



# U.S. Competitive Analysis

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U.S. Travel Association

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U.S. TRAVEL  
ASSOCIATION®



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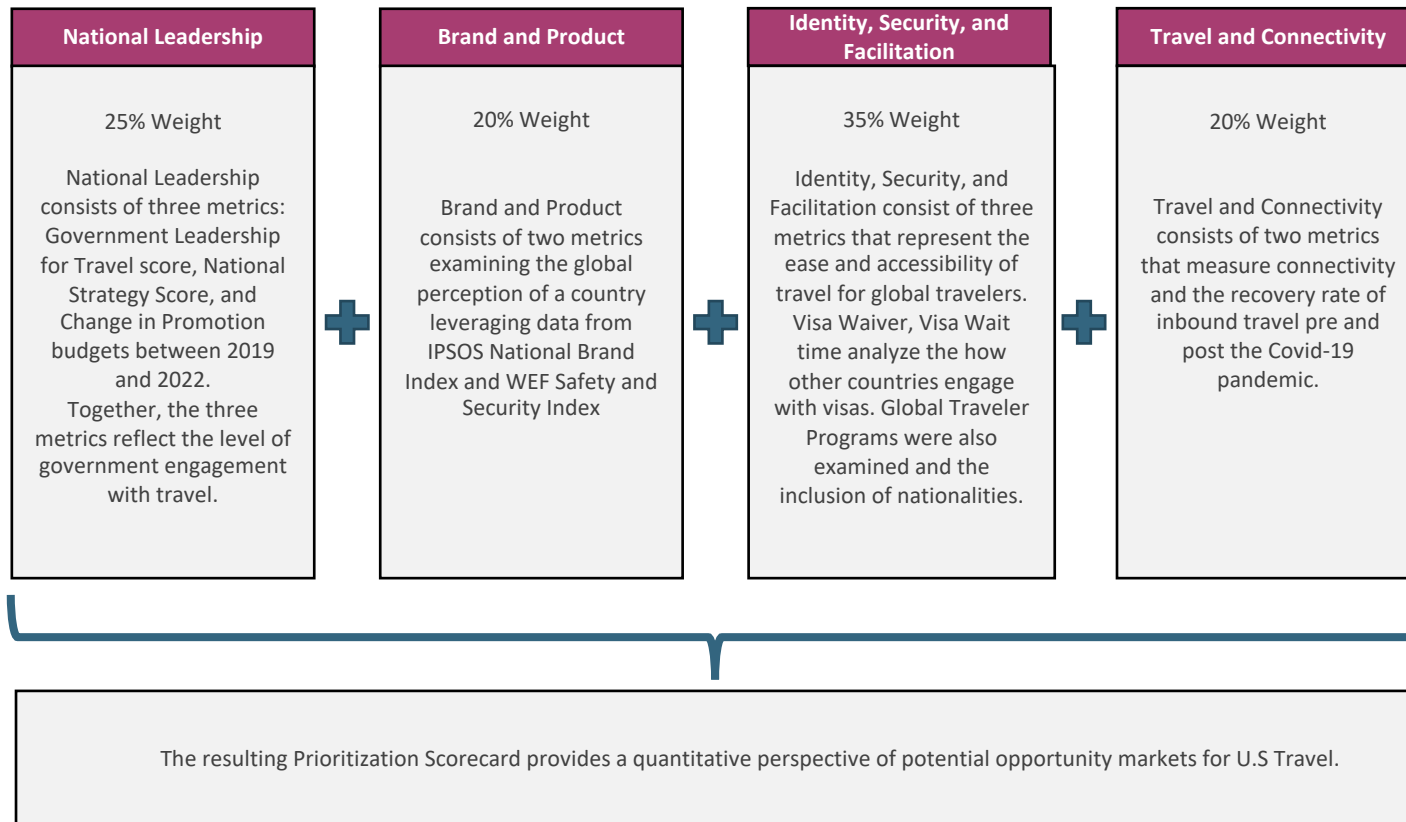
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## The U.S. Competitiveness Scorecard considers the following:



Total country ranking criteria consisted of 10 metrics. Adjustable weighting option was provided to U.S. Travel Team

			Weight Total		100%
Pillar	Metric	Unit	High/Low	Weight	Note
National Leadership	Travel Government Entity Score	Score	High	10.0%	Relevance in government structure of travel entity (ranking going from a Travel Board entity equivalent to the lowest level to the highest such as a "cabinet level" entity).
National Leadership	National Strategy Rank	Rank	High	10.0%	A ranking of a nation's national strategy regarding travel per inputs including the plan itself, the COVID recovery aspect, promotion, and years included in the proposal.
National Leadership	Change in Travel Promotion budget (%), 2019 - 2022	%	High	5.0%	Percentage change in budget for Travel Promotion (2022 vs 2019).
Brand and Product	IPSOS Nation Brands Index, 2022	Score	High	10.0%	Annual Study that gathers perceptions of countries around the world.
Brand and Product	WEF Safety and Security Index, 2021	Score	High	10.0%	World Economic Forum, Safety and Security Pillar measures the extent to which a country exposes locals, tourists and businesses to security risks.
Identity, Security, and Facilitation	Visa Waiver	# of countries	High	15.0%	The number of other countries where citizens can visit without a visa.
Identity, Security, and Facilitation	Visa Wait Time	# days	Low	15.0%	Process time of travel visa application after submission.
Identity, Security, and Facilitation	Traveler Program	# of countries	High	5.0%	Number of countries included in programs that allow expedited clearance for pre-approved, low-risk travelers upon arrival in country. (Some countries do not offer these type of programs).
Travel and Connectivity	IATA Connectivity Index Rank, 2022	Rank	High	15.0%	Measures connectivity as scheduled passenger capacity weighed by the relative economic scale of destinations served. It reflects the degree to which a city or a country is connected to the air transportation network, global or regional.
Travel and Connectivity	Change in Inbound Travel, 2019-2022	%	High	5.0%	Recovery Rate of inbound travel pre to post COVID.
Metrics Analyzed Qualitatively (Not included in Scorecard)					
Travel and Connectivity	Customs Time Clearance	Score	N/A		Number of minutes it took to clear customs screening (based on Skytrax review/ratings continuously updated dashboard)
Travel and Connectivity	Biometric Capabilities	%	N/A		Percent of international airports in a country that are equipped with biometric technology for passenger screening



# The scorecard results are most heavily impacted by visa related metrics and connectivity

Scorecard Results		
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	United Arab Emirates	59/100
7	Spain	59/100
8	Germany	58/100
9	Greece	54/100
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

## Top Markets by Key Metrics included in Scorecard

### Visa Wait Time

Rank	Country	Days
3	Turkey	1
11	Australia	1
6	UAE	3.5
16	Singapore	4
10	Thailand	4

Visa wait times were reported in number of days. The highest scoring country in this metric was Turkey, with a reported wait time of 1 day. This metric was given a weight of 15%

### Visa Waiver

Rank	Country	No. of Countries
14	South Africa	103
1	United Kingdom	102
2	France	95
4	Italy	95
7	Spain	95

This metric measures the number of other countries where citizens can visit without a visa and helps convey ease of travel. South Africa leads this metric with 103 countries followed by the United Kingdom with 102. France, Italy, and Spain are close behind in the Schengen Area, the World's largest visa free zone. This metric was given a weight of 15%

### IATA Connectivity Index Rank, 2022

Rank	Country	Score
17	USA	89.9%
1	United Kingdom	79.7%
8	Germany	54.7%
7	Spain	51.6%
2	France	51.2%

The IATA Connectivity Index reflects the degree to which a country is connected to the air transportation network. The United States performs strongly in this metric due to its role as a global hub to connect travelers within the US and around the world. The remaining high-ranking countries are from the Schengen Area. This metric was given a weight of 15%

### IPSOS Nations Brand Index, 2022

The highest ranked countries per the IPSOS Nation Brands Index were in Europe, North America, and Australia. This metric received a weight of 10%.

### Travel Government Entity Score

Nations who rely heavily on the economic inputs and outputs that travel bring will reflect that in the Travel Government Entity score. Thailand, Brazil, and Greece lead in the top three spots, understandably as travel and travel's share in GDP is higher than other nations that have a more diverse economy. This metric was weighed at 10%

Other Key Metrics

NOTE: Scorecard "score" is based on a weighted average across 10 metrics, with each metric weighted separately and normalized on a min/max scale of 0-100, where 100 equals the highest score (i.e., higher the opportunity). U.S. Travel has not finalized weights; therefore, these rankings are subject to change.



## National Leadership

By appointing a dedicated Travel Minister and strengthening global engagement strategies at both federal and state levels, a nation can enhance its competitiveness, foster innovation, and increase international appeal, aligning itself with leading countries in attracting visitors and supporting sustainable economic growth through travel.



## Brand and Product

Prioritizing stability, resilience, and safety is crucial in shaping a nation's image and rekindling travel interest, especially in light of evolving global travel preferences and persistent safety concerns, making these elements paramount for nations looking to strengthen their travel sectors and facilitate economic recovery.



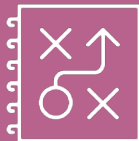
## Identity, Security, Facilitation

Struggling U.S. embassies, burdened by visa processing demands, underscore the need to prioritize facial recognition technology and seek legislative support. Enhancing traveler program awareness and fostering efficient coordination among airports, airlines, and government agencies is imperative for expediting its widespread adoption.



## Travel and Connectivity

Investing in robust domestic connectivity infrastructure enhance the visitor experience, encouraging travelers to explore diverse regions, and ultimately maximizing the economic benefits of travel. Tapping into the burgeoning travel potential of emerging markets like India and China presents a valuable opportunity for top destinations to actively promote themselves and establish direct flight connections.



## National Leadership

Creating a specialized Minister for Travel reinforcing global engagement strategies at both national and regional levels can enhance a nation's competitiveness, innovation, and global allure, aligning it with top-ranking countries in attracting travelers and fostering sustainable economic growth via travel.

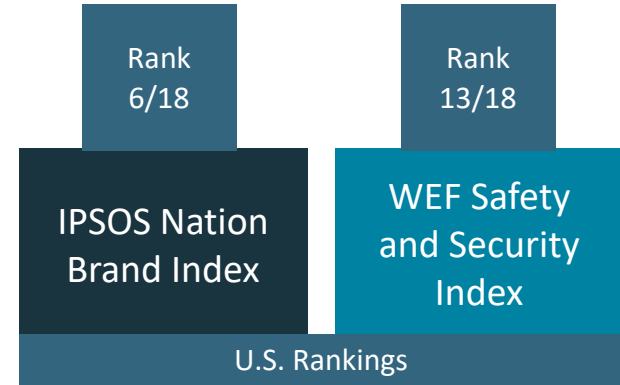


The United States' total ranking of this pillar highlights a deficiency in government leadership and a comparatively weak national travel strategy. However, it stands out among its peers for the significant increase in its Travel Promotion budget from 2019 to 2022.



## Brand and Product

Emphasizing stability, resilience, and safety is paramount for nations seeking to enhance their travel sectors and drive economic recovery, particularly in the context of evolving global travel preferences and ongoing safety concerns. These factors take on even greater significance when promoting the United States as a value destination, as they play a critical role in shaping the nation's image and reigniting travel interest.



The IPSOS Nation Brand Index and the World Economic Forum (WEF) Safety and Security Index are two indices that evaluate nations using several different metrics.

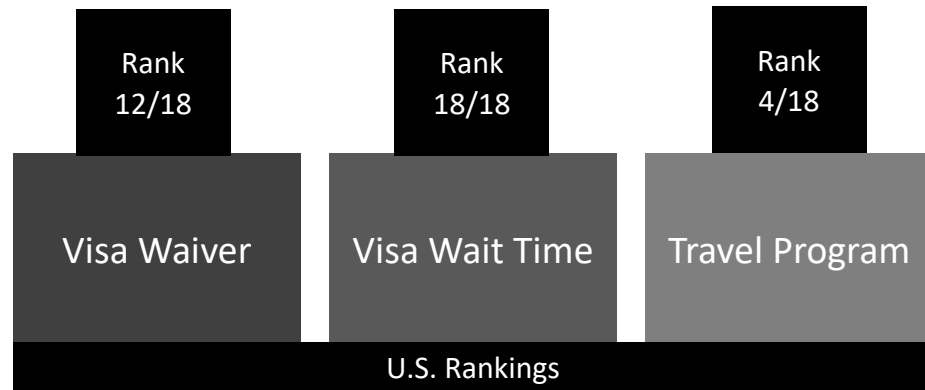
Compared to the peer nations in this report, the U.S. ranks 6 out of 18 while compared to all nations, the U.S. is in 8<sup>th</sup> place, holding steady from 2021 in terms of rank but lower in score. The U.S. remains in the top 10 due to their strengths in Export, not from the other factors like Governance, People, Immigration and Investment.

The U.S. slipped several ranks in the WEF index, alerting how perception of safety in the U.S. may be an issue for potential travelers.



## Identity, Security, and Facilitation

The challenges faced by U.S. embassies, strained by visa processing demands, underscore the need to prioritize facial recognition technology and seek legislative support. Ensuring that these programs are as inclusive as possible and fostering efficient coordination among airports, airlines, and government agencies is imperative for expediting their widespread adoption, ultimately facilitating ease of entrance and exit for travelers.



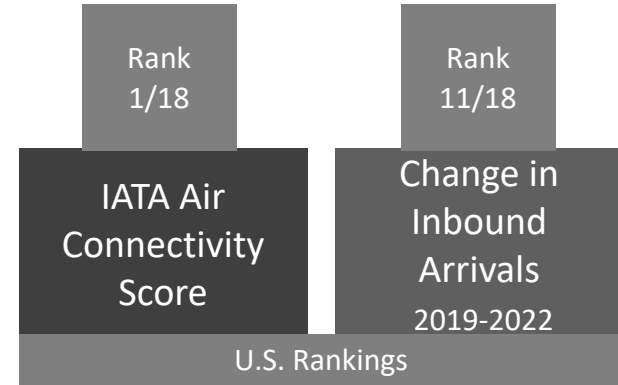
Visa Waivers and Visa Wait Time all place the U.S. as performing below average when compared to its peers in this report. The U.S. ranks in last place, as it takes nearly 100 more days on average to receive a Visa to the US than to Canada, who is in 17<sup>th</sup> place in this metric.

Global Entry is a place of strength for the US, as some other nations do not participate in Traveler Programs.



## Travel and Connectivity

To tap into the burgeoning travel potential of emerging markets like India and China, the U.S. should aim to make travel to, from, and within the country as easy as possible. Investing in robust domestic connectivity infrastructure can significantly enhance the visitor experience, encouraging travelers to explore diverse regions, and ultimately maximizing the economic benefits of travel. This presents a valuable opportunity for the U.S. to actively promote itself and establish direct flight connections as a top destination for international travelers.



While IATA ranks the U.S. as the most Connected Nation in their list, it does not reflect non-aviation forms of connectivity, which is a major challenge. The U.S. underperforms when compared to other nations in other forms of travel, particularly in rail.

When examining inbound arrivals from 2019 and 2022, the U.S. data indicates a slower COVID-19 recovery compared to other countries pushing not only recover to pre-pandemic levels but exceed them.



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# National Leadership

# Scorecard Metrics for Pillar



## Government Leadership

Government Leadership plays a key role in influencing travel. Support may come in the form of centralized and dedicated leadership at the ministerial level. This would typically include the funding and authority to focus on growth objectives, and coordinate across borders and span the public and private sector.



## National Strategy

The evaluation criteria of each market's includes the comprehensiveness, focus, and sustainability of a country's travel strategy. This accounts for each market's response to COVID-19, their level of promotional efforts, financial commitment, and long-term planning.



## Travel Promotion

Monitoring changes in promotional spending is essential for evaluating a country's commitment to travel, its competitiveness, and its ability to respond to various challenges and opportunities in the travel industry. It reflects the government's understanding of the economic impact and its willingness to invest in the sector's growth.

# Government offices demonstrate the wide range of approaches to supporting travel globally

Rank	Country	Office / Level	Travel Government Entity Score	
1	Thailand	Ministry of Tourism and Sports	4.8	<div></div>
2	Brazil	Ministry of Tourism	4.7	<div></div>
3	Greece	Minister for Tourism	4.6	<div></div>
4	Saudi Arabia	Minister of Tourism	4.5	<div></div>
5	Turkey	Ministry of Culture and Tourism	4.4	<div></div>
6	South Africa	Minister of Tourism	4.4	<div></div>
7	Italy	Minister of Tourism	4.2	<div></div>
8	China	Ministry of Culture and Tourism	4.1	<div></div>
9	Canada	Minister of Tourism	3.9	<div></div>
10	Australia	Minister of Trade and Tourism	3.8	<div></div>
11	France	Minister of State for Foreign Trade, Tourism , and French Nationals Abroad	3.7	<div></div>
12	United Arab Emirates	Department of Economy and Tourism (Ministry of Economy)	3.2	<div></div>
13	United Kingdom	Minister of Tourism and Heritage	3	<div></div>
14	Mexico	Ministry of Tourism	2.8	<div></div>
15	Spain	Ministry of Industry, Trade, and Tourism	2.5	<div></div>
16	Germany	Federal Minister for Economic Affairs and Climate action	2.3	<div></div>
17	Singapore	Singapore Tourism Board	1.3	<div></div>
18	USA	Secretary of Commerce	1	<div></div>

Government leadership and involvement in travel management can vary significantly by market. Higher scores were typically associated with scenarios where:

- There is a dedicated minister responsible for travel with the authority to make decisions and implement policies
- Funding is allocated to support travel-related initiatives
- Multiple levels of government are engaged in the travel sector, indicating a coordinated approach.

Lower scores are associated with scenarios where travel responsibilities are decentralized, dispersed across various entities, or the lack dedicated leadership, funding, or authority.

Source: Euromonitor

Description: These metrics measure the presence, budget,

## Effective travel leaders have a clear mandate, dedicated budget, and coordinated approach



Thailand's Ministry of Tourism and Sports was founded in 2003 in accordance with the Act Improving Ministries, Bureaus, and departments. The Ministry manages two authorities, including the Tourism Authority of Thailand Section 29. The Tourism Authority invests heavily in promoting travel in Thailand, measured as a percentage of GDP, and has a vision for Thailand's travel industry. Its objectives include developing stronger relationships with individuals and local businesses to improve travel infrastructure, strengthen relationships with countries that are target markets, increasing travel products and services that attract travelers, and more.

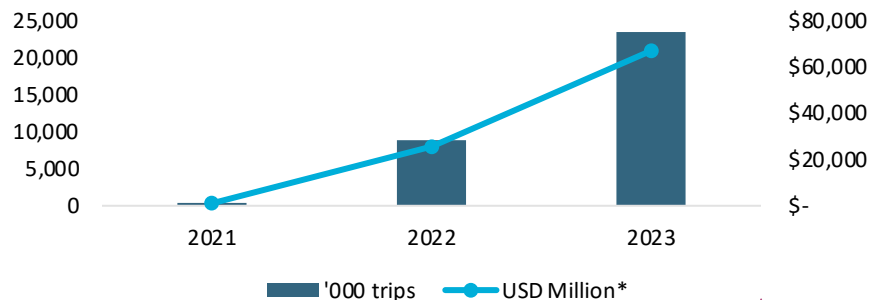


### Decentralized approach to travel in US trails behind other markets

Travel in the United States is highly decentralized. Public authorities manage travel at the national, regional, state, and local levels. These include the federal government, state governments, and destination marketing organizations.

Brand USA is a non-profit corporation that promotes travel to the United States, working with the government to provide insights for international visitors. (OECD)

### Thailand's Inbound Travel Spend



\*USD Million in fixed 2023 exchange rates

## National strategies set long-term visions to recover, develop and sustain inbound travel

Rank	Country	National Strategy	Score	
1	Canada	Federal Tourism Growth Strategy	4.2	
2	United Arab Emirates	UAE Tourism Strategy 2031	4.0	
3	Saudi Arabia	National Tourism Strategy (Vision 2030)	3.8	
4	South Africa	National Tourism Strategy (10-year strategy to 2026)	3.8	
5	China	5-Year Tourism Development Plan	3.6	
6	Turkey	Tourism Masterplan (2022-24); Go Türkiye	3.6	
7	Mexico	PROSECTUR, Sustainable Tourism Strategy 2030	3.6	
8	Greece	Greece 2.0	3.6	
9	Singapore	Quality Tourism	3.4	
10	France	Destination France; Explore France	3.4	
11	Australia	THRIVE 2030	3.0	
12	Thailand	3rd National Tourism Development Plan	3.0	
13	United Kingdom	Tourism Recovery Plan	2.8	
14	Spain	Tourism Sustainability Strategy 2030	2.6	
15	Italy	National Recovery and Resilience Plan (NRRP)	2.4	
16	Germany	National Tourism Strategy	2.4	
17	USA	National Travel and Tourism Strategy (2022)	2.4	
18	Brazil	Tourism Recovery Plan	2.4	

### Scoring Criteria

Scores were assigned based on the depth and detail of the strategic plan, its focus on post-COVID recovery, the presence of promotional elements, and the long-term timeline with clearly defined success metrics. High scoring national strategies had the following elements:

VISION

Long-Term Vision  
Well Defined Strategies  
Concrete Implementation Plans

BUDGET

Adequate Funding  
Comparative Analysis

FORWARD  
LOOKING

Well-Defined Timeline  
Forward-Looking Approach  
Success Metrics

Source: Euromonitor International



# Canada's national strategy prioritizes global visitors and increasing travel revenue

## Federal, private, and regional pushing inbound arrivals

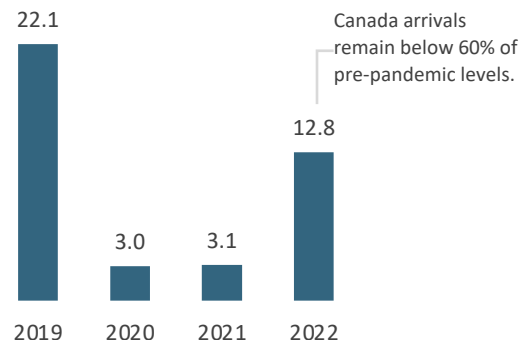
Asian travelers have historically been a key demographic for inbound travel in Canada. In 2019, Chinese travelers accounted for 3.2% of international arrivals. In 2022, that figure has decreased to 0.6% due to China's Zero-Covid policy.

Canada 365 aims to ensure that the benefits of travel are felt by communities across Canada, including increased domestic travel, which may help alleviate lower arrivals of Chinese travelers in 2023 and beyond.

Local strategies are also in place. Vancouver's 2022 investment plan includes investments in Translink, Vancouver's transit system, which is aimed to improve travel infrastructure.

### Canada: Inbound Arrivals

Number of Passenger Arrivals, millions



2023

### Canada 365: Welcoming The World. Every Day

*Federal Tourism Growth Strategy*

The strategy centers on rejuvenating the travel industry through a focus on innovation, sustainability, and inclusivity. Goals include boosting travel spending, improving visitor experiences, and highlighting lesser-known destinations through partnerships with Indigenous communities. The strategy also emphasizes investments to promote more year-round travel.

2022

### Canada's Travel Renaissance

*Destination Canada*

This 3-year corporate strategy is positioned to support the 225,000 small- and medium-sized travel businesses.

2019

### Creating Middle Class Jobs

*Federal Tourism Growth Strategy*

It aims to enhance visitor experiences, support Indigenous travel, promote diverse destinations, invest in innovation, and strengthen industry partnerships. The strategy underscores the importance of collaboration among government, industry, and Indigenous communities to drive economic benefits and preserve Canada's natural and cultural assets.



## Spain turns to quality to drive socio-economic benefits of travel



### Spain targets high spending niche segments for a sustainable, connected future

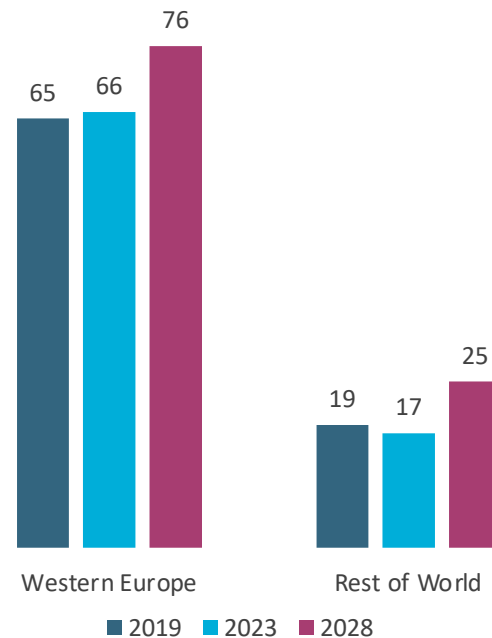
Spain's economy relies heavily on travel, with pre-pandemic 2019 spending of US\$101 billion, expected to rise in 2023 and surpass peak levels by 2024. Their **Sustainable Tourism Strategy 2030 emphasizes sustainability, attracting more diverse markets and expanding travel offerings** – specifically more inland travel.

The goal is to tackle over-tourism, reduce seasonal dependence, and protect natural and cultural assets. Spain is actively seeking high-spending travelers from North Asia, the Middle East, and the Americas. Key source markets like Brazil, South Korea, Mexico, Japan, Singapore, and the UAE won't require short-term visas, but a new ETIAS system will be introduced in 2024.

Spain has a cutting-edge transportation system with high-speed rail, a vast maritime network, and 46 airports. They're investing in Barcelona and Madrid airports in line with the 2025 Flight Plan. Spain also participates in the Single European Sky/SESAR initiative to modernize air traffic management and align with the EU's Green Deal for aviation.

### Spain Arrivals by Region

Trips, million



## Turkey's investment in travel promotion pays off with 2022 inbound arrivals close to pre-COVID levels



Rank	Country	Change in Travel Promotion Score	
1	Brazil	182.8%	
2	USA	150.0%	
3	Turkey	150.0%	
4	Greece	22.7%	
5	South Africa	17.0%	
6	Thailand	9.9%	
7	France	-11.3	
8	Italy	-16.4%	
9	Australia	-18.6%	
10	Canada	-22.9%	
11	United Kingdom	-61.4%	
12	Singapore	-83.8%	
13	Germany	-88.3%	
14	Mexico	-96.5%	
15	Spain	-99.4%	
16	China	N/A	
17	Saudi Arabia	N/A	
18	UAE	N/A	

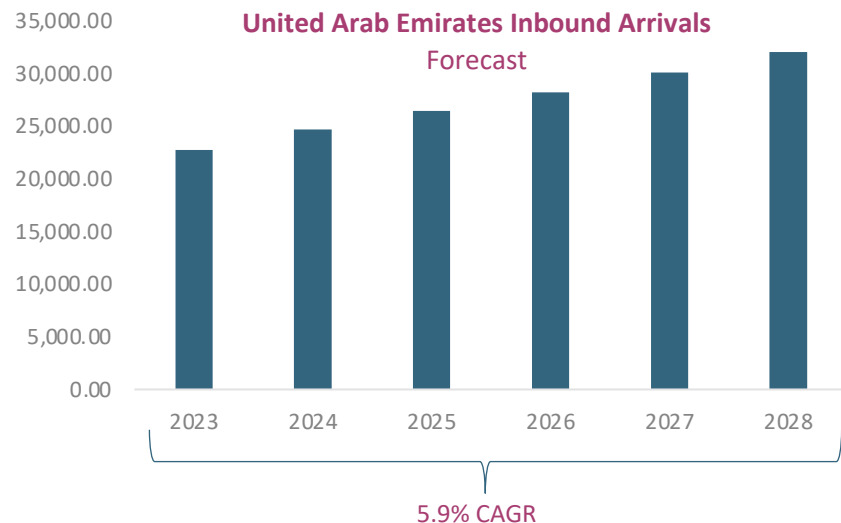
Source: Euromonitor International

### Turkey Creates National Tourism Promotion Agency

The Turkey Promotion and Development Agency was founded in 2019 under the Ministry of Culture and Tourism to brand Turkey as a popular destination, both in its culture and natural endowments, to increase travel. The Agency increased its promotion during Covid-19, to include destination promotions, advertisement of Turkey's cuisine through partnerships with popular chefs and culinary influencers, and information on Turkey's re-opened venues after Covid lockdowns. It also created the *All in Turkey* training platform to educate travel professionals in Turkey on topics related to the industry. In 2022, arrivals to Turkey reached 51.4 million, 0.4 fewer than in 2019, indicating that Turkey is close to recovering from the Covid-19 pandemic.

**The country intends to reach 90 million visits per year and \$100 million in travel by 2028.** Turkey plans to reach this goal through increased investment in travel promotion and creating a sustainable travel ecosystem.

# The UAE's vision for travel extends to 2031 and involves substantial investments to drive the industry



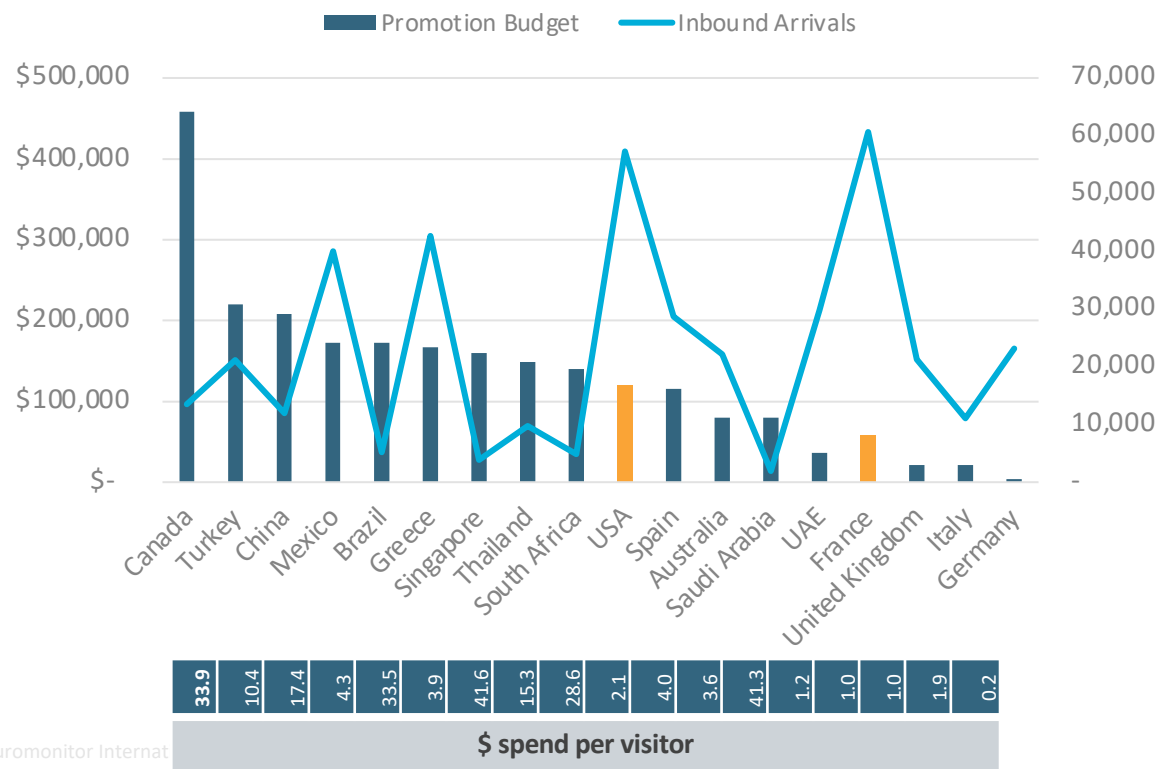
## Government Leadership in the UAE drives investment in travel with budget increases and robust travel strategies

The UAE has set two significant goals for 2031. First, it aims to attract 40 million hotel guests, signifying a substantial boost in travel. **Second, the country is targeting new investments totaling \$277.2 billion to bolster its travel sector.** These investments are part of a broader regional strategy aimed at diversifying economies away from oil dependency, preparing for potential energy crises, and enhancing economic resilience.

The UAE, equipped with a leading travel infrastructure and bolstered connectivity, stands to reap substantial benefits from increased visitor arrivals. It's worth noting that while the Department of Economy and Tourism oversees the UAE's travel efforts, each of the seven constituent monarchies maintains its own travel departments, which play a crucial role in decision-making within their respective regions.

## France is seeing a strong 'return-on-investment' as its average promotional dollar spend per visitor ranks third lowest

Promotional Investment vs. Inbound Arrivals



### Despite spending around \$1 on promotions per visitor, France records the highest level of inbound arrivals

France is ahead of the USA, which spends over double the amount per visitor. With Paris retaining its 1st position in the Euromonitor Cities Index, the French government's 'Destination France' plan, aimed at the recovery, transformation and sustainable development of the pandemic-hit travel sector appears to be effective.

Accompanying strong investment in luxury hotels in Paris (e.g., Hotel Madame Réve) offer opportunities to cater to sporting events like the Rugby World Cup 2023 and Olympics 2024.



## Thailand

Tourist Government Entity: 1 out of 18

The ministry, established in 2003, is in charge of managing the travel industry and sports both in schools and other institutions. Two agencies manage Thai travelers: The Tourism Authority of Thailand (TAT), is responsible for "bodycount", i.e., attracting visitors. The Department of Tourism in the Sports and Tourism Ministry regulates the industry and manages infrastructure.



## United Arab Emirates

National Strategy Rank 2 out of 18

The UAE has set two significant goals for 2031: attracting 40 million hotel guests to boost travel and targeting \$277.2 billion in new investments to enhance its travel sector as part of a broader regional strategy to diversify away from oil dependency, prepare for potential energy crises, and bolster economic resilience.



## Turkey

Promotions Budget +150% vs 2019

"We had a promotion budget of \$18 million in 2018. This year, we increased it to \$180 million. As the travel sector grows bigger, the share of the Tourism Promotion and Development Agency (TGA) will increase. We will be conducting more advertising works and bringing in more tourists," Mehmet Nuri Ersoy told daily Hürriyet in the TGA's office in Istanbul.



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# Brand and Product



### Anholt-Ipsos National Brand Index

The NBI survey is conducted in 20 major advanced and emerging economies that play important and diverse roles in international relations and trade, as well as in the flow of business, culture, and traveler activities.

Respondents rate a country's travel appeal in three major areas: Natural beauty, historic buildings and monuments, and vibrancy of urban life and attractions. Travel potential is also rated: How likely a respondent would be to visit a country if money were not an object, and whether the likely experience would be represented by adjectives such as romantic, stressful or spiritual.

### World Economic Forum Safety and Security Pillar

World Economic Forum, Safety and Security Pillar measures the extent to which a country exposes locals, travelers and businesses to security risk. It is a crucial component of its annual Travel and

Tourism Competitiveness Index (TTCI). This pillar assesses a country's safety and security conditions, which are paramount in influencing travelers' perceptions and decisions. It encompasses various factors such as the prevalence of violence and crime, the reliability of law enforcement, the occurrence of terrorism, and the overall safety environment. The Safety and Security Pillar provides valuable insights into a nation's ability to protect its residents, visitors, and businesses, which, in turn, profoundly impact its competitiveness in the global travel industry.

## Anholt-Ipsos Nation Brands Index IPSOS Brand Index reveals the power of strong, stable brand perception

Rank	Country	Score
1	Germany	69.8
2	Canada	69.5
3	Italy	69.3
4	France	69.2
5	United Kingdom	69.1
6	USA	68.3
7	Australia	67.9
8	Spain	67.3
9	Greece	62.9
10	Singapore	60.9
11	Brazil	59.3
12	Mexico	57.5
13	China	57.4
14	Thailand	57.0
15	Turkey	56.6
16	South Africa	55.2
17	United Arab Emirates	54.1
18	Saudi Arabia	51.1

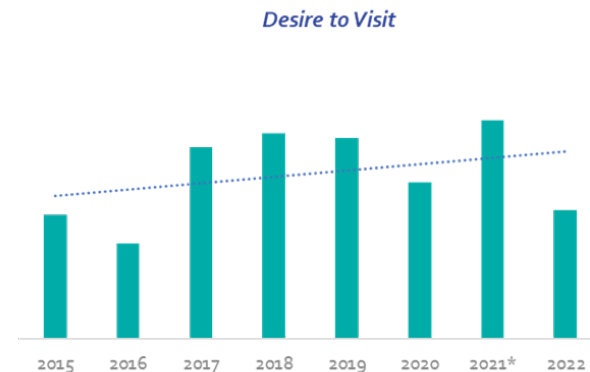
Source: IPSOS

### Germany Achieves Top Ranking on the Nation Brands Index for the Eighth Time, Sixth Consecutive Year

This extends Germany's record-breaking streak as the highest-ranked NBI nation, surpassing the United States. Germany's strong reputation is attributed to its excellence in areas such as Exports, Immigration & Investment, and Culture. In 2022, especially positive sentiments are observed in areas like the perception of German products, the employability of its citizens, the allure of German sports, and the attractiveness of investing in German businesses, all of which rank among the top two in the index.

### Desire to Travel has Decreased across all Nations

IPSOS conducted a longitudinal analysis of all NBI countries from 2015 to 2022, which revealed how the desire to travel has fluctuated over the years. In 2022 there was a decrease in desire to travel, bringing it to the lowest it's been since 2016. According to Ipsos, of the 58 NBI nations in both 2021 and 2022, most nations observe a decrease in desire to travel.



Source: <https://www.ipsos.com/en/nation-brands-index-2022>

## Safety and Security are a key influence on travel perceptions, as demonstrated by top ranking Singapore

Rank	Country	2019	2021	Change vs 2019
1	Singapore	6.7	6.8	0.1
2	United Arab Emirates	6.5	6.5	NC
3	Spain	6	6	NC
4	Australia	5.8	5.9	0.1
5	China	5.5	5.8	0.3
6	Saudi Arabia	5.7	5.8	0.1
7	Canada	5.9	5.6	-0.3
8	France	5.5	5.6	0.1
9	Germany	5.5	5.6	0.1
10	United Kingdom	5.6	5.6	NC
11	Italy	5.4	5.5	0.1
12	Greece	5.2	5.4	0.2
13	USA	5.3	5.4	0.1
14	Thailand	4.8	4.8	NC
15	Turkey	4.4	4.8	0.4
16	Brazil	3.6	3.9	0.3
17	South Africa	3.4	3.5	0.1
18	Mexico	3.2	2.4	-0.8

Source: Euromonitor, World Economic Forum

Description: These metrics measure the extent to which a country exposes locals, travelers and businesses to security risks.

### Singapore ranks the safest destination in WEF's Travel and Tourism Development Index

Singapore's rank of 11<sup>th</sup> in WEF's Travel & Tourism Competitiveness Index is driven by their high scoring in safety and security. Singapore is the top ranked country in terms of safety and security and is exceptionally safe for travelers due to its low crime rate and efficient and reliable police services. With a low homicide rate, favorable Global Terrorism Index (0.0/10), and minimal organized violence, the country offers a secure environment. Its strict laws, including severe penalties for crime and drug offenses, contribute to maintaining safety and a peaceful atmosphere for residents and visitors alike. Singapore outranks the US in all the WEF's safety and security metrics.

Indicator	Score	Rank/117
<b>Safety and Security (1-7 best)</b>	<b>6.8</b>	<b>1</b>
Business costs of crime and violence (1-7 best)	6.2	2
Reliability of police services (1-7 best)	6.6	2
Safety walking alone at night (0-1 best)	6.8	1
Homicide cases per 100,000 pop	7.0	1
Global Terrorism Index (0-10 worst)	7.0	1
Organized violence, deaths per 100,000 pop	7.0	1

# US slips four places in WEF Safety and Security Ranking from 2019 to 2021



## United States Performance Details: Safety and Security 2021

Indicator	Rank 2021	Change	Rank 2019
<b>Safety and Security</b>	<b>68</b>	<b>↓</b>	<b>64</b>
Business costs of crime and violence	69	↓	43
Reliability of police services	21	↓	19
Safety walking alone at	32	↑	41
Homicide cases per 100,000 pop	83	↑	85
Global Terrorism Index	99	↑	103
Organized violence, deaths per 100,000 pop	69	↑	78

World Economic Forum: <https://www.weforum.org/reports/travel-and-tourism-development-index-2021/explore-the-data>

## Business costs of crime and violence and reliability of police services impact US Safety Score

The WEF Safety and Security pillar, comprising six indicators, plays a pivotal role in shaping a country's overall travel performance. This metric assesses a nation's ability to mitigate security risks for its residents, travelers, and businesses. High levels of crime or violence can discourage travel.

The US shifted from 64<sup>th</sup> place in 2019 to 68<sup>th</sup> in 2021, driven down by lower scores in the business cost of crime and violence and reliability of police services. While homicides have decreased by 2 points since 2019, the fear of gun violence remains highly influential in global perceptions of the US. Many other countries have travel advisories related to gun violence.

## United States travel advice issued by the Government of Canada

### Gun violence

The rate of firearm possession in the US is high. It's legal in many states for US citizens to openly carry firearms in public.

Incidences of mass shootings occur, resulting most often in casualties. Although tourists are rarely involved, there is a risk of being in the wrong place at the wrong time.

Familiarize yourself on how to respond to an active shooter situation.

"American gun laws are huge worry to visitors, especially Europeans. We hear about mass shootings all the time and some people are scared by it. I don't know if it would impact everyone's travel plans, but it certainly would impact some."

-European Aviation Safety Association



## Canada

3<sup>rd</sup> in NBI and 13<sup>th</sup> in WEF Safety and Security

Canada is often perceived as a safe and secure country, which is a highly appealing attribute for international travelers. Its low crime rates and political stability contribute to this positive reputation. Travelers are also drawn to Canada's natural landscapes, high quality of life, well-developed infrastructure, and positive international relations. Canada's commitment to environmental conservation, cultural offerings, and outdoor activities make it an attractive destination for travelers.



## Australia

10<sup>th</sup> in NBI and 7<sup>th</sup> in WEF Safety and Security

Australia sits in the top 5 in the WEF Safety and Security Pillar and the top 10 in the NBI, competing with the US in both metrics. Australia may be considered safer than the US for travel due to its lower crime rates and strict gun control (0.9 homicides per 100,000 pop). Travelers to Australia also face a relatively low terrorism risk (2.1/10 on the Global Terrorism Index). Australia outscores the US on every safety and security metric, except safety walking alone at night.



## UK

Dropped from 5<sup>th</sup> to 6<sup>th</sup> in NBI

In a first for the NBI, the United Kingdom has slipped out of the top five. While the UK enjoys a positive reputation in areas like Culture, Exports, and Immigration and Investment, it faces challenges in the People and Governance indices, where assessments of its people's welcoming nature and government's competence and honesty are less favorable. This emphasizes the importance of stability in a nation's overall brand perception.

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# Identity, Security, and Facilitation



# Scorecard Metrics for Pillar



## Visa Waiver

These are agreements between countries allowing citizens to enter without visas, often based on diplomacy and reciprocity, promoting travel and business. Examples include Europe's Schengen Area and the US Visa Waiver Program.



## Visa Wait Time

This refers to the time it takes to get a visa after applying, this is commonly influenced by processing capacity, application volume, complexity, and visa category.



## Traveler Program

These programs offer expedited security and immigration clearance for pre-screened travelers. Enrollment can significantly streamline international travel, providing a convenient and efficient experience for participants while maintaining security.

*Note: under 'Identity, Security and Facilitation' pillar, we assessed 2 additional metrics: (i) Customs Wait Time {Number of minutes it took to clear customs screening (based on Skytrax reviews/ratings)}, and (ii) Biometric Capabilities {% of international airports in a country equipped with biometric technology for passenger screening}. Both were however not incorporated into the scorecard as they either were not lent to meaningful quantitative scoring, or country performances were not differentiated enough to make a reflective impact on scoring. So, we provide qualitative-backed analyses on both metrics on slides 39 and 41, respectively.*

## Visa Waiver Scorecard Rankings: USA falls behind Europe and Latin America in visa waiver policies

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	
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	

Source: Euromonitor



### UK leads with long waiver list and simple processes

The UK's visa waiver policy leverages electronic visa waivers (EVWs) for eligible nationals at a cost of £30, streamlining the application process and providing a downloadable link within 24 hours.

Travelers can present the EVW digitally on their devices when visiting the UK and conveniently update travel details electronically if plans change.



### Brazil leverages liberal visa policy to drive

Brazil's travel visa policy now allows citizens from 68 countries to visit visa-free for a specified duration. For countries that do need a visa, no interview or other in-person activities are required.

This liberal policy fosters a welcoming environment for international travelers, promoting cultural exchange and boosting the country's travel industry.

# Visa waiver policies hold immense influence on international travel and global connectivity



## Visa waiver policies play a vital role boosting travel and trade

By simplifying entry procedures, reducing barriers and making travel more accessible - visa waivers attract travelers, investors, students and business, stimulating local economies.

Moreover, they promote cultural exchange, fostering mutual understanding between nations. Visa waivers also facilitate international cooperation by enabling easier participation in conferences, educational programs, and global events. Overall, these policies enhance mobility, collaboration, and economic growth, making them a cornerstone of modern global relations.

## New policies in the United Kingdom rolling out by end-2024

The UK will mandate Electronic Travel Authorization (ETA) for visa-exempt travelers, including EU, US, and other nationals. Applications will be processed online, with biometric passport scans including 'dynamic selfies.' Approved ETAs will be valid for multiple visits over two years.

It's a significant shift, requiring pre-approval for many travelers, while those with ETA can still use e-passport gates. The UK anticipates handling 30 million ETA applications annually and may explore fingerprint biometrics submission via smartphones in the future.

## The US VWP lags Europe and neighboring countries

While subject to certain restrictions, the US Visa Waiver Program (VWP), continues to play a significant role in promoting travel and business travel to the United States. The program is designed to balance travel facilitation and national security. Any changes or perceived limitations in the program reflect the evolving priorities and policies of the larger US government.

*"We do view the expansion of the VWP as something that should be encouraged because it is a strong security and facilitation tool. However, there are countries who choose not to meet their requirements of because they or their populations overstay at rates that don't meet U.S. law." -Pangiam*

## Visa Wait Time Scorecard Rankings: The US and Canada remain behind other global destinations, making it more difficult to compete

Rank	Country	# of Days	
1	Australia	1	
2	Turkey	1	
3	Saudi Arabia	1.5	
4	United Arab Emirates	3.5	
5	China	4	
6	Singapore	4	
7	Thailand	4	
8	Brazil	7.5	
9	Mexico	8.5	
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	175+	

Source: Euromonitor



### Australia

Since 2015, all Australia visas are electronic and linked to passport details. Nearly all Australian visas can be applied for online. While there are some visa waiver agreements – travelers are still required to obtain a visa through a streamlined online process.

Depending on the travelers subclass – applications can be accomplished via travel agents, airlines or other third-party services. Many applications can be granted within minutes.

“Australia is super good at implementing visas at the moment. It’s easier to get people into Australia now than Europe. A tour operator will say, why don’t I just sell that one?”

– European Tourism Association (ETOA)

## Harmonized visa applications in Schengen countries to simplify travel

Country	Interview Required
Singapore	No
Australia	No
Canada	No
United Arab Emirates	No
Saudi Arabia	No
Mexico	No
Brazil	No
Thailand	No
South Africa	No
China	Varies
Italy	Yes
Germany	Yes
Turkey	Yes
France	Yes
Spain	Yes
USA	Yes
United Kingdom	Yes
Greece	Yes



### Schengen countries have harmonized visa application procedures, making it easier for travelers considering a visit to Europe

- Visa Simplification: A single Schengen visa allows entry into any participating country, eliminating the need for multiple visas
- Streamlined Application Process: Travelers can submit applications at any Schengen country's embassy or consulate, regardless of destination
- Online applications: Efficient processing systems reduce waiting times

“The system is changing to make it easier for the Olympic games in Paris next year. ESTA system will be affordable, easy, one-stop shop; a fully automated system that is very affordable to get a visa for group of countries if you are coming from certain countries, will be adopted later, currently planned after Olympics.”

-European Travel Association Interview

Additional Reading: 2022 Visa Processing Survey 2022 [[Link](#)]

Source: Euromonitor



## UAE's multi-entry traveler visa sparks inbound travel rebound following pandemic

### Increased visa waivers and streamlined visa requirements driving inbound traffic

Multi-entry traveler visas were added as an option for travelers in 2022, allowing visitors **to stay up to 90 days per visit** for select countries, good for five years in total, with a limit of 180 days per year. Previously, travelers visas were limited to 30- or 60-day stays. **This type of traveler visa can be issued for all nationalities.** [\[Link\]](#)

The application requires personal photo, copy of passport data page, and a 6-month bank statement with a minimum balance of US\$4,000. **Applications can be made online.**

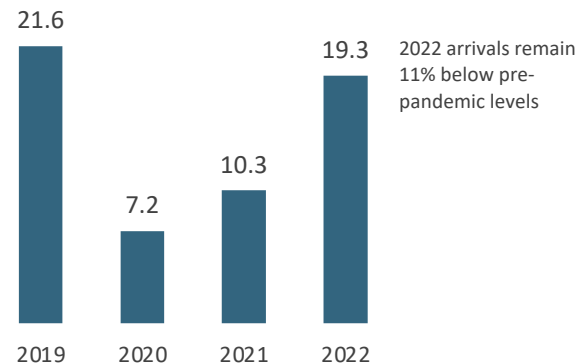
Visit visas were also reimaged in 2022. The long-term visa allows for **a stay of up to 60 days instead of the previous 30 days**, which is now considered a short-term stay.

UAE's flexibility in visa policies allowed for The Federal Authorities for Identity, Citizenship, Customs and Ports Security to pivot quickly for global travel demands post COVID-19. The shift in 2022 for simpler visa process likely contributed to 70% growth between 2021 and 2022.

The UAE has been able to handle this growth in travel without increasing the waiting period for visa approval, in part due to the **60% penetration rate of biometrics** in international airports and **the implementation of technology like Smart Tunnel that can expedite entry processes.**

### UAE: Inbound Arrivals

Number of Passenger Arrivals, millions



### 82 countries now carry visa waivers

As of August 2023, the Ministry of Foreign Affairs encourages all interested in visiting the UAE to check their new visa policies as they have doubled the number of countries allowed to enter Visa Free.

## Traveler programs are pivotal for promoting international travel

Country	Traveler Program
Singapore	Frequent Traveler Programme
Australia	Smart Gate
Mexico	Viajero Confiable
Canada	NEXUS Program
USA	Global Entry
Germany	Easy Pass
Turkey	Fast Pass System
United Kingdom	Registered Traveler

### UK Registered Traveler Program

The UK Registered Travel service allows faster access through UK border and is available in some airports and train stations. To be eligible, a traveler must be an adult, have a UK visa or entry clearance, have visited the UK at least 4 times in the last 24 months and have an eligible passport from a participating nation. Registered Traveler service was revoked for Australia, Canada, Japan, New Zealand, Singapore, South Korea and the United States, which account for 16.2% of traveler inbound arrivals together. Instead, ePassport gates can be used.

### Traveler programs carry economic benefits in addition to safety and convenience

These programs contribute to global competitiveness, making countries more attractive destinations for international visitors and business travelers alike.



**Canada NEXUS:** The program, adopted in 2002, expedites border clearance between Canada and the United States, benefiting pre-screened travelers for efficient cross-border journeys.



**Australia and New Zealand SmartGates:** Launched in 2007, these self-serve kiosks (found in ten Australian airports and four new Zealand airports) process travelers using facial scanning to verify one's identity against an e-Passport.

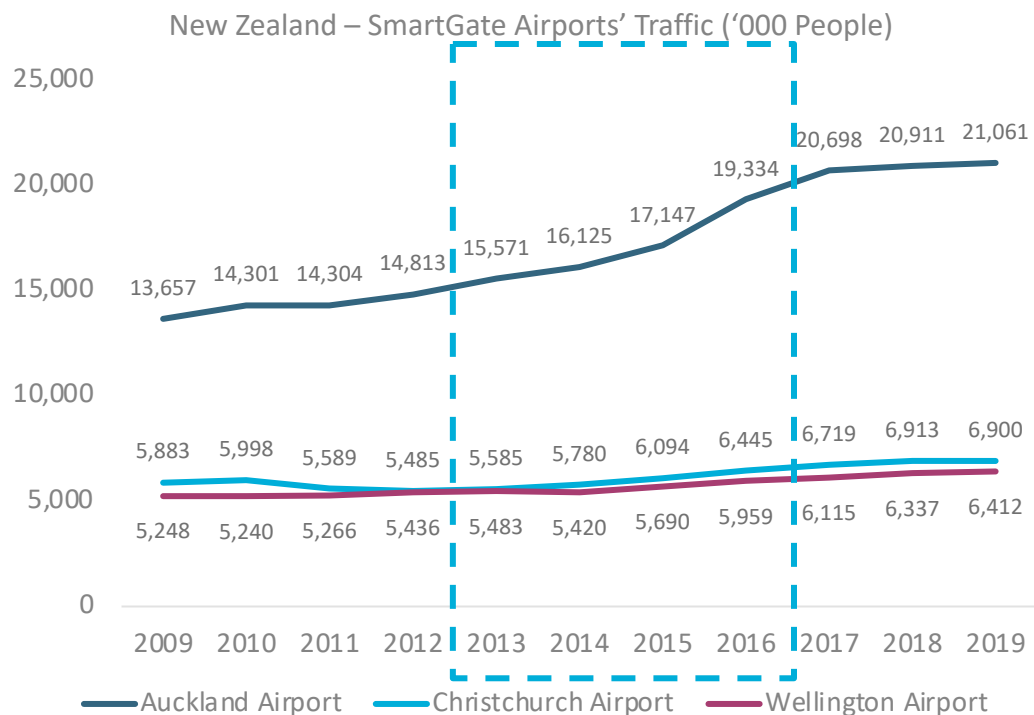


**US Global Entry:** Deployed in 2008, the program leverages fingerprints and facial recognition for low-risk travelers to get expedited screening. Currently, 16 countries are eligible to join.



**Germany EASYPASS:** Introduced in 2018, the program streamlines border clearance for eligible non-Schengen travelers, enhancing efficiency for pre-screened biometrics.

## With the capacity to process each traveler in 24 seconds, New Zealand's SmartGate system saw increased usage after being extended to other countries from 2013/2014



Source: Euromonitor International Passport

### Political Backing and Sport Travel Returns as Drivers

Prime Ministers of Australia and New Zealand (NZ) agreed to allow seamless movement between their countries. This was also spurred by 2011 Rugby hosting rights awarded to NZ. The **political/organizational priority (including from Customs)**, and close ties between NZ Customs and Australian Customs and Border Protection Service (ACBPS) allowed testing in NZ and early integration with NZ's CusMod System.

### Phased Roll-out Allowed Testing and Efficient Scaling

- **March 2009: Cabinet endorsed Customs SmartGate.**
- **December 2009:** First SmartGate started in Auckland.
- **August 2011:** SmartGate fully operational in Auckland, Wellington and Christchurch Airports.
- **May 2012:** Customs using 22 gates and 54 kiosks continuously.
- **Scaled to other countries (USA, UK, Singapore etc. from 2013/14), and younger ages (12+ years with ePassport).**

### Increasing returns as queues and waiting times reduced

- Within Year 1, 500,000+ passengers used SmartGate; 1+ Mn by April 2011, 2 Mn by December 2011 and 3 Mn by May 2012 when it was fully integrated with NZ's CusMod.
- By 2012, **60+% of eligible travelers were choosing to use SmartGates.**
- **Average of 16 minutes from aircraft arrival to clearing at SmartGate, vs. 20 minutes for non-SmartGate passengers.**



# Singapore's Frequent Traveler Programme is designed to expedite immigration clearance for eligible travelers

## How It Works:

- Eligible travelers use automated lanes at passport control.
- They scan their passport, fingerprint, and/or iris at the kiosk.
- The system matches the traveler's biometric data with the information stored in the ICA database, verifying their identity.



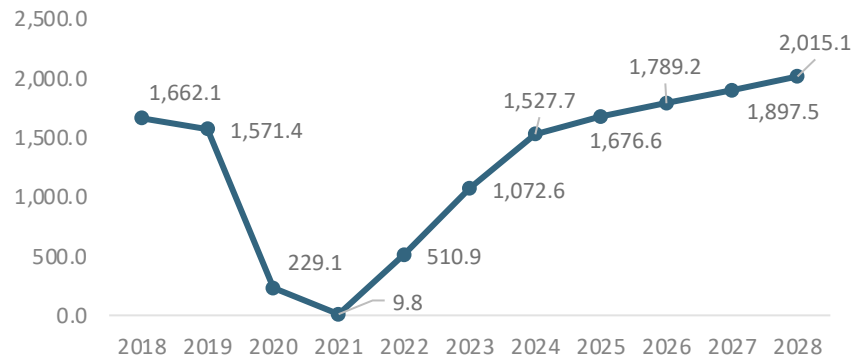
## Benefits:

- **Reduced Wait Times:** Significantly reduces wait times at passport control, making the entry process faster and more efficient. Processing time is approximately 10 minutes.
- **Enhanced Security:** The use of biometric technology enhances security by verifying travelers' identities.
- **Convenience:** Eligible travelers can bypass long queues and complete the entry process swiftly.

## Impact on Business Travel:

- By simplifying the entry process, Singapore aims to attract business travelers, who appreciate the efficiency of the system when visiting for meetings, conferences, and trade-related activities.
- The program was extended to include travelers with certain employment passes/work permits in April of 2018. Currently, travelers are eligible with
- While the pandemic disrupted travel significantly, business air arrivals have begun to recover, and are forecasted to grow at a CAGR of 13% through 2028, surpassing pre-pandemic trips.

Singapore Business Air Arrivals  
Number of Trips (000 trips)





## UK Airport Security rule change paves the way for others to follow

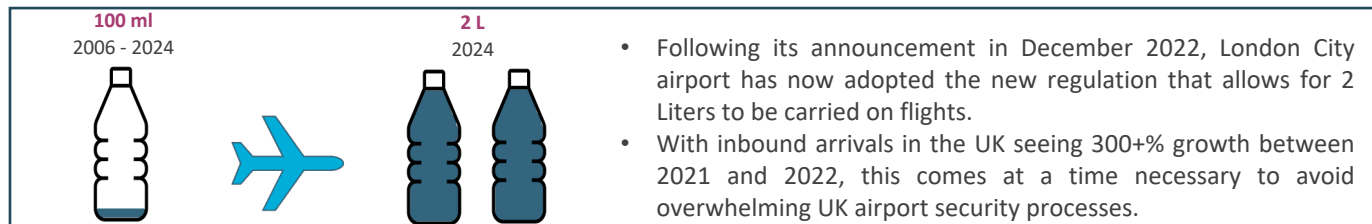
The London-based terrorist threat in 2006 changed the way that airports, globally, dealt with liquids as it restricted aircraft passenger carry-on volumes of liquids, gels and aerosols. The UK is exploring technology that will eliminate this restriction. With a deadline of June 2024, all airports in the UK are expected to adopt new screening equipment. CT X-ray technology\* will be able to provide a 3D scan of passengers' bags. Paired with advanced threat detection algorithms, this shift is expected to reduce security check-in/wait times by aiding faster-moving queues, improve travelers' airport experiences, cut staff costs, and allow security staff focus on monitoring passenger behavior.

*"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 travelling."*

– Mark Harper, UK Transport Secretary\*\*

### CT Tech to be implemented in other countries

- 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](#),

## United Kingdom

**CT Technology for threat detection in all UK airports by 2024 will expedite the traveler experience**

## Customs Wait Time Scores driven by staff shortages, passenger loads and complex procedures

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	
10	United Arab Emirates	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	



### Skytrax sets the standard for airlines and airports

Skytrax World Airport Star Ratings were introduced 20 years ago and has become a global benchmark of quality evaluation for the airport industry across consumer-facing products and services.

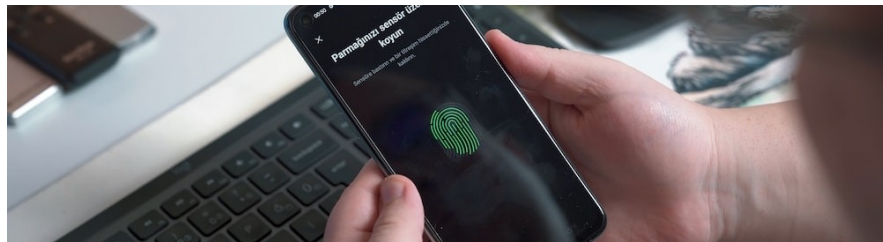
### China leads the 2023 Skytrax Airport Rankings

China is the only country able to claim three 5-star Hub Airports among the Skytrax airport rankings between Hong Kong, Shanghai and Shenzhen Bao'an. These airports, on average, have much more efficient customs waiting times when compared to other in-scope countries.

China invested in improving safety and security along with efficiency measures particularly through biometric measures digitizing the customs process.

Source: Skytrax; 5 reflects the most efficient customs process ; 1 reflects the least efficient customs process

## Biometric Passports (ePassports) are redefining security protocols and becoming the norm



### Introducing biometric passports or digital, ePassports

Also known as digital identity or electronic passports, Digital Passports are emerging as a significant technological advancement. The first such example was issued by Malaysia in 1998, featuring a microchip embedded in the document's cover.

These microchips store essential biometric information like digital photographs used for facial recognition. Many countries are now expanding to include fingerprints, making it even harder to counterfeit or tamper with passport data.

Today, ePassports are rapidly becoming the norm in many countries simultaneously improving border security and expediting customs processes international travel.

### International standards for ePassports being adopted in United States

Following the 9/11 Commission Report, the Enhanced Border Security and Visa Entry Reform Act of 2002, foreign travelers can use smart-card identity cards in lieu of visas. It mandates that foreigners visiting the US under the Visa Waiver Program (VWP) must have machine-readable passports (MRP).

US passports now contain an electronic chip on the back cover storing the holder's photo, passport data, and personal information. While there is potential to store fingerprints and iris scans, testing by the United States Customs and Border Protection (CBP) has focused on improving facial recognition.

### Biometric passports now standard, ETIAS launching in 2024

All EU countries (excl Ireland and Denmark) require biometric passports as standard issue to all citizens. All passports in the EU now contain digital imaging and fingerprint scan biometrics.

Announced in 2016, the long-awaited European Travel Information Authorization System (ETIAS) will be necessary for visitors from third countries with a visa waiver agreement to before arriving in an EU Schengen country next year.

## Biometric Capabilities (2023): China leads with 74 airports outfitted with biometric screening

Rank	Country	Airports w/Biometrics	% of Int'l Airports	
1	Thailand	16	100%	
2	China	74	86%	
3	Canada	10	71%	
4	South Africa	4	67%	
5	United Kingdom	13	62%	
6	United Arab Emirates	3	60%	
7	Australia	9	56%	
8	Singapore	1	50%	
9	Germany	8	44%	
10	USA	44	36%	
11	France	7	21%	
12	Brazil	6	19%	
13	Spain	5	15%	
14	Italy	3	10%	
15	Mexico	3	8%	
16	Saudi Arabia	1	7%	
17	Turkey	1	5%	
18	Greece	1	5%	

Source: Euromonitor



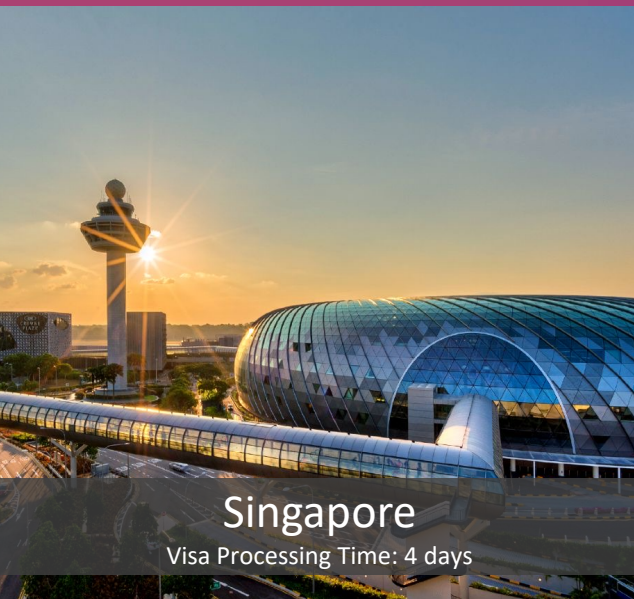
### Tech advancements can revolutionize the customs process

Since 2020, Dubai International Airport and Abu Dhabi International Airport offered contactless journeys by matching biometric data with existing passport and flight details. Passengers can pass through e-boarding gates without a boarding pass after registering with Smart Tunnel using an iris scan to ID passengers.

In the U.S., only 36% of international airports have biometric capabilities, further underscoring the varying nature of American airports.

“The way we view airports in the U.S. is, if you’ve seen one airport, you’ve seen one airport. They are all quite different in their layout and their infrastructure. And that’s particularly the case on the regulatory side. Who owns and overseas airports is complex and varies” – Pangiam



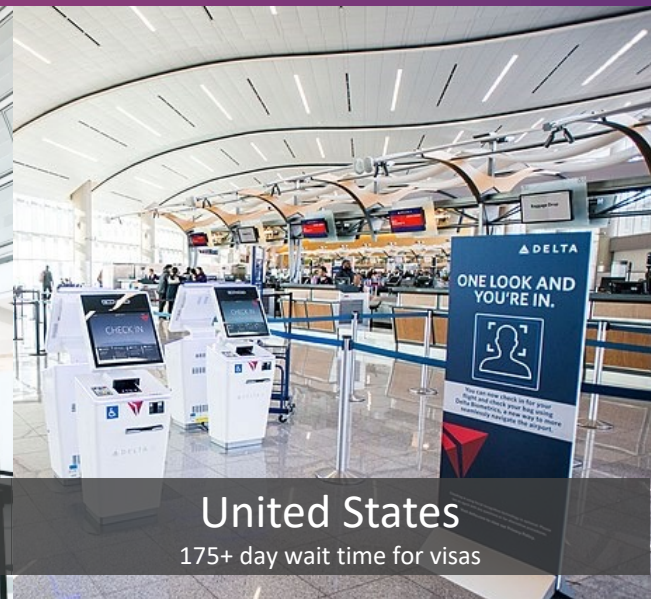


Similar to Australia – Singapore grants few visa waivers but does maintain a quick four-day turnaround for visas and does not require interviews.

Additionally – The city-state's Changi Airport reclaimed the title of “[World's Best Airport](#)” announced earlier this year by the air transport research firm Skytrax.



Customs and immigration declarations can be done in advance via the [ArriveCAN app](#) before flying into Canada. Launched in 2022 – travelers can clear customs without leaving security with bags automatically transferred to connecting flights. Kiosks are also available for declarations with custom officers typically clearing passengers in less than 10 minutes at Toronto Pearson.



The Hartsfield-Jackson Atlanta Airport has tested facial recognition and contactless security since 2021.

Today, testing has since expanded to 16 additional airports with more planned before the end of the year. However, long wait times for visas remain an issue further upstream.

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# Travel and Connectivity

## IATA Connectivity Index Rank

IATA Connectivity Index Rank: The International Air Transport Association (IATA) publishes these rankings to assess the level of connectivity of a country within the global or regional air transportation network. It accounts for both the scheduled passenger capacity and the economic significance of the destinations served by an air transport hub.

It is invaluable for policy makers, as it helps them make informed decisions regarding infrastructure development, economic growth strategies, and international cooperation across the airline travel industry. By understanding and improving their connectivity, regions and countries can position themselves for greater economic success and global influence across travel.

Link: [IATA Quarter Air Travel Chartbook](#)

## Inbound Arrivals

Measure a location's accessibility and global connections. Inbound arrivals are vital for international commerce, facilitating business travel, cargo transportation, and travel. Inbound flight networks boost trade, travel, and economic activity.

Taken for the years 2019 and 2022, the Inbound Flights metric is meant to broadly capture a nation's post-Covid travel recovery rate post through the number of international arrivals.



## IATA International Connectivity Score Rankings (2022) show major drops across markets

Country	Score (2022)	Growth vs 2019	Rank (2019)	Rank (2022)	Change vs 2019
USA	41,581,617	<b>-25%</b>	1	1	NC
United Kingdom	30,661,411	<b>-27%</b>	3	2	▲ 1
Germany	25,096,867	<b>-31%</b>	4	3	▲ 1
Spain	24,355,319	<b>-15%</b>	6	4	▲ 2
Italy	19,217,163	<b>-25%</b>	7	5	▲ 2
France	18,523,275	<b>-23%</b>	9	6	▲ 3
United Arab Emirates	16,677,454	<b>-25%</b>	10	7	▲ 3
Mexico	14,557,109	11%	19	9	▲ 10
Turkey	13,689,158	0%	18	10	▲ 8
Canada	12,374,830	<b>-30%</b>	15	11	▲ 4
Saudi Arabia	9,343,537	<b>-7%</b>	27	13	▲ 14
Singapore	9,018,972	<b>-51%</b>	14	14	NC
Thailand	7,947,586	<b>-68%</b>	8	17	▼ 9
Greece	7,608,231	6%	31	19	▲ 12
Australia	5,874,971	<b>-53%</b>	22	23	▼ 1
Brazil	3,649,433	<b>-29%</b>	37	40	▼ 3
China	3,314,579	<b>-93%</b>	2	43	▼ 41
South Africa	1,937,336	<b>-40%</b>	51	54	▼ 3

Source: IATA



### China travel restrictions easing

China expanded the list of countries Chinese travelers can visit by over 70 as it eases COVID-19 travel restrictions.

This follows the gradual return of international flights to pre-pandemic levels. Previously, China imposed strict lockdowns and border closures due to the pandemic. While some restrictions were lifted last year, passport issuance and foreign travel remained limited.



## Greece leads EU in Length of Stay and Arrivals as a Sun and Beach destination

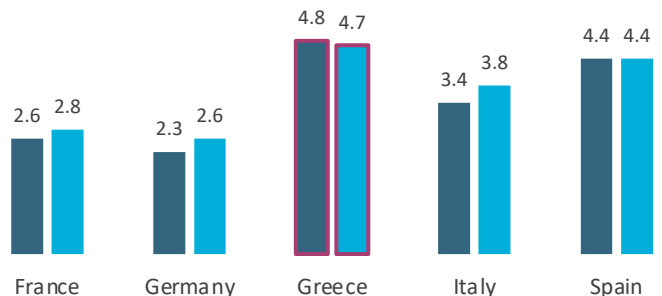
### Greece's IATA Connectivity Rank increased by 6 percentage pts. since 2019

Getting to and from Greece has become a far simpler process in the past three years. Given the EU's regional alliance, many travelers visit various countries across the EU on a trip. With increased connectivity, it's not only easier for travelers to enter and leave Greece, but to travel throughout Greece, such as ferrying across the various islands.

Greece is known for its iconic beaches, appeal of various islands and ancient history – offers which appeal to many travelers. Greece is a **leading EU countries for the length of stay of inbound travelers**. This can be attributed to some factors including that Greece has various travelers attractions: cities, islands, and ancient heritage spaces. Also, Greece has experience slow recovery for top destination cities like Athens, Rhodes, Heraklion, and Thessaloniki despite their position as a leader for inbound arrival recovery. This indicates that instead of going into cities, international travelers are prioritizing leisure trips on the coast and rural locations. **Sun and beach is a key selling point for Greece as a traveler destination.**

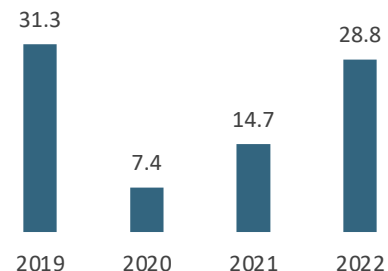
### EU: Length of Stay

Number of Days



### Greece: Inbound Arrivals

Number of Passenger Arrivals, Mn



Arrivals continue to rebound doubling Y-O-Y in '21 and '22.

Greece has returned to ~92% of pre-pandemic levels.

# Singapore's focus on transportation improvements fuel travel growth



## Enhanced connectivity help attract inbound travelers

Singapore's transition from primarily a transit hub to a prominent destination for both leisure and business travel **has been driven by liberal air transport policies, coupled with substantial investments in hotels, resorts, retail areas, and attractions.** Additionally, Singapore has extended this synergy between aviation and travel to the cruise industry, upgrading existing facilities and developing new ones, with the Marina Bay facility as the prime example, further solidifying its position as a dynamic travel hub.

The Singaporean government invested heavily in the travel industry in 2021, inserting **SGD68.5 Mn into the Tourism Development Fund** to support the sector.

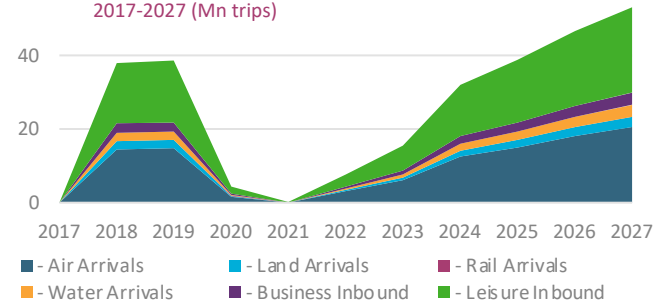
Singapore has extensive infrastructure improvements planned through 2025 and beyond with key projects including the addition of nearly 30 railway stations to the Thomson-East Coastline (TEL)\*; the Orchard Road revitalization; the expansion of the **Changi Airport Terminal 5 to handle an annual capacity of 50 million by 2030**; and a **High-Speed Rail connecting Kuala Lumpur and Jurong East by 2031.**

As a result of Singapore's investment in connectivity and travel, forecasted inbound arrivals are expected to surpass pre-pandemic numbers by 2025.

\* - TEL is a fully underground mass rapid transit line running from North to South and with connection to Malaysia

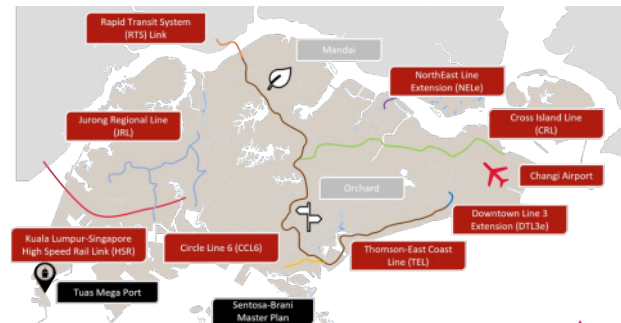
## Singapore Inbound Arrivals – 60

2017-2027 (Mn trips)



Source: UNWTO, Euromonitor International. Note: Inbound arrivals is the sum of air, land, rail and water arrivals, incl: business and leisure.

## Singapore's Infrastructure Developments



Source: HVS publication In Focus Singapore 2022

## Average Length of Stay is higher for more isolated nations while areas with higher connectivity have shorter lengths of stay

Rank	Country	Days	
1	Australia	11.3	
2	Brazil	11.2	
3	Saudi Arabia	11.1	
4	Mexico	10.2	
5	Thailand	9.2	
6	USA	8.6	
7	United Arab Emirates	6.0	
8	United Kingdom	5.9	
9	Canada	5.7	
10	Greece	4.7	
11	Spain	4.5	
12	Singapore	4.4	
13	Italy	3.8	
14	Turkey	3.0	
15	France	2.9	
16	China	2.7	
17	Germany	2.6	
18	South Africa	2.0	

Source: Euromonitor



### Destination appeal and ease of travel impact length of stay

While destination appeal is a key factor that influences the length of stay for travelers as they consider what they'll fill their days with, logistical factors can and will encourage or discourage extended visits.

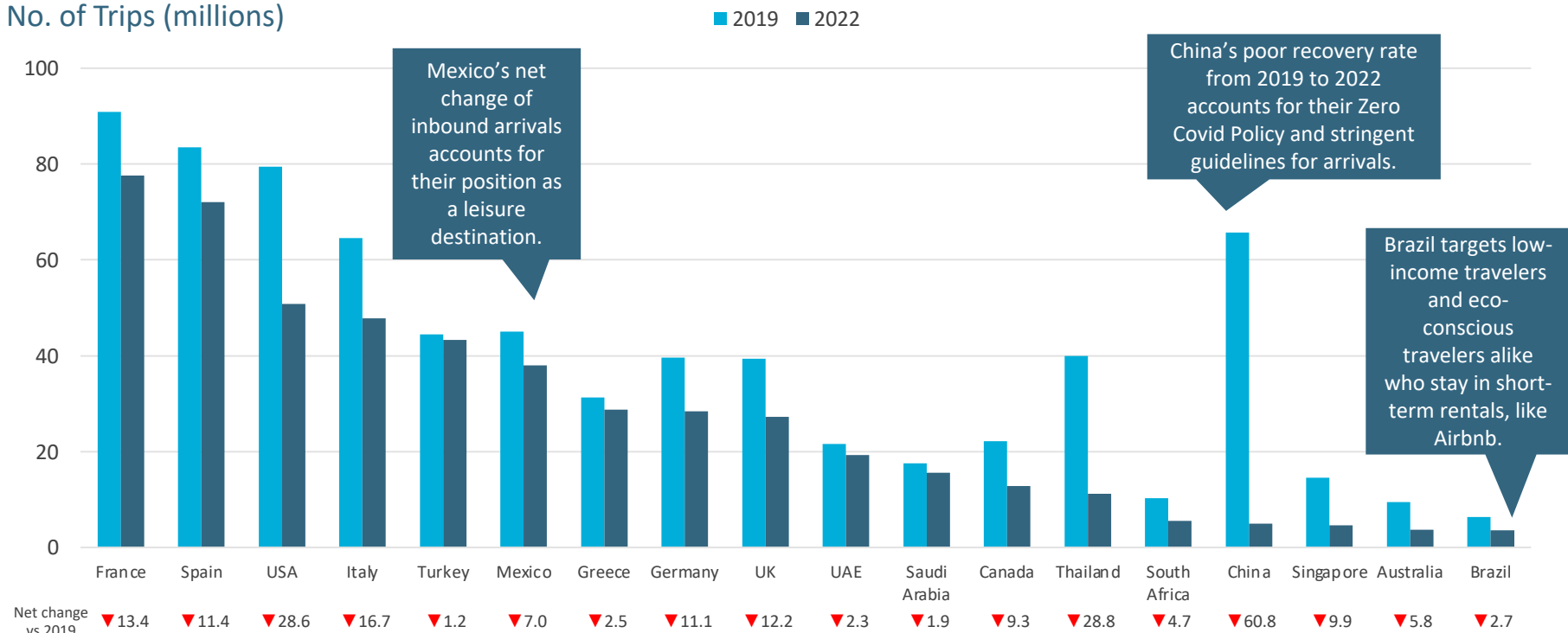
Policies that can alleviate domestic travel concerns, like travel fares, transportation delays, public transport, vehicles, and accessibility of travel attractions and activities.

### Schengen Implications

The greatest impact on the average length of stay for Schengen-region countries is the loose visa regulations and the proximity of each nation to one another. This geographical advantage allows travelers to easily explore multiple EU countries within a single trip. The absence of stringent visa restrictions for EU member states further facilitates this ease of movement, encouraging travelers to extend their stays across the region but keeping visits to each country short as they can seamlessly cross borders without the need for visa processes.

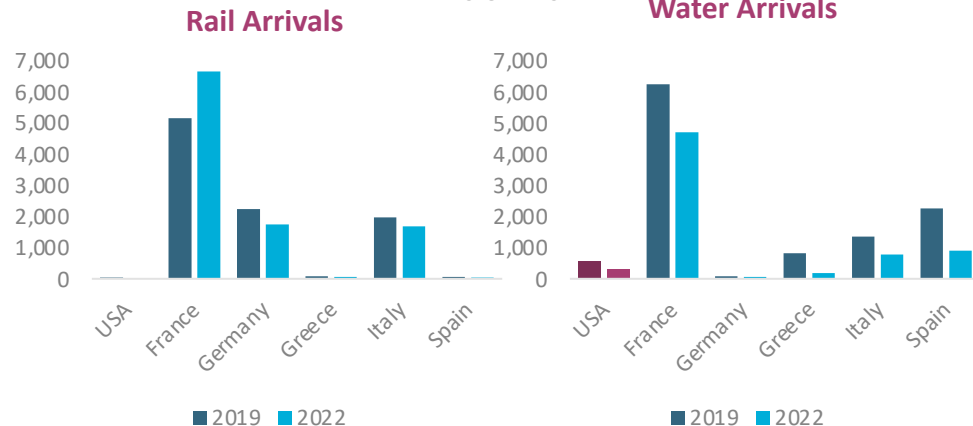
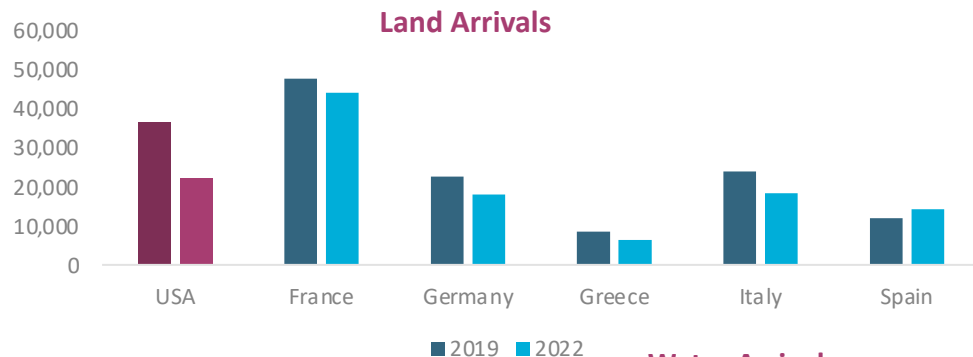
## Declines in Inbound Arrivals (2019 vs 2022) led by China, Thailand and the United States

No. of Trips (millions)



Source: Euromonitor International

## France leads in land, rail, and water arrivals by hundreds of thousands of trips



### Difficulties with domestic travel within the United States

Planning a trip to the United States can be notably challenging for travelers seeking rail, or water-based exploration, as the country's infrastructure is primarily designed for air and land travel via motor vehicles.

Unlike other regions that boast extensive and efficient internal transportation systems, the United States faces limitations in its connectivity. Limited high-speed rail options and fragmented waterway networks make overland and water-based travel less practical and less accessible for travelers. Consequently, travelers to the United States often find themselves heavily reliant on air travel to move between major destinations, as rental cars are not accessible to all and the spend per transaction on rental cars has increased by 17% between 2019 and 2022.

“Once you’re in Europe, cross boarder travel is easy. You can visit many places in one trip. Americans tend to come over and visit several locations rather than just one country.” - European Aviation Safety Agency Member

## Countries with leading international airports who exceed capacity signify a demand for travel with high rates of inbound travel or inefficient airports

Rank	Country	Leading International Airport	Passengers (Mn)	Capacity (Mn)	% of Operating Capacity	
1	USA	Hartsfield-Jackson Atlanta International Airport	89.9	110.0	82%	
2	United Arab Emirates	Dubai International Airport	59.0	92.5	64%	
3	France	Paris Charles de Gaulle Airport	46.1	72.0	64%	
4	United Kingdom	London Heathrow Airport	45.4	36.5	124%	
5	Mexico	Aeropuerto Internacional Benito Juárez	45.0	32.0	141%	
6	Turkey	Istanbul Airport	44.4	90.0	49%	
7	Germany	Frankfurt Airport	42.7	65.0	66%	
8	Spain	Madrid Barajas Airport	39.3	35.0	112%	
9	China	Chengdu Shuang Liu International Airport	38.9	50.0	78%	
10	Brazil	Guarulhos International Airport	38.3	60.0	64%	
11	Canada	Toronto Pearson International Airport	32.4	35.0	93%	
12	Saudi Arabia	King Abdul Aziz International Airport	25.8	80.0	32%	
13	Australia	Sydney Airport	25.8	45.0	57%	
14	Italy	Rome Fiumicino Airport	24.5	35.0	70%	
15	Greece	Athens E Venizelos Airport	16.7	26.0	64%	
16	Singapore	Changi Airport	13.7	95.0	14%	
17	Thailand	Suvarnabhumi Airport	13.4	45.0	30%	
18	South Africa	OR Tambo International Airport	13.1	28.0	47%	

Source: Desk research, Euromonitor



## Air Traffic Control Workforce Shortages

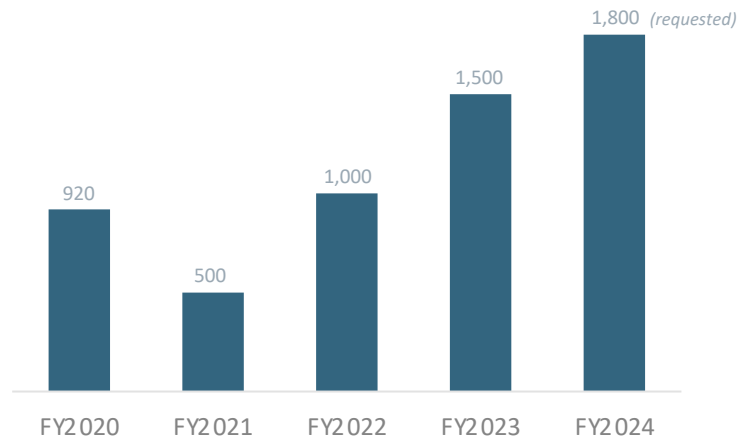
Ensuring adequate staffing and training for air traffic controllers—an essential part of maintaining the safety and efficiency of the National Airspace System (NAS)—has been a challenge for the Federal Aviation Administration (FAA), especially at the Nation’s most critical facilities.

Overall, based on FAA’s process for prioritizing placement of controllers throughout the NAS, the Department of Transportation’s Inspector General determined that 20 of 26 (77%) critical facilities are staffed below the Agency’s 85-percent threshold. In 2022, there were approximately 1,000 fewer certified air traffic controllers than a decade ago.

Due to the ATC workforce shortage, the FAA implemented waivers to cut service by 10% into the New York City area airspace until October 27, 2024. The number of controllers is not sufficient to allow the FAA to handle normal traffic levels, which led to these cuts. If these workforce shortages continue, it will further limit air travel growth, negatively impact efficiency, and reduce safety. The ATC workforce shortage will impact the ability of the United States to remain globally competitive.



### Air Traffic Controller Hiring by Fiscal Year



A shortage of air traffic controllers is impacting safety. At a recent Senate hearing, safety experts testified that staffing shortages are leading to fatigue and distraction, which is likely contributing to the growing list of near misses at airports this year.

The FAA released a controller workforce plan for the next decade in May and said in response it “fully understands that adequate staffing at its critical facilities helps ensure the safety and efficiency of the National Airspace System and is committed to getting to adequate staffing levels.”

## Connectivity improvements of key global airport mega hubs are mainly driven by expansion activities: of destination footprint, of new carriers, of fleet capacity, of flights and of airports

Rank in 2023	Airport	Country	Rank in 2019	Dominant Carrier	Share of Flights	Difference in 2023 VS 2019 Rank
48	RUH	Saudi Arabia	73	Saudi Arabian Airlines	41%	25
33	DOH	Qatar	57	Qatar Airways	80%	24
31	FUK	Japan	52	Japan Airlines	19%	21
35	SAW	Turkey	55	Pegasus Airlines	60%	20
36	ATH	Greece	56	Aegean Airlines	34%	20
5	HND	Japan	22	All Nippon Airways	36%	17
34	BOM	India	51	IndiGo	42%	17
2	JFK	USA	18	Delta Air Lines	34%	16
46	HAN	Viet Nam	61	Vietnam Airlines	37%	15
15	MNL	Philippines	29	Philippine Airlines	32%	14
47	MEL	Australia	60	Qantas Airways	34%	13
43	TPE	Chinese Taipei	54	EVA Airways	24%	11
7	IST	Turkey	17	Turkish Airlines	79%	10
25	DEL	India	35	IndiGo	39%	10

Source: [OAG Megahubs 2023 Report](#)

NOTE: The table above presents countries/airports that have seen double-digit growth in 2023 vs. 2019.

- Turkey's Istanbul (IST) airport's jump in rank by 10 points is fostered by **fleet expansion by Turkish Airlines (IST's dominant carrier)** that has been **adding more destinations in Central Asia and the U.S. and increasing flight frequency to some destinations**. Turkey's low-cost carrier – **Pegasus Airlines** despite **using only narrow-body planes** has also **been adding new routes/flights** (to the EU, Asia, Middle East, with North Africa and the Baltics in the pipeline), **plus expanding its portfolio of Airbus A321neos aircraft**. Its **improved connectivity is also supported by expansion of Istanbul's Sabiha Gokcen airport – it's main origin**.
- New York's JFK Airport (JFK) rank movement - up by 18 points from 2019, is partly driven by **American Airlines operating 7 more international destinations in 2023**, and new services from several carriers including Qantas, Air New Zealand and Air Senegal.



## Heathrow Airport Expansion, UK

Heathrow's expansion plans include a new, full length, runway to the north-west of the airport and several new facilities both on and off the airfield. Under these plans, capacity for an additional 260,000 flights per year would be created. The expansion plan was paused due to the Court of Appeals but was overturned by the Supreme Court. Following the Supreme Court's decision, Heathrow is working through next steps in the expansion plan.



## U-Tapao, Thailand

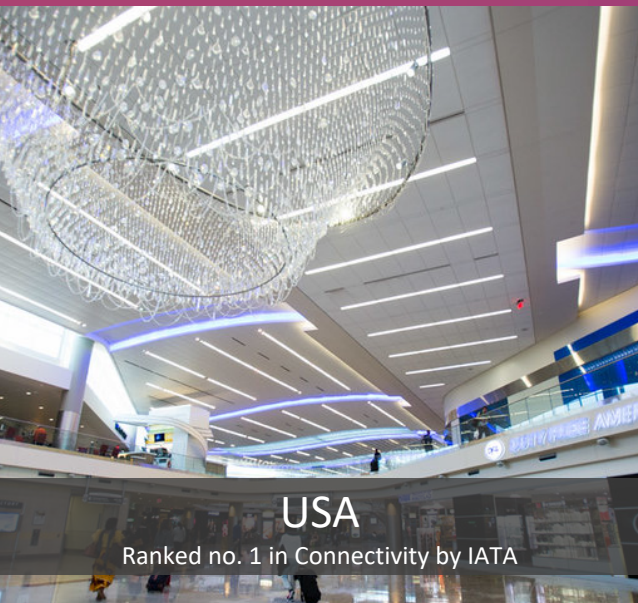
The U-Tapao aviation city project aims to transform the U-Tapao airport into the country's third major international airport. Connected through a high-speed rail network, it will serve as Bangkok's third international gateway and offer creative living, working, and entertainment opportunities in the Eastern Airport City. With its central location, the project provides excellent accessibility to major cities in Thailand and ASEAN countries. It is estimated to cost 8.8 billion USD.



## Al Maktoum International Airport expansion, Dubai

Al Maktoum International Airport aims to become the world's largest airport. The \$33 billion expansion project targets a capacity of up to 255 million passengers annually by 2050, with an initial phase accommodating 130 million passengers per year by 2030. While paused during the pandemic, discussions are underway to restart the project.





## USA

Ranked no. 1 in Connectivity by IATA



## Germany

Ranked no. 3 in Connectivity by IATA



## China

IATA Connectivity Score fell 94% since 2019

The United States leads the other countries in the scorecard in the IATA connectivity score by serving as a global hub for direct and connecting flights, facilitating travel between various regions and countries.

Germany is considered highly globally connected due to its well-developed transportation infrastructure, including extensive air and rail connections, as well as its membership in the Schengen Area.

China's connectivity has been hindered by stringent COVID policies, but with more relaxed policies coming into place, China's inbound and outbound travel is expected to show a very different picture in 2023, especially in intra-regional travel within the APAC region.

## China and India are forecasted to be the largest outbound travel markets

### Leading travel destinations are already engaging with top outbound markets

Leading travel destinations must proactively prepare for the influx of travelers from the APAC region, and particularly, Chinese and Indian travelers, in the coming years. The large population, coupled with the increasing affluence of their middle classes and rising disposable incomes, means Chinese and Indian travelers will have the financial means to embark on international travel and spend generously while abroad. Moreover, travelers from these nations tend to have longer average lengths of stay due to the relatively greater complexities associated with travel to and from these regions.



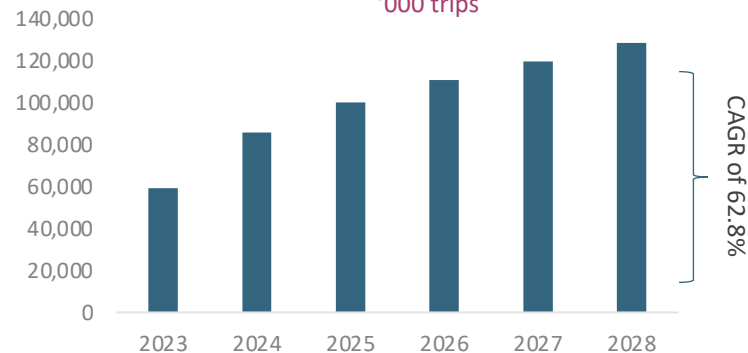
Australia's "Too Australian for Words" campaign aimed to generate excitement for Australian experiences for Chinese travelers



UK's VisitBritain launched a major marketing campaign across social media and on billboards in Delhi and Mumbai to grow inbound travel from India

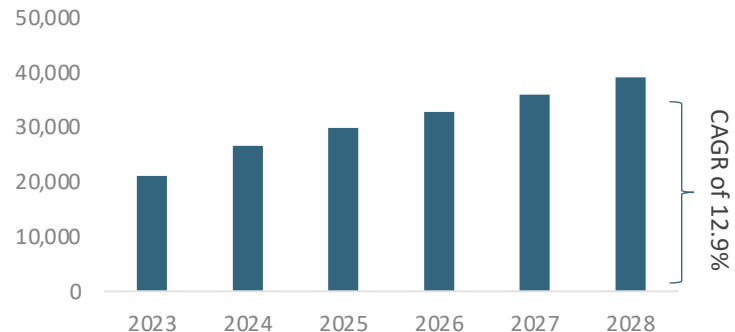
### Forecasted China Outbound Departures

'000 trips



### Forecasted India Outbound Departures

'000 trips



Source: Euromonitor International Passport 2022, Tourism Australia, VisitBritain

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# 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.**

## 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.

# Thank you

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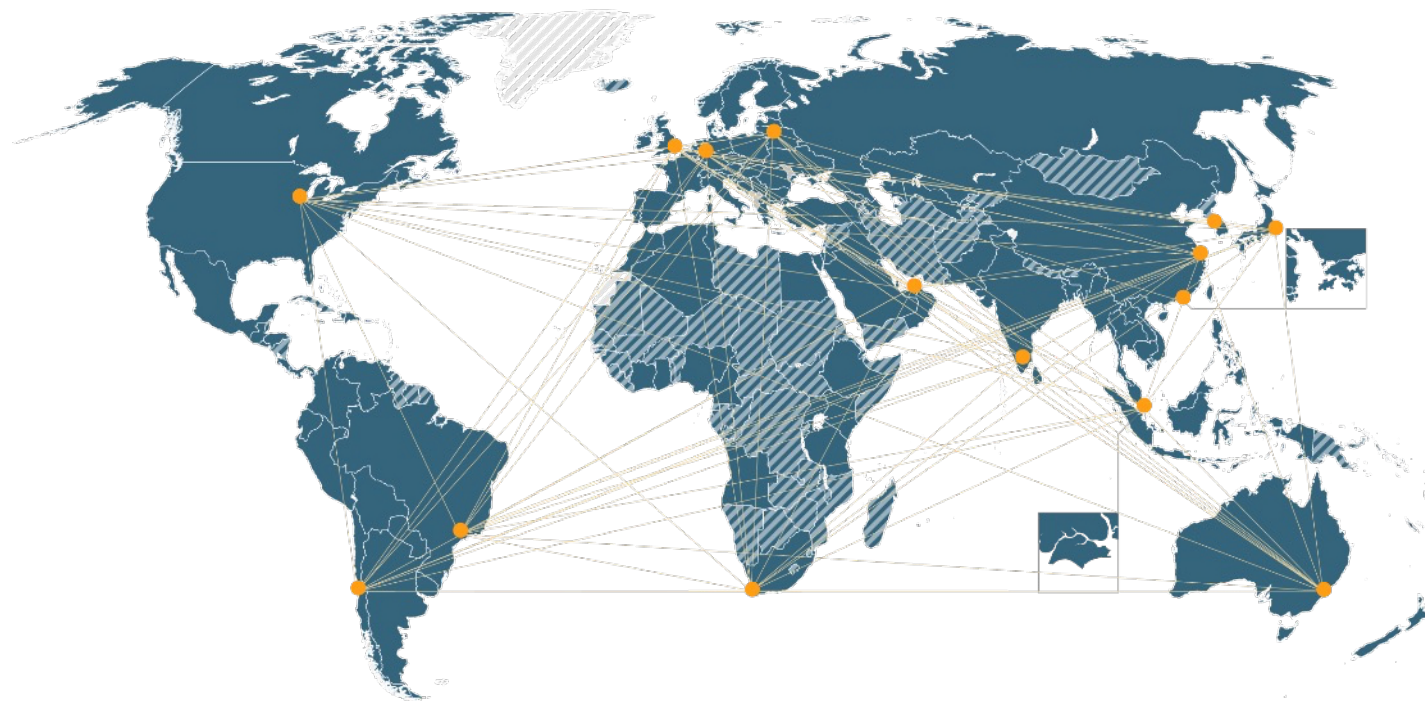
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