$7.4 billion**.

### **SOLVING TRAVEL FACILITATION ISSUES COULD GENERATE BILLIONS FOR THE ECONOMY (TOURISM ECONOMICS):**

- In 2024, the U.S. could *gain* 2.4 million more visitors and \$7.3 billion in spending if the market were unconstrained by visa wait times.
- Expanding the Visa Waiver Program (VWP) is also a significant tool in boosting competitiveness; the last three countries added to the program saw 18% increases in average annual visitation growth within the first three years.
  - Overall [visitation from South Korea](#) increased by two-thirds by its third year in the VWP (*U.S. Department of Commerce*).

**CONCLUSION:** U.S. competitiveness will continue to lag unless specific federal policies and public-private partnerships are enacted to address shortcomings in the travel experience, as spotlighted by Euromonitor’s global competitiveness analysis. It is time for U.S. officials to establish a clear vision for how to improve the travel experience, increase global competitiveness and facilitate growth to benefit the United States.

**U.S. TRAVEL’S RESPONSE:** On January 11, U.S. Travel launched a solutions-oriented Seamless and Secure Travel Commission—which will bring together former government officials and private sector executives—to identify policy recommendations that can be realized in the near term. The commission will also establish a 10-year vision to create a more seamless and secure travel experience, outlining ways the federal government can work with the travel industry on opportunities to enhance the travel process and facilitate growth.