



U.S. TRAVEL  
ASSOCIATION®

# 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

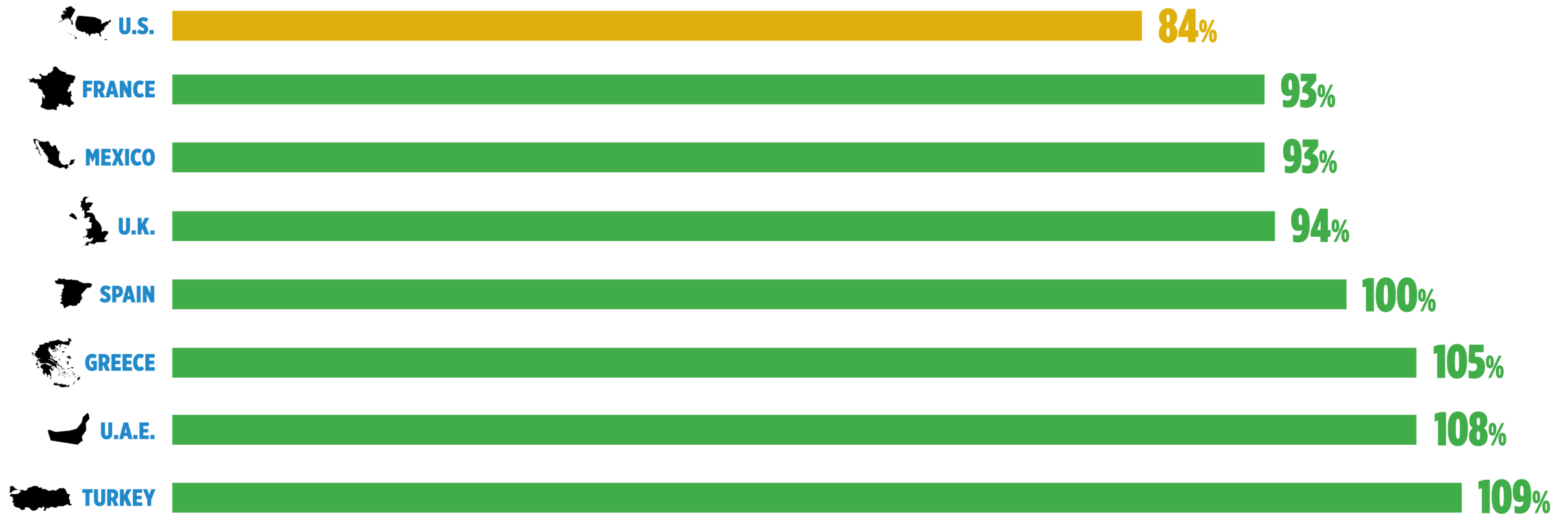
GREECE

CHINA

Source: Tourism Economics  
(2023 Forecast)

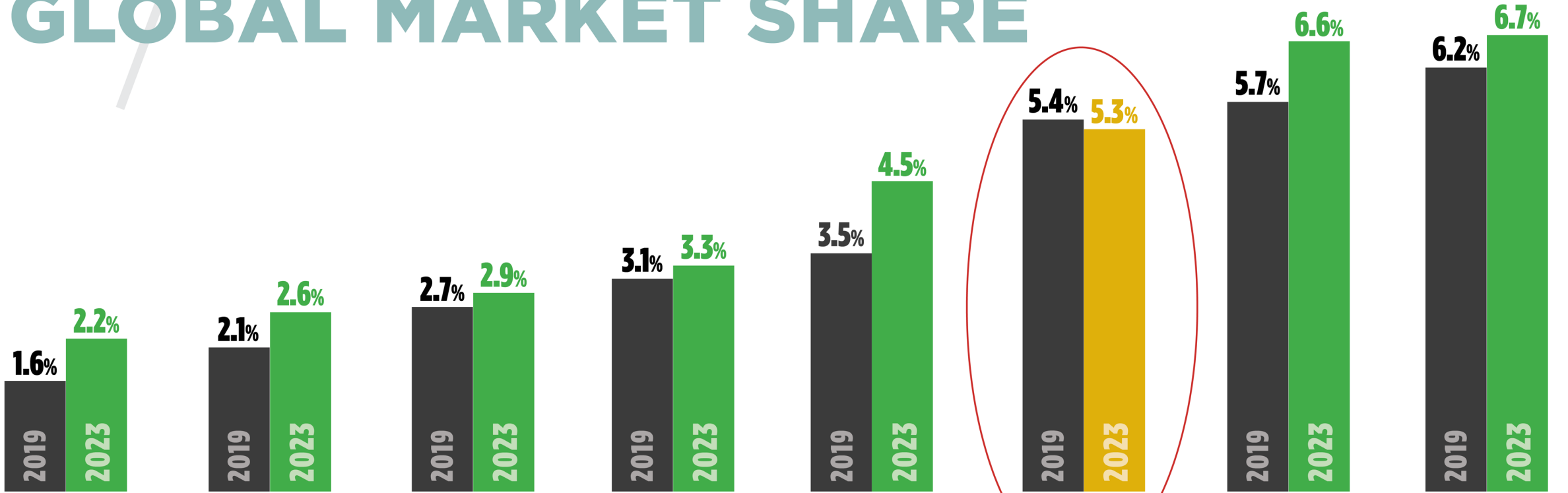
# INTERNATIONAL COMPETITIVENESS: INTERNATIONAL VISITS

INTERNATIONAL VISITOR ARRIVALS IN 2023\*  
% OF 2019 LEVEL



\* Full-year forecast based on Q1-Q3 historic database

# TOTAL INBOUND GLOBAL MARKET SHARE



**U.A.E.**

**GREECE**

**U.K.**

**MEXICO**

**TURKEY**

**U.S.**

**SPAIN**

**FRANCE**

117% RECOVERED

105% RECOVERED

94% RECOVERED

93% RECOVERED

109% RECOVERED

84% RECOVERED

100% RECOVERED

93% RECOVERED



RECOVERY RATE IS 2023 COMPARED TO 2019

SOURCE: Tourism Economics (Global Travel Service) forecast, October 20, 2023

# 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 in a meeting, looking at documents on a table. The image is overlaid with a semi-transparent teal filter.

**NATIONAL  
LEADERSHIP**

A dark teal background with a large, semi-transparent number '2' in the center.

**BRAND &  
PRODUCT**

A close-up photograph of a hand holding a small electronic device, possibly a smartwatch or a small tablet. The image is overlaid with a semi-transparent blue filter.

**IDENTITY, SECURITY  
& FACILITATION**

An aerial photograph of a city, showing buildings, streets, and infrastructure. The image is 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
<b>18</b>	<b>USA</b>	<b>Deputy Assistant Secretary of Travel and Tourism</b>

## 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
<b>17</b>	<b>USA</b>	<b>2.4</b>
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
<b>12</b>	<b>USA</b>	<b>42</b>
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+
<b>18</b>	<b>USA</b>	<b>162+</b>

## 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
<b>12</b>	<b>USA</b>	<b>3.00</b>
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
<b>10</b>	<b>USA</b>	<b>36%</b>
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

**100 ml**  
2006 - 2024

**2 L**  
2024

- Following its announcement in December 2022, London City airport has now adopted the new regulation that allows for 2 Liters to be carried on flights.
- With inbound arrivals in the UK seeing 300+% growth between 2021 and 2022, this comes at a time necessary to avoid overwhelming UK airport security processes.

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 procedur ; \*\*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
<b>17</b>	<b>USA</b>	<b>47/100</b>
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.

# SEAMLESS & SECURE TRAVEL COMMISSION

## CHAIR

**Kevin McAleenan**, Former Acting Secretary of Homeland Security; Former Commissioner & Deputy Commissioner, U.S. Customs & Border Protection

## DHS

**Stewart Baker**, Former General Counsel, National Security Agency; Former Assistant Secretary for Policy, Department of Homeland Security

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

## CONGRESS

**Hon. John Katko**, Former House Homeland Security Committee Ranking Member

## TSA

**Patty Cogswell**, Former Deputy Administrator, Transportation Security Administration

**John Pistole**, Former Administrator, Transportation Security Administration

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

## STATE DEPARTMENT/INTERNATIONAL

**Martha Bárcena Coqui**, Former Mexican Ambassador to the United States

**Jeff Bleich**, Former American Ambassador to Australia

## DOT/FAA

**Lucy Chadwick**, Former Director General, International, Security & Environment Group, U.K. Department for Transport

**Michael Huerta**, Former Administrator, Federal Aviation Administration

## FACILITATION/INFRASTRUCTURE

**John Holland Kaye**, Former CEO of Heathrow Airport

**Shawn Kinder**, Global Corporate Development and Strategy Director, Ferrovial Airports

**Marlon R. Smith**, Managing Director of Public Infrastructure & Communications, JLC Infrastructure

**Brent Tasugi**, Managing Director at I Squared Capital

**Bloomberg**

\$1.2 Trillion US Travel Industry  
Is Plummeting, Says New Study

**TheMessenger.**

US Does a Woeful Job Attracting International  
Visitors, Travel Lobby Group Says

**Business Traveler**

U.S. Travel Industry Struggles to Recover:  
Ranks 17th Globally in New Report

**TRAVEL WEEKLY**

Is The Government Failing Travel?

# GEOFF FREEMAN ON CNBC'S "SQUAWK ON THE STREET"

**U.S. GROWTH HINDERED**  
U.S. TRAVEL ASSOCIATION CEO:

- Underinvestment at the federal level
- Lengthy wait times for visitor visas: avg. 400 days in top markets
- Shortage of air traffic controllers to meet current demand

9:48 A CENTRAL **TRAVEL TROUBLES**

**U.S. Travel Association CEO: We lack a national strategy to attract visitors to the country**

“

While we inch back to pre-pandemic travel numbers, other countries are advancing strategies to gain international visitors and are now ahead of the U.S. in the race to win back the global travel market.



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