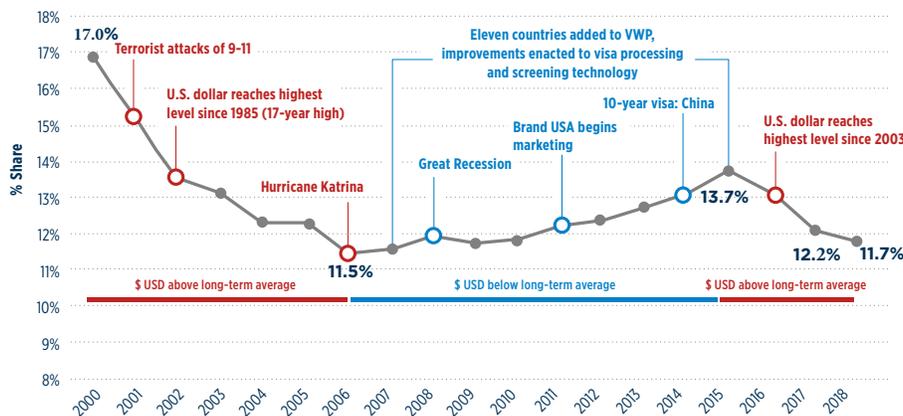


THE U.S. IS LOSING MARKET SHARE: BUT WE HAVE A HUGE OPPORTUNITY



- The U.S. faces a pressing challenge: **America's share of the international travel market has declined from 13.7 percent in 2015 to 11.7 percent in 2018.** America isn't winning when it's falling behind global heavyweights like China, Germany, France, the U.K., Spain and others.
- **Had the U.S. maintained its 2015 market share, it would have received 14 million more visitors** from abroad and **\$59.4 billion** in additional traveler spending. That translates to **120,000 more American jobs.** It is comparable to:
 - Opening 30 **auto plants**—equal to the 4,000-job plant Toyota announced for Alabama in January 2018
 - Opening two **new Amazon headquarters**, which will bring 50,000 jobs to a U.S. destination/city
- A bold new **national strategy on travel and tourism** should include preserving funding for **Brand USA**, America's travel promotion organization; expansion of the **Visa Waiver Program**; growth in trusted traveler programs; and additional border screening personnel.

U.S. Share of Global Long-Haul Travel



SOURCE: U.S. Travel Association

The U.S. has underperformed all but one of the top 15 destinations since 2015.

Growth Rate in Long-Haul Visitation from 2015 to 2018



SOURCE: U.S. Travel Association based on Oxford Economic data