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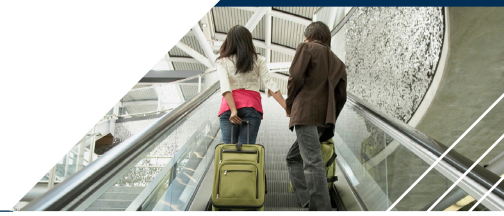
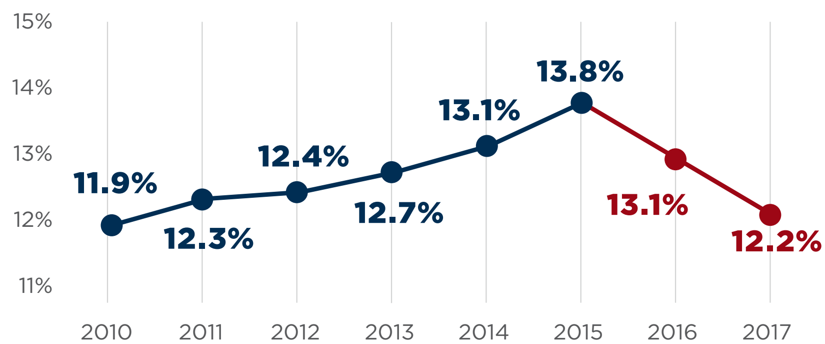
THE U.S. IS LOSING MARKET SHARE: BUT WE HAVE A HUGE OPPORTUNITY



- The U.S. faces a pressing challenge: **America's share of the international travel market has declined from 13.8 percent in 2015 to 12.2 percent in 2017.** Even after posting growth in overseas visitations in 2017, the U.S. continued to lose market share for the second consecutive year. In 2017, global long-haul travel grew at an impressive rate of 9.3 percent while overseas travel to the U.S. grew by only 2 percent. 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 7.2 million more visitors** from abroad and **$30.7 billion** in additional traveler spending. That translates to **96,000 more American jobs.** It is comparable to:
  - Opening 25 **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



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

Growth Rate In Long-Haul Visitation from 2015 to 2017

Source: U.S. Travel Association