

UNITED STATES TRAVEL AND TOURISM ADVISORY BOARD

September 13, 2023

The Honorable Gina Raimondo
Secretary of Commerce
Washington, D.C. 20230

Dear Secretary Raimondo:

On behalf of the United States Travel and Tourism Advisory Board (TTAB), I'd like to thank you for the opportunity to present recommendations to further our nation's efforts to accelerate recovery for the travel and tourism industry, a sector that is well established as critical to the health of the U.S. economy. You previously requested that TTAB provide recommendations on what can the federal government do, in cooperation with the private sector, to message internationally that the United States is a welcoming destination for visitors.

TTAB examined ways in which the federal government could craft a cohesive messaging strategy with supporting tactics to enhance the United States' positioning as a leader in sustainable travel, a diverse and welcoming destination, and counter narratives in source markets around potential safety and security concerns. We were also tasked with looking at the impact of travel restrictions during the pandemic and their impact on the U.S. image in international markets.

In response, we are pleased to submit the following recommendations.

Background

Pre-pandemic, nearly 80 million international travelers, half from Canada and Mexico alone, generated nearly \$240 billion in travel exports to the United States. International inbound travel is an important segment of the travel industry, accounting for [\\$116 billion](#), or 10%, of travel spending in 2022, according to the [U.S. Travel Association](#). The segment is 55% recovered, compared to domestic leisure travel (99%) and business travel (71%).

The five-year goal set by the National Travel and Tourism Strategy (NTTS) in 2022, is to attract 90 million international visitors to the United States each year, which would generate \$279 billion to support American travel workers and businesses.

According to Brand USA research¹, the United States continues to lead other countries as the most desired destination for travelers around the world. Nevertheless, there are key challenges the industry faces from a competitive standpoint.

- **Visas/Entry Experience** – We applaud the progress that Customs and Border Protection has made in improving the arrivals experience in recent years. Nevertheless, international travelers compare the U.S. arrivals experience to that of other countries and research shows there is still significant opportunity for improvement. A substantial percentage of travelers view U.S. visa requirements/entry procedures as very or extremely discouraging to visitation – India (59%), Mexico (44%) and Brazil (42%) were among the most discouraged markets. However, visa waiver countries such as Australia (42%) and U.K. (39%) also show significant levels of discouragement. Spain was the lowest at 34%, signaling that at least a third of potential visitors from most major markets have a negative view of the U.S. entry requirements and experience. This research highlights the importance of leveraging technology to further enhance the ease and speed of our visa, pre-arrival, and arrival experiences.
- **Lack of International Visitor Support** – While many major U.S. gateway cities cater to international visitors well, areas outside of the most popular tourism destinations do not consistently provide resources and support needed to welcome international visitors. The percentage of travelers who cited lack of visitor resources/support in the destination as very or extremely discouraging to U.S. visitation ranged from 24-53% across the markets. For example, visitors cite a lack of multi-language signage or off-hour dining options as contributing to this sentiment. Especially as the industry works to disperse visitors from tourism hotspots, it is important that lesser-visited destinations are prepared to receive visitors who may not be familiar with the area and may not understand English.

RECOMMENDATIONS

Recommendation #1: Throughout our nation and industry, there is a lack of both frequency and consistency of welcoming messaging for our international visitors.

We recommend that the Department of Commerce supports industry partners and Brand USA's efforts in these key areas:

(1) Collaborate with government agencies such as Customs and Border Protection to continue to improve the arrivals experience and promote a consistent welcoming message at all points of entry for international travelers.

(2) Work with industry partners and/or associations to launch a grassroots program, similar to the REAL ID campaign, to educate the industry on the importance of implementing a consistent welcome message to international audiences. The campaign should include a tool kit for the industry – state tourism boards, city destination marketing organizations, airports, attractions, hotels and other travel and tourism entities – with messaging and marketing assets (e.g.,

¹ 2022 Brand USA Market Intelligence fielded by Phocuswright in AU, BE, BR, CA, CN, DE, ES, FR, IN, IT, JP, KR, MX, NL, UK. N≥1,000 in each market.

welcome messaging in multiple languages, tips for marketing to international guests, resources to better address visitors with accessibility challenges) for turnkey implementation that creates national consistency. In addition to the physical points of entry, the messaging should be included in all related virtual contact points, including the ESTA website and app and the Mobile Passport Control app.

(3) To effectively measure competitiveness, we recommend the federal government work with industry partners or third-party experts on the creation of a benchmark that reviews the efforts and travel promotion budgets of competitive destinations from around the world. This research and measurement is relevant post COVID-19 pandemic given competitive destinations from around the world have been increasing funds to fuel recovery in travel and tourism

Recommendation #2: Continue to invest in and enhance the use of technology to support ease of travel for international visitors. While, State and DHS, as outlined in the National Travel and Tourism Strategy, are exploring and piloting improvements in technology (e.g., new developments to identify travelers' identities and expanding remote processing) there is an additional opportunity.

We recommend continued investment in the use of technology to address visa wait times and explore E-Visa as a long-term solution, and specifically extending the waiver on in-person interviews for low-risk renewals beyond 12/31/23. Nearly 9 million visas are up for renewal next year in China alone – plus millions of others globally. In addition, specific goals and metrics should be adopted immediately in order to measure improvements and identify roadblocks more easily.

Recommendation #3: There is a lack of consistency throughout the U.S. on the readiness level of destinations in terms of their ability to effectively welcome international visitors.

We recommend working with industry partners or organizations through NTTO on a comprehensive readiness program that will create easy-to-use tools for smaller destinations to utilize and create consistency throughout the nation. The program should include a readiness tool kit that educates destinations, small businesses, hotels, restaurants, and attractions looking to increase their international visitation on specific steps they can take to be better prepared to welcome international visitors.

Recommendation #4: We recognize that disaster response can be uneven due to the diversity of our states. This can cause confusion, especially for international visitors and their perception of the U.S.

We recommend that the federal government create better alignment for disaster preparedness and response. One significant challenge during the COVID-19 pandemic was strategies being implemented state by state and locally, versus on a national level. The federal government could facilitate alignment with national and international experts, depending on the issue, to help ensure that there is consistency on the state and local level.

Recommendation #5: It is important to address the balance between maintaining a safe and secure nation and welcoming international visitors.

We recommend working with private sector members of WTTC or a third-party expert to conduct a global and multi-lateral review of best practices to identify strategies that have been successful and may be applied within our country.

By adopting the approaches suggested above – including close collaboration between the public and private sectors – we are confident we can make meaningful strides in safely and expediently welcoming international visitors, while directly supporting the NTTS goal of attracting 90 million international visitors to the U.S. on an annual basis.

Respectfully submitted,

A handwritten signature in black ink, appearing to be 'BH' with a stylized flourish.

Bill Hornbuckle
Chair

A handwritten signature in blue ink, reading 'Brad Dean'.

Brad Dean
Vice Chair