Study of International Visitor Satisfaction of the United States

Measuring the Competitiveness of the United States Versus Other Global Destinations

NATIONAL TRAVEL AND TOURISM OFFICE | 2023 REPORT
STUDY OF INTERNATIONAL VISITOR SATISFACTION OF THE UNITED STATES

Industry
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Executive Summary

Travel and tourism is a unique industry, defined not by one particular product or service but by a range of products and services (e.g., transportation, lodging, entertainment, food and retail services) provided to the customer, who is referred to as a visitor. For international travel to the United States, the product is the experience in the United States delivered by the travel and tourism industry, and the customer is the international visitor.

International travel is an important part of the U.S. economy. In 2023, 66.3 million travelers from other countries visited the United States and spent $226 billion, supporting 1.8 million jobs in the United States.[1] This spending accounted for 7.4 percent of total U.S. exports of goods and services. That same year, international travel to the United States generated 12.5 percent of global travel exports, more than any other country.[2]

Globally, a country's reputation as an international destination is primarily determined by the visitor experience, which is the top factor influencing travelers' decisions in choosing a destination. In 2023, 40 percent of first-time international visitors to the United States made their decision based on recommendations from friends and relatives—considerably more than advertising (15 percent), proximity (16 percent), travel agency recommendation (13 percent), or special offers and deals (14 percent).[3]

The purpose of this study is to provide foundational research to identify the parts of the international visitor experience where the United States (1) has a competitive advantage, (2) is competitive or (3) has a competitive disadvantage in international travel compared to other leading destinations. The findings highlight the strengths of the United States as an international destination and opportunities for improvement to attract more prospective international visitors.

This study provides new and insightful research that supports efforts to increase the competitiveness of U.S. travel and tourism. The National Travel and Tourism Office (NTTO) works across the federal government and with the U.S. travel and tourism industry to meet the goal of the National Travel and Tourism Strategy: to welcome 90 million international visitors, who are estimated to spend $279 billion annually, by 2027. NTTO is part of the International Trade Administration's Industry and Analysis business unit at the U.S. Department of Commerce.

This report compares the experience of international visitors traveling to the United States in 2023 to their experience in other leading global travel destinations through survey analysis and internet review ratings. This report is being released along with a 2019 report, which can be used as a baseline.

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[1] International Trade Administration, National Travel and Tourism Office, International Visitor Arrivals Program – ADIS I-94. (2022). Annual Arrivals 2000 to present country of residence [Excel spreadsheet]. U.S. Department of Commerce.
[2] UN Tourism. (n.d.). Tourism data dashboard. UN Tourism. Retrieved September 23, 2025. (UN Tourism)
[3] MMGY Global. (2023). MMGY Travelsat Competitive Index 2023. MMGY Global.

Section 1:
Measuring the Competitiveness of the United States as a Travel and Tourism Destination Based on Survey Analysis

For overseas visitors, the United States had a competitive advantage in 5 of the 10 categories of the visitor experience; was competitive in 4 categories; and had a competitive disadvantage in 1 category compared to the competition (i.e., other global destinations visited by the United States' major overseas source markets).

- The United States had a competitive advantage in half (25) of the 50 components across all 10 visitor experience categories analyzed in this report, was competitive in 16 components, and had a competitive disadvantage in 9 components.

For visitors from Canada and Mexico, the United States had a competitive advantage in 9 of the 10 categories of the visitor experience and had a competitive disadvantage in 1 category compared to the competition (other global destinations visited by Canadian and Mexican international travelers).

- The United States had a competitive advantage in more than two-thirds (34) of the 50 components across all 10 visitor experience categories, was competitive in 10 components, and had a competitive disadvantage in 6 components.

Section 2:
Measuring the Competitiveness of the United States as a Travel and Tourism Destination Based on Internet-Based Rating and Reviews

For international visitors overall, ratings were measured for three industry verticals: attractions, restaurants, and accommodations.

- Ratings of U.S. attractions and restaurants closely mirrored global competitors.

- Ratings of U.S. accommodations were measurably lower than global competitors.

- International visitors from all major source markets analyzed in this report had a favorable view of the United States as a global destination, and this favorable view extended to all nine Census divisions across the country.

Key Takeaways of the Study

- The United States continues to provide international visitors with a satisfying and competitive experience across the entire visitor journey.

- The neighboring markets of Canada and Mexico show a more pronounced competitive advantage for the United States compared to other global destinations visited by Canadian and Mexican travelers—an advantage that has largely remained steady since the 2019 baseline. These travelers often report a better overall experience in the United States than elsewhere, with only a few aspects of the visit falling short.

- From the perspective of overseas visitors, of the top 10 drivers influencing visitor satisfaction globally in 2023 and covered in Section 1 of the report, the United States had a competitive advantage in four drivers, was competitive in three, and had a competitive disadvantage in three.

- From the perspective of Canadian and Mexican visitors, of the top 10 drivers influencing visitor satisfaction globally in 2023 the United States had a competitive advantage in six drivers, was competitive in two, and had a competitive disadvantage in two.

- Overseas markets continue to view the U.S. as offering less value for money compared to other global destinations. However, the country's vast size and diverse tourism experiences contribute to strong intentions to return—particularly when compared to its competitors.

- The United States continues to be competitive on key criteria essential to visitor satisfaction, notably ease of communication and customer service.

- All major source markets analyzed in this report had a favorable view of the United States as a global destination, and this favorable view extended to all nine census divisions across the country.

- The United States also continues to stand out for its exceptional entertainment experiences (e.g., amusement parks, shows) and outperforms in shopping experiences, beaches, and urban architecture.

- Granular results from an analysis of internet ratings and reviews further corroborate that the United States maintains an exceptionally good experience when it comes

to its offerings in adventure tourism. The subcategories of environmental and eco excursions, guided tours, water sports, and camping and hiking all stand at the top of the attractions vertical. Furthermore, the attractions vertical in 2023 scored higher than the benchmark of 2019.

- To enhance the competitive position of the United States as a global destination, several aspects of the visitor experience that need improvement include the feeling of safety, public transportation, and the integration of landscapes outside iconic parks and nature destinations into the visitor experience. Canadian and Mexican visitors reported that the reception of international visitors by the local population could be improved, while overseas markets report concerns related to the cost of the visitor experience in the United States across multiple aspects of the visit.

- While the fundamental standards of quality are consistently maintained nationwide, enhancing the perception of value for money will also depend on innovation in local experience design. This includes developing hybrid experiences that blend elements such as culture and culinary, outdoor activities and wellness, shopping and the arts, and unique offerings like artist hotels, private night visits to museums, intimate pop-up events, and music performances set in iconic landscapes or architectural environments, which help elevate value perceptions.

- Additionally, catering to specific niche markets and passion-driven audiences—such as stargazing enthusiasts, wine aficionados, yoga retreat seekers, van life explorers, and film location spotters—has the power to maximize perceptions of value for money.

Introduction

Travel and tourism is a critical driver of economic growth and employment in the United States. In 2023, travel and tourism accounted for 3.0 percent of U.S. gross domestic product (GDP) and generated $2.6 trillion in economic output, supporting 10 million American jobs—or approximately one in every 16 jobs in the United States.[4]

Travel and tourism is a unique industry, defined not by one particular product or service but by a range of products and services—transportation, lodging, entertainment, food and retail services, etc.— provided to the customer, who is referred to as a "visitor." For international travel to the United States, the product is the experience delivered by the U.S. travel and tourism industry, and the customer is the international visitor.

The Bureau of Economic Analysis (BEA) defines a visitor as "a person who travels outside of their usual environment (more than 50–100 miles from the area of normal, everyday activities) for less than a year or who stays overnight in a hotel or motel. The visitor may travel for pleasure or business (private sector or government). Visitors exclude travelers who expect to be compensated at the location of their visit (such as migrant workers, persons traveling to new assignments, and diplomatic and military personnel traveling to and from their duty stations and their home countries)."[5]

Following a historic global decline during the COVID-19 pandemic, international travel has been recovering. By 2023, international arrivals to the United States reached 66.3 million visitors, or 84 percent of 2019 levels. Travel exports—spending by international visitors during their trips to the United States—totaled $226 billion and supported 1.8 million jobs, reaching 94 percent of 2019 levels.[6] That same year, international travel to the United States generated 12.5 percent of global travel exports—more than any other country.[7] Continued growth of international travel to the United States is of great importance to the travel industry and the broader U.S. economy.

As with other industries, the competitiveness of travel and tourism is largely based on its reputation with its customer base compared to the competition. In the case of international travel to the United States, the competition consists of other major global destinations that attract similar international traveler profiles.

Globally, a country's reputation as a travel destination is primarily determined by the visitor experience, which is the top factor (as investigated in the survey) influencing travelers' decisions when choosing a destination—more than advertising, proximity, or special offers and deals. The quality of the experience, as reflected in the reputation international travelers share with friends and relatives after a trip, influences future travelers' decision-making more than any other factor (see Figure 1).

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[4] U.S. Travel and Tourism Satellite Account (2023), Bureau of Economic Analysis, U.S. Department of Commerce.
[5] Travel and Tourism Satellite Account for 2018-2022, Survey of Current Business, Bureau of Economic Analysis, U.S. Department of Commerce.
[6] NTTO, I&A, ITA.
[7] UN Tourism.

Factors Influencing Travelers' Destination Selections
Visitors to the United States and Global Competitors

Friends and Relatives' Experiences	37%
Advertising	12%
Proximity to Destination	9%
Special Offers and Deals	8%
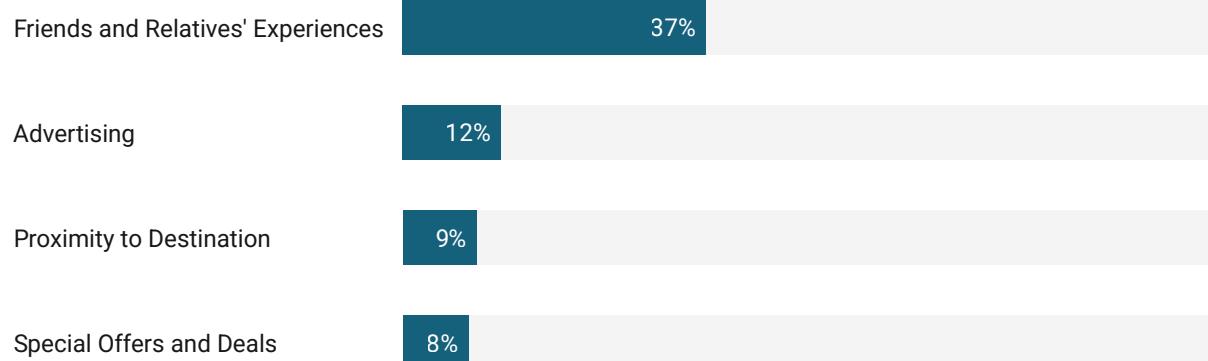
This report by the National Travel and Tourism Office, part of the International Trade Administration's Industry and Analysis business unit at the U.S. Department of Commerce, is the second in a series of reports that measures the competitiveness of the United States as a travel and tourism destination over time, based on the experience of the international visitor.

A 2019 baseline report is being released along with this report. Using 2019 data as the baseline, the report assesses the competitive position of the United States prior to the COVID-19 pandemic to establish a reference point for future analysis of international visitor satisfaction.

This second report, covering 2023, assesses the competitive position of the United States three years after the COVID-19 pandemic severely impacted international travel globally.

For both this 2023 report and the 2019 baseline report, the National Travel and Tourism Office (NTTO) contracted with MMGY TCI Research to assist with the research and analysis. TCI Research is part of MMGY Global, an integrated global travel and hospitality marketing firm.

This report is divided into two sections, each with a separate methodology:

- Section 1 analyzes the United States' international competitiveness as a travel and tourism destination using survey data.

- Section 2 evaluates the United States' international competitiveness as a travel destination using online ratings and reviews.

Section 1.
International Competitiveness of the United States Based on Survey Analysis

A. Survey Methodology and Analysis

For this report, NTTO and MMGY TCI Research used the TRAVELSAT© Competitive Index, which is recognized worldwide as an independent benchmark to gauge the competitiveness of destinations based on visitor experience ratings. Awarded the Ulysses Prize by the UN World Tourism Organization (now UN Tourism) in 2011 for its excellence and innovation in improving destination governance, TRAVELSAT© has since been utilized by over 150 destinations and tourism stakeholders globally.

The competitive benchmarking includes more than 60 indicators related to the visitor experience across all stages of the journey. The methodological approach encompasses survey analytics and includes the following components:

- **Survey data from the TRAVELSAT© Competitive Index Database:** The survey involved 1,760 interviews with international visitors to the United States during the 2023 calendar year. Eligible respondents were selected from nationally representative online panels in outbound markets using quota-based screening. Interviews were conducted anonymously via the MMGY TCI Research survey platform, which ensures rigorous quality control through monitoring of response time, completion rates, and consistency.

- **Comparative analysis of visitor satisfaction scores:** Ratings from international visitors to the United States were compared against two competitive benchmarks:

  1. **Overseas Market:** Satisfaction ratings of overseas travelers to the United States (USA) were compared to the satisfaction ratings of overseas travelers to 14 U.S.-competitive source markets (collectively, the OVS Benchmark).

  2. **Canada-Mexico Market:** Satisfaction ratings of Canadian and Mexican travelers to the United States (USA) were compared to the satisfaction ratings of Canadian and Mexican travelers to 13 U.S.-competitive source markets (collectively, the CanMex Benchmark).

The reason for dividing this analysis between overseas markets and the markets of Canada and Mexico is that, from 2015 to 2019, visitors from overseas countries accounted for 50.2 percent of international visitors to the United States, while visitors from Canada and Mexico accounted for 49.8 percent. Additionally, the United States' unique geographic position relative to Canada and Mexico—compared to more distant international markets—creates a different context and degree of visiting potential, justifying the separation of visitor experience data.

OVS Benchmark: A group of 14 countries representing top long-haul destinations for the United States' leading overseas source markets, excluding Canada and Mexico. The overseas benchmark reflects the United States' primary competition in global long-haul travel and includes the following countries: **France, Spain, the United Kingdom, Italy, Germany, Thailand, the United Arab Emirates, Canada, China, Mexico, Portugal, Egypt, Morocco, and India**. Survey results are weighted based on international visitor arrivals for each country.

CanMex Benchmark: A group of 13 countries representing leading international destinations for Canadian and Mexican travelers. The CanMex Benchmark highlights the United States' primary competitors in attracting international visitors from Canada and Mexico. The countries included are: **France, Cuba, Mexico, Spain, the United Kingdom, Italy, Japan, Portugal, Germany, India, China, Greece, and the United Arab Emirates**. Survey results are weighted according to international visitor arrivals in each country.

How to Interpret the TRAVELSAT© Competitive Index

- The TRAVELSAT© Competitive Index uses a standardized proprietary scoring scale ranging from 1 to 10, with a score of 10 representing the best or most favorable performance. The index reflects the level of satisfaction for each rated criterion and typically ranges from -50 to 400. The main function of indexes is to benchmark a destination's experience quality against that of the average competition.

- Scores from extremely satisfied or dissatisfied visitors, which are more likely to greatly influence the destination's reputation, are weighted more highly in comparison to arithmetic averages in order to take into consideration their higher reputation impact.

- A difference of 10 points or more between a U.S. score and a benchmark score is considered statistically significant. Consider the following scenarios:

    - The U.S. score is at least 10 points or more greater than the Overseas or CanMex Benchmark score: The United States has a statistically significant competitive advantage.

    - The U.S. score within ±10 points of the Overseas or CanMex Benchmark score: no significant difference; the United States is competitive.

    - The U.S. score is at least 10 points less than the Overseas or CanMex Benchmark score: The United States has a statistically significant competitive disadvantage.

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The example below illustrates how the United States compares with the benchmark market score for an international visitor experience category and three subcategories. As shown, the United States has a statistically significant competitive score in this overall category when compared with the benchmark score (i.e., a U.S. rating of 208 is within 10 points of the Overseas Benchmark rating of 210). A closer look at the subcomponents of this category shows that the United States has a competitive advantage in Subcategory 1, remains competitive in Subcategory 2, and faces a competitive disadvantage in Subcategory 3.

Interpreting the TRAVELSAT© Competitive Index
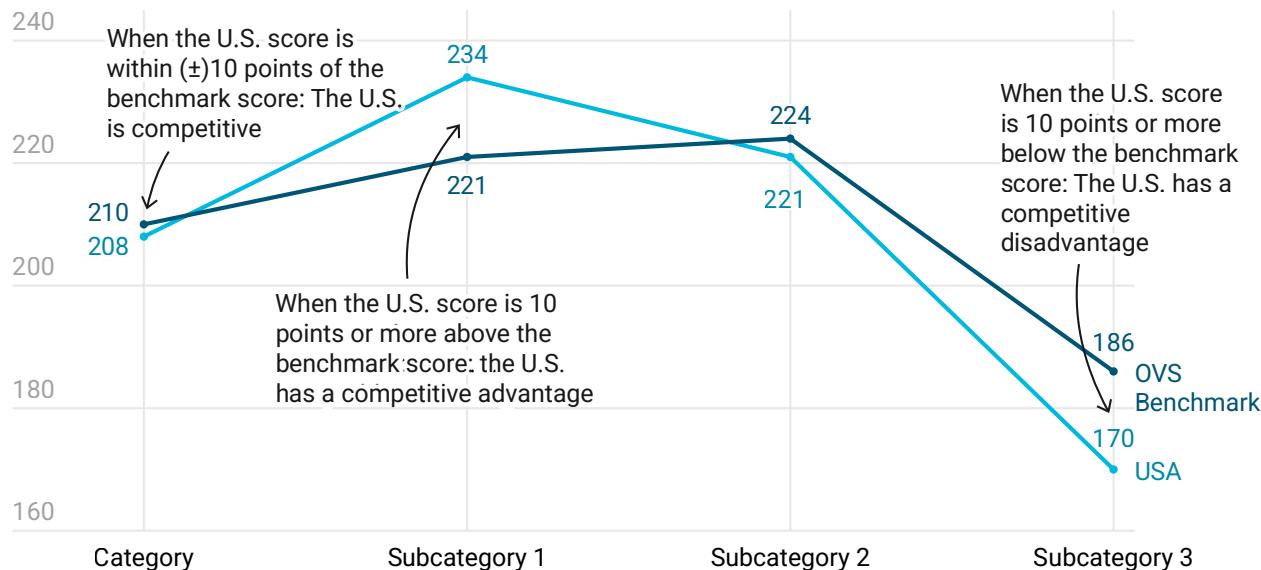
Profile of TRAVELSAT© Survey Respondents Who Rated Their U.S. Visitor Experience

Home Country

🇨🇦	Canada	36%
🇲🇽	Mexico	25%
	Other Market	12%
🇬🇧	UK	7%
🇯🇵	Japan	3%
🇧🇷	Brazil	3%
🇫🇷	France	3%
🇩🇪	Germany	3%
🇰🇷	South Korea	3%
🇮🇳	India	3%
🇨🇳	China	2%

U.S. Census Divisions Visited

Pacific 19%
Mountain 11%
West North Central 1%
West South Central 7%
New England 4%
Middle Atlantic 23%
East North Central 6%
South Atlantic 28%
East South Central 1%

Age

|	
18 - 34 years	29%
35 - 49 years	31%
50+ years	40%

Sex

Female (42%)   Male (58%)

Total

1760 Interviews

Period of analysis: The data shown above was collected in 2023.
TRAVELSAT© Index calculations are weighted based on NTTO statistics in order to represent the share of outbound international markets to the U.S. and the census divisions visited.

The TRAVELSAT© survey components completed by overseas, Canadian and Mexican visitors cover nearly all aspects of the visitor experience, both in the United States and in other global destinations.

Accommodation
- Overall quality
- Hospitality of personnel
- Value for money

Local Food
- Overall quality
- Diversity and choice
- Hospitality of restaurant personnel
- Value for money

Historical Heritage
- Diversity and range of historic sites and monuments
- Management and maintenance of historic sites and museums
- Hospitality at historic sites and museums
- Entrance fees for historic sites and museums
- Convenience of visiting busy tourist attractions and crowdedness

Transportation
- Cost of transportation to reach the destination
- Accessibility of public transport
- Hospitality of personnel on public transport
- Price of public transport
- Hospitality at entry point
- Taxi service
- Parking convenience
- Transportation infrastructure (roads)
- Access to/from the airport
- Ease of finding way using signage

Culture and Leisure
- Diversity and range of leisure and cultural activities
- Theater, opera, and cultural shows
- Amusement and theme parks
- Price of leisure activities
- Guided tours
- Nightlife (bars, nightclubs)

Shopping
- Range of shopping possibilities
- Value for money
- Hospitality of personnel in shops
- Hours/days of operation
- Quality of handicrafts and Souvenirs

Tourist Information Centers
- Number of information centers available
- Efficiency of personnel
- Hours of operation

Beaches and Water Activities
- Beauty of Beach
- Diversity and range of beaches
- Cleanliness and upkeep
- Safety for swimming
- Water activities

Environment
- Beauty of landscapes
- Cleanliness of public areas
- Cleanliness outside cities
- Architecture and urban development
- Commitment to the environment

Local Hospitality and Feelings of Safety
- Hospitality of locals
- Ease of communication with local people
- Safety and feeling of security

General Key Performance Indicators
- Overall fulfillment of expectations
- Intention to recommend (net promoter score)
- Intention to repeat visit
- Overall value for money

B. Top-Line Results: Visitor Satisfaction in the United States

Overseas Visitor Satisfaction in the United States versus the Overseas Benchmark

Overseas visitors' satisfaction with their experiences in the United States is measured across 10 key experience categories and compared to overseas visitors' satisfaction levels at other top global destinations visited by our major source markets (OVS Benchmark). For details, see Table

Table 1: United States vs. Overseas Benchmark

Overseas visitors' rating of the U.S. in 10 key visitor experience categories compared to overseas visitors' rating of benchmark markets in the same categories.

	Experience Category	USA	OVS Benchmark	Difference
1	Tourist Information Centers	194	153	41
2	Shopping	205	170	35
3	Culture and Leisure	212	184	28
4	Beach and Water	254	235	19
5	Local Hospitality and Feeling of Safety	200	188	12
6	Transportation	168	164	4
7	Environment	183	180	3
8	Historical Heritage	206	205	1
9	Accommodation	208	210	−2
10	Local Food	175	191	−15

In 2023, the United States demonstrated a competitive advantage in 5 of the 10 visitor experience categories: Tourist Information Centers, Shopping, Culture and Leisure, Beach and Water, and Local Hospitality and Feeling of Safety.

The United States was competitive in 4 categories: Transportation, the Environment, Historical Heritage, and Accommodation.

In one category, the United States had a competitive disadvantage: Local Food.

Compared to the other major international long-haul destinations visited by the United States' top overseas source markets, the United States had a competitive advantage in 25 of the 50 subcategories within the 10 key visitor experience categories; was competitive in 16 subcategories; and had a competitive disadvantage in 9 subcategories.

The top 6 subcategories where the United States had the greatest competitive advantage spanned 4 different overall visitor experience categories: Range of Shopping Possibilities (Shopping), Ease of Communication with Locals (Local Hospitality and Feeling of Safety), Amusement and Theme Parks (Culture and Leisure), Hours/Days of Operation (Shopping), Smartphone Application (Tourist Information Centers), and Hours/Days of Operation (Tourist Information Centers).

The terms "cost," "price," or "value for money" was included in the description of 5 of the 9 subcategories where the United States had a competitive disadvantage: Cost of Transportation to Reach the Destination (Transportation), Price of Leisure Activities (Culture and Leisure), Price of Public Transport (Transportation), Value for Money (Accommodation), and Value for Money (Local Food).

Canadian and Mexican Visitors to the United States versus CanMex Benchmark. Canadian and Mexican visitors' satisfaction in the United States compared to other top global destinations visited by Canadian and Mexican visitors (CanMex Benchmark) is measured through the 10 visitor experience categories (see Table 2).

Table 2: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States across 10 key visitor experience categories are compared to their ratings of benchmark destinations in the same categories.

	Experience Category	USA	CanMex Benchmark	Difference
1	Tourist Information Centers	247	183	63
2	Beach and Water	317	255	62
3	Shopping	254	193	60
4	Culture and Leisure	256	221	35
5	Transportation	232	202	30
6	Local Food	250	222	28
7	Accommodation	257	239	18
8	Local Hospitality and Feeling of Safety	256	239	16
9	Environment	251	240	11
10	Historical Heritage	280	292	−12

The United States had a competitive advantage in 9 of the 10 categories: Tourist Information Centers, Beach and Water, Shopping, Culture and Leisure, Transportation, Accommodation, Local Hospitality Feeling of Safety, and the Environment. The United States had a competitive disadvantage in one category: Historical Heritage.

Compared to the other major international destinations visited by Canadian and Mexican travelers, the United States had a competitive advantage in more than two-thirds (34) of the 50 subcategories across all 10 visitor experience categories; was competitive in 10 subcategories; and had a competitive disadvantage in 6 subcategories.

The top 6 subcategories where the United States was most competitive spanned 4 different visitor experience categories: Parking Convenience (Transportation), Water Activities (Beach and Water), Cleanliness and Upkeep (Beach and Water), Hours/Days of Operation (Shopping), Range of Shopping Possibilities (Shopping), and Smartphone Application (Tourist Information Centers).

Of the 6 subcategories where the United States had a disadvantage, 1 related to "price," "entrance fee," or "value for money," which differs from the experience of overseas visitors, who were more impacted by the perceived high cost of traveling to the United States versus other global destinations.

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C. Overseas Visitor Satisfaction in the United States Compared to the Overseas Benchmark

Category 1. The Accommodation Experience

Accommodation: United States vs. Overseas Benchmark

Overseas visitors' ratings of the U.S. in the Accommodation visitor experience category compared to overseas visitors' ratings of benchmark markets in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference	
	Accommodation Experience	208	210		−2
1	Overall Quality	234	221		13
2	Hospitality of Personnel	221	224		−3
3	Value for Money	170	186	−16	

Accommodation: United States vs. Overseas Benchmark

▬ USA Rating
▬ Overseas Benchmark Markets' Rating
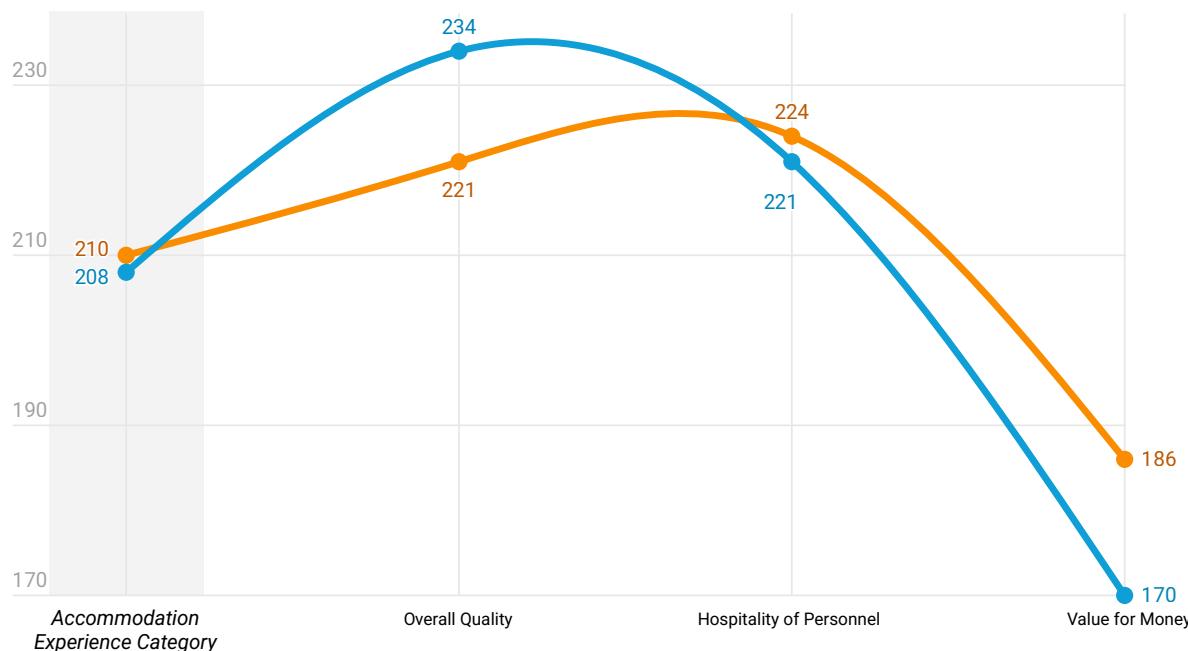
Importance of the Accommodation Experience. In 2023, 70 percent (22 million) of overseas visitors stayed in a hotel or motel while in the United States.[8]

- Of the 10 categories in this study, the U.S. Accommodation experience score of 208 by overseas visitors was the third-highest score, only below Beach and Water and Culture and Leisure.

- Within the Accommodation visitor experience category, the United States received high scores for Overall Quality (234), and Hospitality of Personnel (221), which were offset by a lower score for Value for Money (170).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Overall Quality subcategory (+13).

- **Competitive:** The United States received a competitive score for the Hospitality of Personnel subcategory (-3), as well as for the Accommodation visitor experience category (-2).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Value for Money subcategory (-16).

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[8] National Travel and Tourism Office, Survey of International Air Travelers.

Category 2. The Local Food Experience

Local Food: United States vs. Overseas Benchmark

Overseas visitors' rating of the U.S. in the Local Food visitor experience category compared to overseas visitors' rating of benchmark markets in the same category.

	Category/Subcategory	USA	OVS Benchmark	Difference
	Local Food Experience	175	191	−16
1	Diversity and Choice	189	187	2
2	Hospitality of Personnel	200	210	−10
3	Overall Quality	180	200	−19
4	Value for Money	131	166	−35

Local Food: United States vs. Overseas Benchmark

— USA Rating
— Overseas Benchmark Markets' Rating
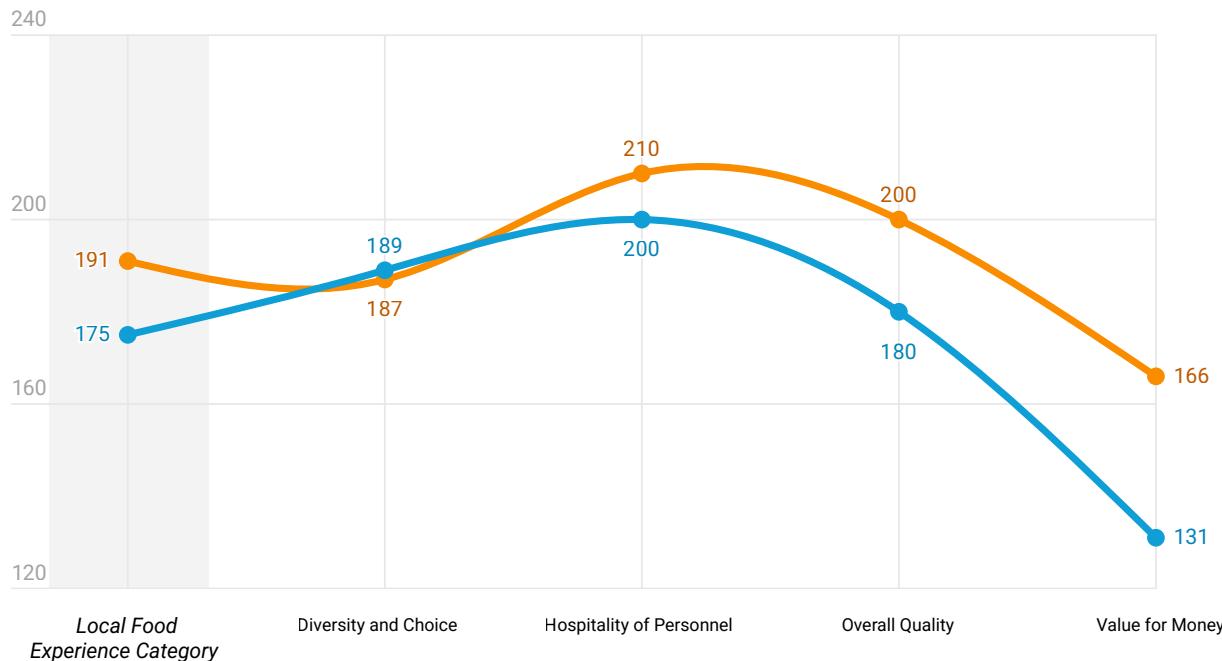
Importance of the Local Food Experience. In 2023, 26 percent (8.1 million) of overseas visitors experienced fine dining while in the United States.[9]

- Of the 10 categories in this study, the Local Food visitor experience score of 175 by overseas visitors was the second-lowest score, only above Transportation.

- Within the Local Food visitor experience category, the U.S. scored high on Hospitality of Personnel (200), Diversity and Choice (189), and Overall Quality (180); these high scores were offset by a lower score for Value for Money (131).

United States vs. Overseas Benchmark

- **Competitive:** The United States had a competitive score for the Diversity and Choice subcategory (+2) and the Hospitality of Personnel subcategory (-10).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Overall Quality subcategory (-19) and the Value for Money subcategory (-35) as well as for the overall Local Food visitor experience category (-15).

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[9] National Travel and Tourism Office, Survey of International Air Travelers.

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Category 3. The Transportation Experience

### Transportation: United States vs. Overseas Benchmark

Overseas visitors' ratings of the U.S. in the Transportation visitor experience category compared to overseas visitors' ratings of benchmark markets in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	Transportation Experience	168	164	4
1	Transportation Infrastructure (i.e., roads)	194	161	33
2	Parking Convenience	142	122	20
3	Ease of finding your way around using signage	182	162	20
4	Access to/from the airport	202	198	4
5	Hospitality of Personnel on Public Transit	162	160	2
6	Hospitality at Entry Point	168	168	0
7	Taxi Service	149	152	−3
8	Accessibility of Public Transport	195	204	−8
9	Cost of Transportation to Reach Destination	124	134	−10
10	Price of Public Transport	166	178	−12

Transportation: United States vs. Overseas Benchmark
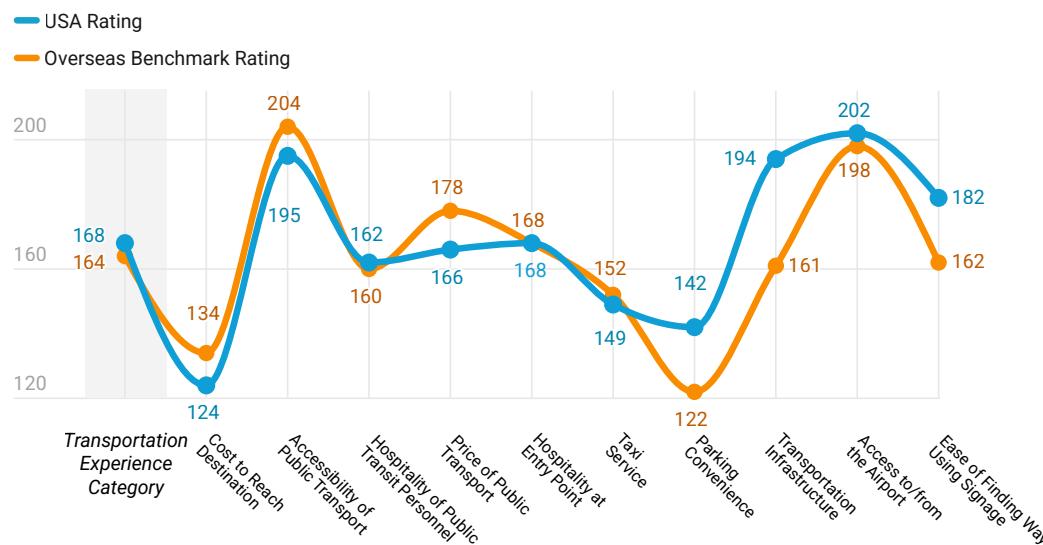
Importance of Transportation. In 2023, 37 percent (11.7 million) of overseas visitors used a private automobile, 31 percent (9.8 million) used a city subway/tram/bus, 28 percent (8.8 million) traveled by air between U.S. cities, and 27 percent (8.6 million) rented an automobile while in the United States.[10]

- Of the 10 visitor experience categories in this study, the U.S. Transportation experience score of 168 by overseas visitors was the lowest score.

- Within the Transportation Experience category, high U.S. scores for Access to/from the Airport (202), Accessibility of Public Transport (195), Transportation Infrastructure (194), and Signage and Ease of Finding Your Way Around (182) offset lowers score for Hospitality at Entry Point (168), Price of Public Transport (166), Hospitality of Personnel in public transport (162), Taxi service (149), Parking Convenience (142), and Cost of Transport to Reach the Destination (124).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Transportation Infrastructure subcategory (+33), the Ease of Finding your way using signage subcategory (+20), and the Parking Convenience subcategory (+20).

- **Competitive:** The United States had a competitive score for the Access to/from the Airport subcategory (+4), the Hospitality of Personnel on Public Transport subcategory (+2), the Hospitality at Entry Point subcategory (0), the Taxi Service subcategory (-3), and the Accessibility of Public Transport subcategory (-8) as well as for the overall Transportation experience category (+4).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Cost of Transport to Reach the Destination subcategory (-10) and the Price of Public Transport subcategory (-12).

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[10] National Travel and Tourism Office, Survey of International Air Traveler.

Category 4. The Culture and Leisure Experience

Culture and Leisure: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Culture and Leisure visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	Culture and Leisure Experience	212	184	28
1	Amusement and Theme Parks	302	248	54
2	Theater, Opera, Cultural Shows	208	168	40
3	Nightlife	198	164	35
4	Diversity and Range	239	210	29
5	Guided Tours	201	182	18
6	Price of Leisure Activities	121	132	−11

Culture and Leisure: United States vs. Overseas Benchmark

━━ USA Rating

━━ Overseas Benchmark Rating
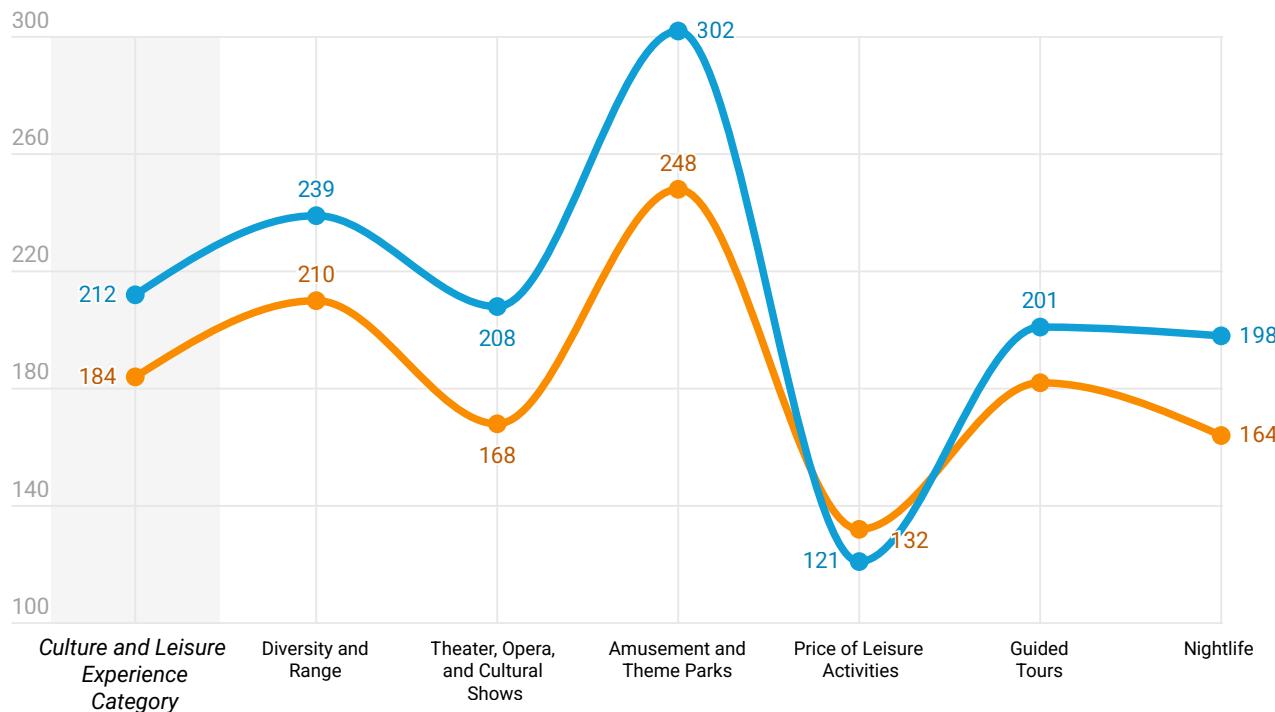
Importance of Culture and Leisure. In 2023, 30 percent (9.3 million) of overseas visitors went to art galleries or museums, 26 percent (8.2 million) went to amusement or theme parks, and 15 percent (4.6 million) went to concerts, plays, or musicals while in the United States.[11]

- Of the 10 categories in this study, the U.S. Culture and Leisure experience score of 212 by overseas visitors was the second-highest score, only below Beach and Water.

- Within the Culture and Leisure experience category, the U.S. received high scores for the Amusement and Theme Parks (302) and Diversity and Range (239) subcategories, which were offset by lower scores for Theater, Opera, Cultural Shows (208), Guided Tours (201), Nightlife (198), and Price of Leisure Activities (121).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Amusement and Theme Parks subcategory (+54), the Theater, Opera, Cultural Shows subcategory (+40), the Nightlife subcategory (+35), the Diversity and Range subcategory (+29), and the Guided Tours subcategory (+18) as well as for the overall Culture and Leisure visitor experience category (+28).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Price of Leisure Activities subcategory (-11).

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[11] National Travel and Tourism Office, Survey of International Air Travelers.

Category 5. The Shopping Experience

Shopping: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Shopping visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	Shopping Experience	205	170	35
1	Range of Shopping Possibilities	262	193	69
2	Operating Hours	239	188	51
3	Hospitality of Personnel	206	170	36
4	Value for Money	155	134	21
5	Quality of Handicrafts/Souvenirs	163	163	0

Shopping: United States vs. Overseas Benchmark

— USA Rating
— Overseas Benchmark Rating
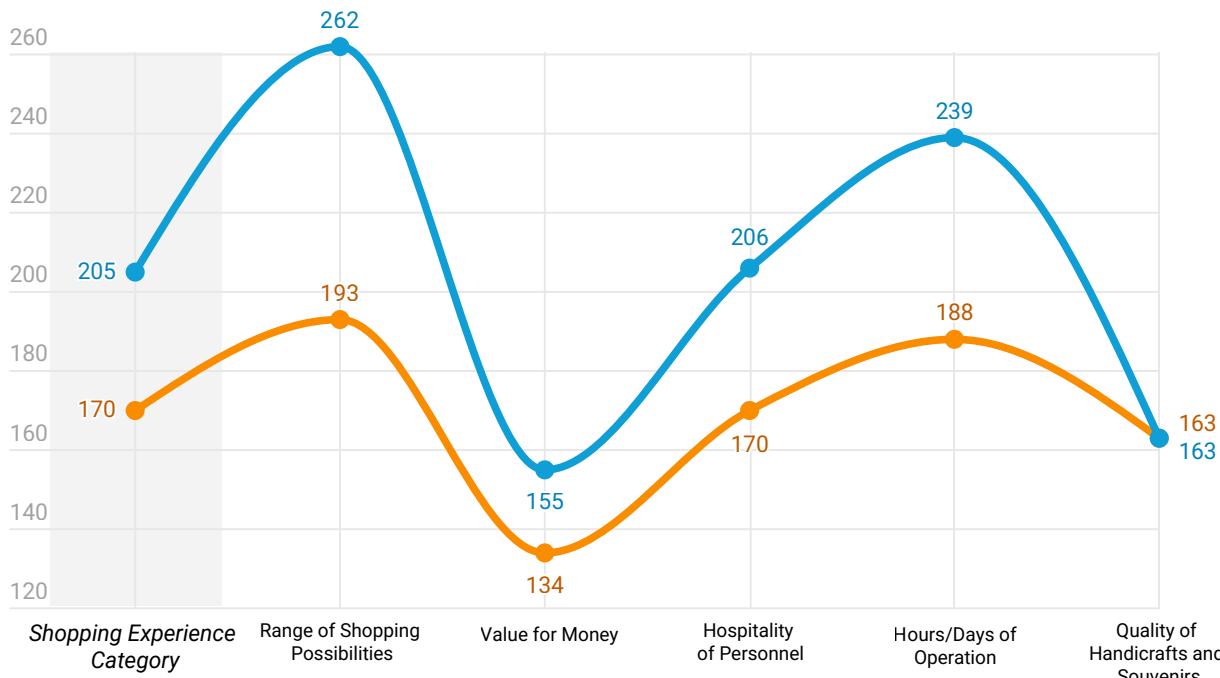
Importance of Shopping. In 2023, 82 percent (25.8 million) of overseas visitors shopped while traveling in the United States, spending an average $344 per visitor/trip on this leisure activity.[12]

- Of the 10 categories in this study, the U.S. Shopping visitor experience score of 205 by overseas visitors was the fifth-highest score.

- Within the overall Shopping visitor experience category, the U.S. received high scores for Range of Shopping Possibilities (262), Hours/Days of Operation (239), and Hospitality of Personnel (206), which were offset by lower scores for Quality of Handicrafts and Souvenirs (163) and Value for Money (155).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Range of Shopping Possibilities subcategory (+69), the Hours/Days of Operation subcategory (+51), the Hospitality of Personnel subcategory (+36), the Value for Money subcategory (+21) as well as for the overall Shopping visitor experience category (+35).

- **Competitive:** The United States had a competitive score for the Quality of Handicrafts and Souvenirs subcategory (0).

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[12] National Travel and Tourism Office, Survey of International Air Travelers.

Category 6. The Historical Heritage Experience

## Historical Heritage: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Historical Heritage visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	Historical Heritage Experience	206	205	1
1	Convenience of Visiting Popular Tourist Attractions and Crowdedness	193	168	24
2	Entrance Fees	157	151	7
3	Hospitality of Personnel	223	218	6
4	Management and Maintenance	227	229	−2
5	Diversity and Range	231	261	−29

Historical Heritage: United States vs. Overseas Benchmark

— USA Rating
— OVS Benchmark Rating
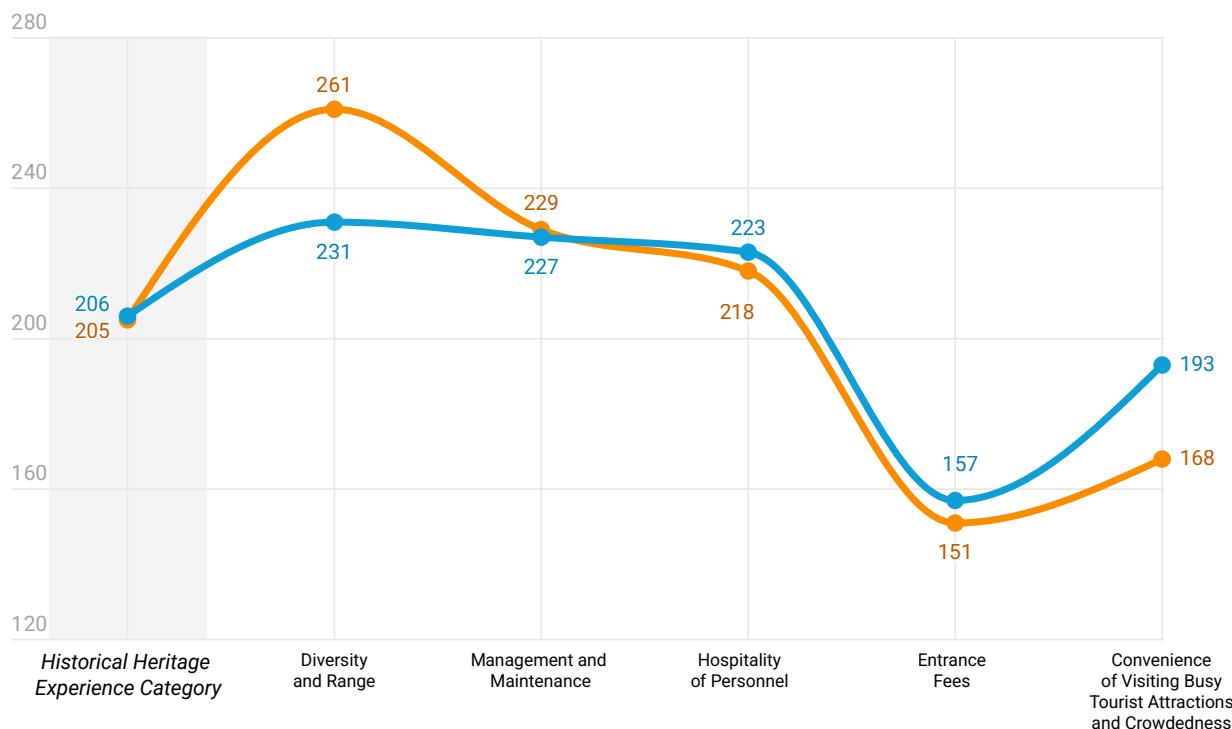
Importance of Historical Heritage. In 2023, 28 percent (8.6 million) of overseas visitors engaged with historical locations while traveling in the United States.[13]

- Of the 10 categories in this study, the U.S. Historical Heritage visitor experience score of 206 by overseas visitors was the fourth-highest score.

- Within the Historical Heritage experience category, the U.S. received high scores for Diversity and Range (231), Management and Maintenance (227), and Hospitality of Personnel (223), and lower scores for Convenience of Visiting Popular Tourist Attractions and Crowdedness (193) and Entrance Fees (157).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Convenience of Visiting Popular Tourist Attractions and Crowdedness subcategory (+24).

- **Competitive:** The United States had a competitive score for the Entrance Fees subcategory (+7), the Hospitality of Personnel subcategory (+6), the Management and Maintenance subcategory (-2), and the overall Historical Heritage visitor experience category (+1).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Diversity and Range subcategory (-29).

[13] National Travel and Tourism Office, Survey of International Air Travelers.

Category 7. The Tourist Information Center Experience

Tourist Information Centers: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Tourist Information Centers visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	Tourist Information Centers Experience	194	153	41
1	Smartphone Application	196	147	48
2	Hours/Days of Operation	207	161	46
3	Efficiency of Personnel	192	153	39
4	Number of Information Centers	182	151	31

Tourist Information Centers: United States vs. Overseas Benchmark

— USA Rating
— Overseas Benchmark Rating
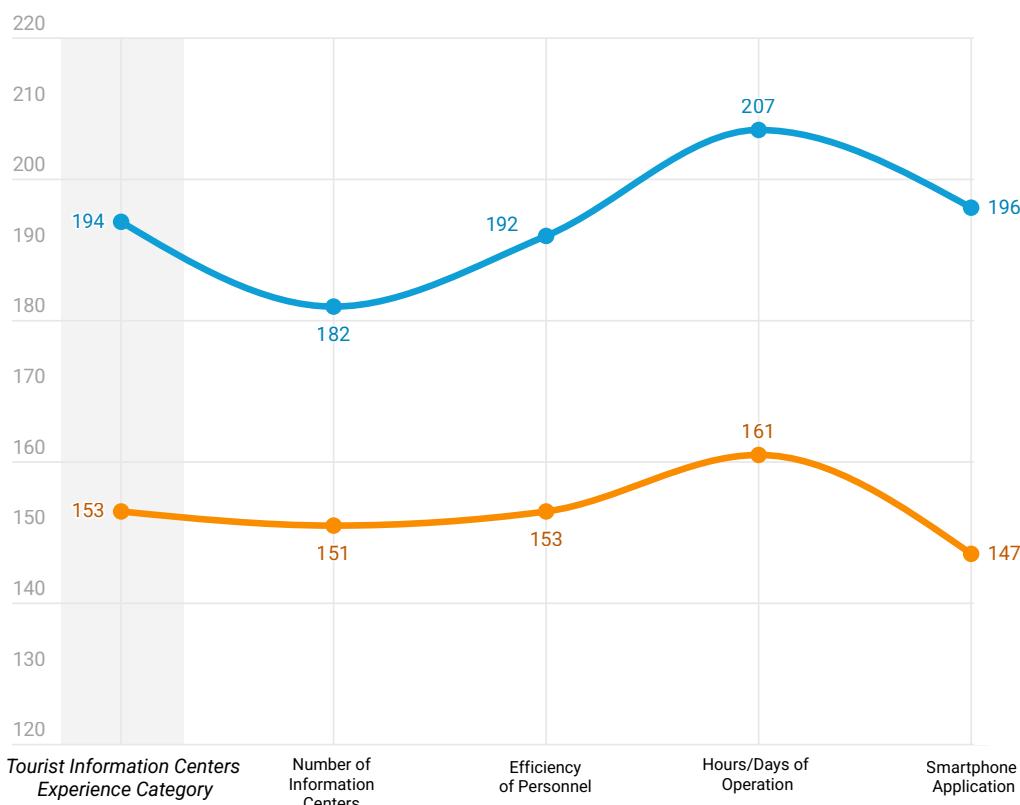
Importance of Tourist Information Centers: Tourist information centers serve an important role through managing visitor volume, promoting lesser-known attractions and events, and providing a comprehensive overview of a destination's offerings.

- Of the 10 categories in this study, the U.S. Tourist Information Centers visitor experience score of 194 by overseas visitors was the seventh-highest score.

- Within the overall Tourist Information Centers experience category, high U.S. scores for Hours/Days of Operation (207) and Smartphone Application (196) are offset by lower scores for Efficiency of Personnel (192) and Number of Information Centers (182).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Smartphone Application subcategory (+48), the Hours/Days of Operation subcategory (+46), the Efficiency of Personnel subcategory (+39), and the Number of Information Centers subcategory (+31) as well as the overall Tourist Information Centers experience category (+41).

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Category 8. The Beach and Water Experience

Beach and Water: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Beach and Water visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	Beach and Water Experience	254	235	19
1	Cleanliness and Upkeep	253	221	32
2	Water Activities	242	217	25
3	Safety for Swimming	246	223	23
4	Diversity and Range	247	235	12
5	Beauty of Beach	281	280	1

Beach and Water: United States vs. Overseas Benchmark

— USA Rating
— Overseas Benchmark Markets' Rating

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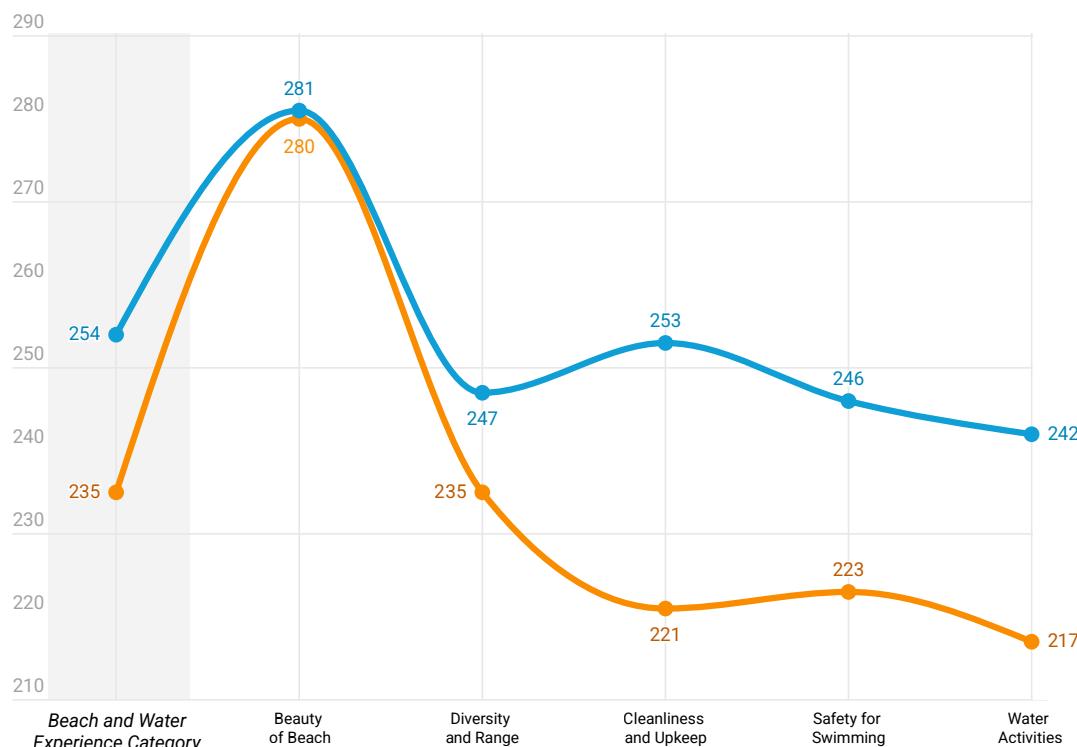
Importance of Beach and Water. In 2023, 7 percent (2.2 million) of overseas visitors engaged in water sports while traveling in the United States.[14]

- Of the 10 overall categories in this study, the U.S. Beach and Water visitor experience score of 254 by overseas visitors was the highest score.

- Within the Beach and Water visitor experience category, a high U.S. score for the Beauty of Beach subcategory (281) is offset by lower U.S. scores in the Cleanliness and Upkeep (253), Diversity and Range (247), Safety for Swimming (246), and Water Activities (242) subcategories.

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States received scores indicating statistically significant competitive advantage in the Cleanliness and Upkeep (+32), Water Activities (+25), and Safety for Swimming (+23) subcategories, as well as in the overall Beach and Water visitor experience category (+19).

- **Competitive:** The United States scored competitively in the Beauty of Beach subcategory (+1).

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[14] National Travel and Tourism Office, Survey of International Air Travelers.

Category 9. The Environment Experience

The Environment: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Environment visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	OVS Benchmark	Difference
	The Environment Experience	183	180	3
1	Architecture and Urban Development	192	173	18
2	Cleanliness of Outside Cities	178	162	16
3	Cleanliness of Public Areas	172	168	3
4	Commitment to the Environment	138	143	−5
5	Beauty of Landscapes	235	252	−17

The Environment: United States vs. Overseas Benchmark

— USA Rating
— Overseas Benchmark Rating

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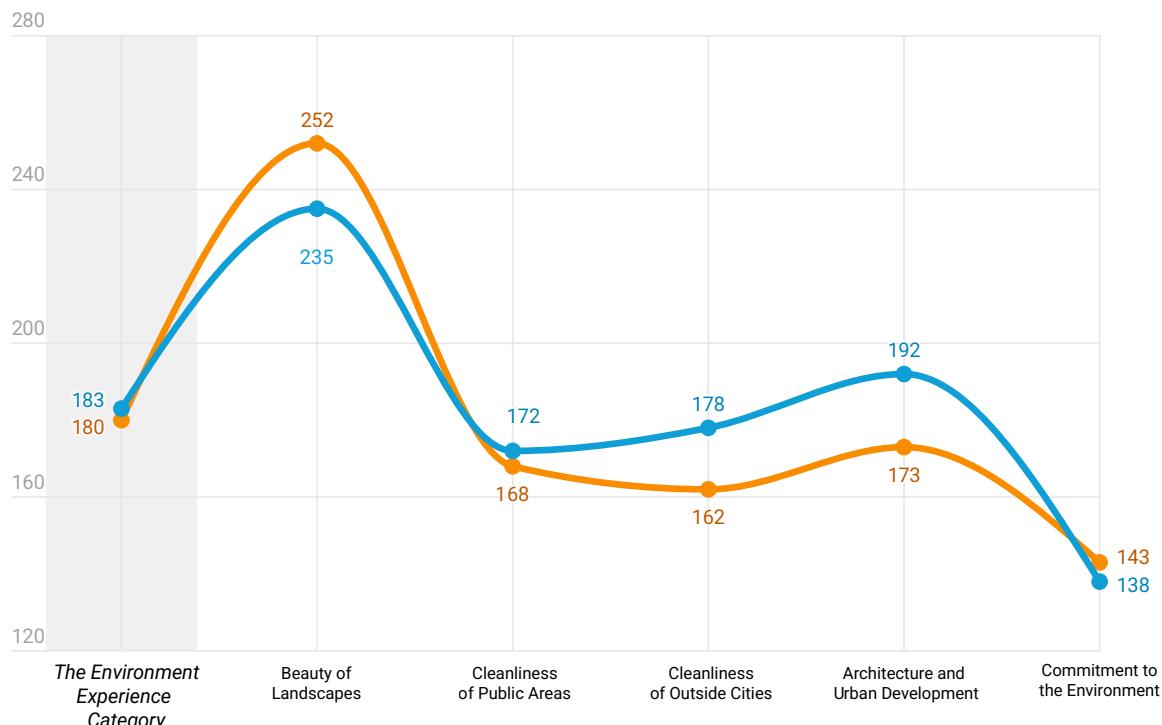
Importance of the Environment. In 2023, 35 percent (11.2 million) of overseas visitors visited National Parks/Monuments, 5 percent (1.7 million) engaged in Camping/Hiking, and four percent (1.1 million) engaged in Environmental/Eco Excursions while traveling in the United States.[15]

- Of the 10 categories in this study, the U.S. Environment Experience score of 183 by overseas visitors was the eighth-highest score, only above the Local Food and the Transportation categories.

- Within the Environment Experience category, high U.S. scores for Beauty of Landscapes (235) and Architecture and urban development (192) offset lower scores for Cleanliness outside cities (178), Cleanliness of public areas (172), and Commitment to the environment (138).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The U.S. had a statistically significant competitive advantage score for the Architecture and Urban Development subcategory (+18) and the Cleanliness Outside Cities subcategory (+16).

- **Competitive:** The United States had a competitive score for the Cleanliness of Public Areas subcategory (+3), the Commitment to the Environment subcategory (-5), as well as for the overall Environment visitor experience category (+3).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Beauty of Landscapes subcategory (-17).

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[15] National Travel and Tourism Office, Survey of International Air Travelers.

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Category 10. The Local Hospitality and Feeling of Safety Experience

Local Hospitality and Safety: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States in the Local Hospitality and Feeling of Safety Visitor experience category are compared to their ratings of benchmark destinations in the same category.

Category and Subcategories		USA	OVS Benchmark	Difference
	Local Hospitality and Feeling of Safety Experience	200	188	12
1	Ease of Communication with Locals	219	165	55
2	Hospitality of Locals	201	202	−1
3	Safety and Feeling of Security	179	197	−18

Local Hospitality and Feeling of Safety: United States vs. Overseas Benchmark

— USA Rating
— Overseas Benchmark Ratings

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STUDY OF INTERNATIONAL VISITOR SATISFACTION OF THE UNITED STATES

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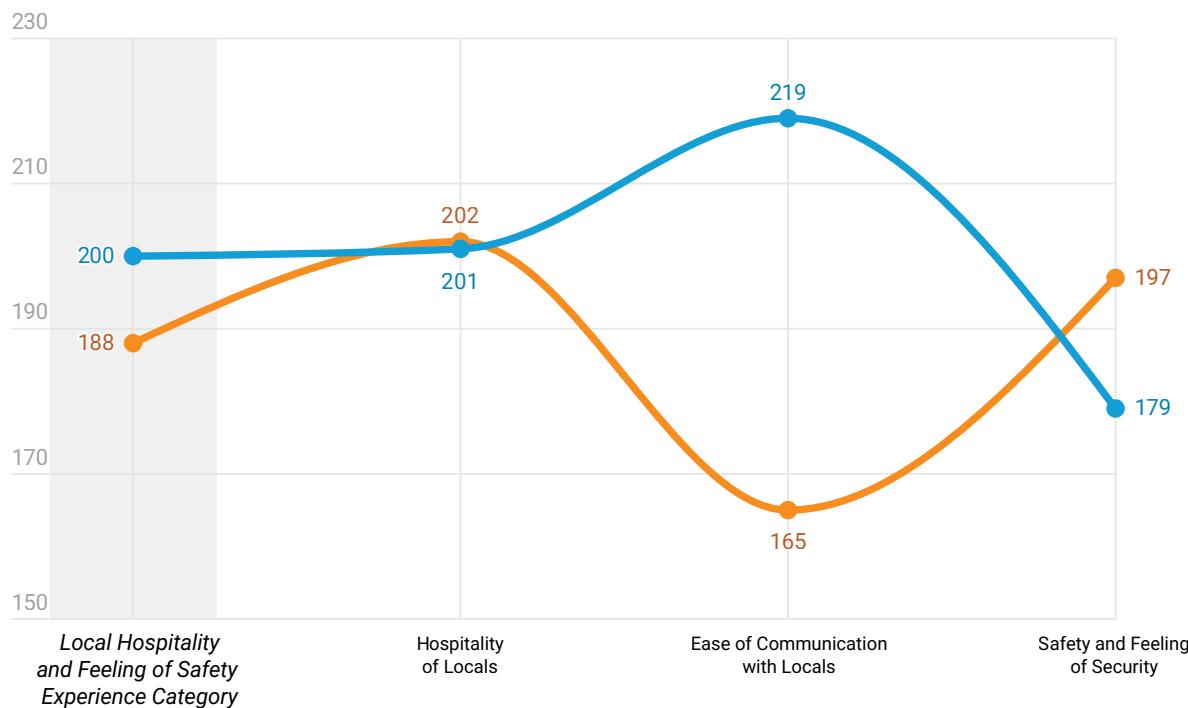
Importance of Local Hospitality and Feeling of Safety. In 2023, Local Hospitality and Feeling of Safety were ranked No.1 and No 3, respectively, in the 'Top Drivers Influencing Visitors Satisfaction'.[16]

- Of the 10 overall categories in this study, the Local Hospitality and Feeling of Safety experience score of 200 by overseas visitors was the sixth-highest score.

- Within the Local Hospitality and Feeling of Safety visitor experience category, high U.S. scores for Ease of Communication with Locals (219), and Hospitality of Locals (201), contrast a lower U.S. score received for Safety and Feeling of Security (179).

United States vs. Overseas Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for the Ease of Communication with Locals subcategory (+55) as well as for the overall Local Hospitality and Feeling of Safety visitor experience category (+12).

- **Competitive:** The United States had a competitive score for the Hospitality of Locals subcategory (-1).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Safety and Feeling of Security subcategory (-18).

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[16] TRAVELSAT Correlation analysis with overall satisfaction. All markets & destinations globally.

D. Canadian and Mexican Visitor Satisfaction in the United States Compared to the Canada–Mexico Benchmark

Category 1: The Accommodation Experience

Accommodation: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Accommodation experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex	Difference
	Accommodation Experience	257	239	18
1	Overall Quality	282	241	41
2	Value for Money	215	205	9
3	Hospitality of Personnel	275	270	4

Accommodation: United States vs. Canada-Mexico Benchmark

- USA Rating
- Canada-Mexico Benchmark Rating
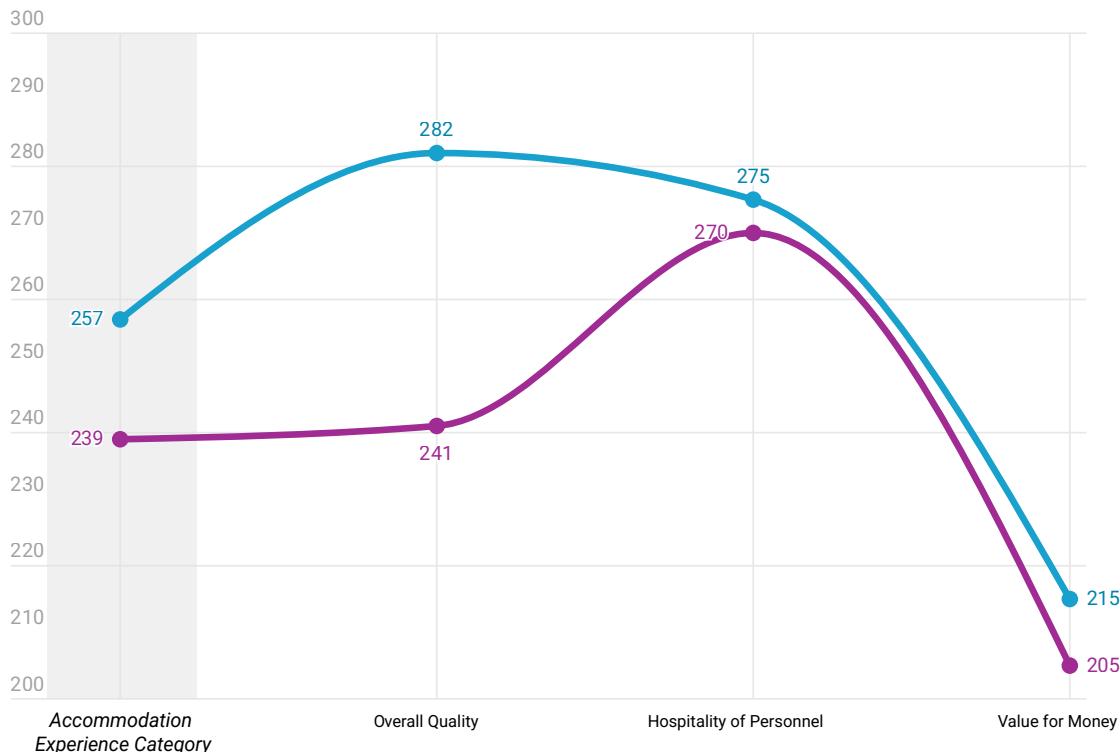
Importance of the Accommodation Experience. In 2023, 74 percent (7.8 million) of Canadian visitors traveling by air, 78 percent (7.7 million) of Canadian visitors traveling via land, and 59 percent (1.8 million) of Mexican visitors traveling via air to the United States reported staying in a hotel or motel while visiting the United States.[17]

- Of the 10 overall visitor experience categories rated in this study, the U.S. Accommodation visitor experience score of 257 by Canadian and Mexican visitors was the third-highest, behind only below Beach and Water, and Historical Heritage.

- Within the Accommodation visitor experience category, the U.S. received high scores for Overall Quality (282) and Hospitality of Personnel (275)—scores that were offset by a lower score in the Value for Money (215) subcategory.

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States received a statistically significant competitive advantage score in the Overall Quality subcategory (+41), and in the overall Accommodation visitor experience category (+18).

- **Competitive:** The United States scored competitively in the Value for Money (+9) and the Hospitality of Personnel (+4) Accommodation experience subcategories.

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[17] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

Category 2: The Local Food Experience

Local Food: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Local Food experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference	
	Local Food Experience	250	222	28	
1	Diversity and Choice	267	204		64
2	Overall Quality	260	233	27	
3	Hospitality of Personnel	275	250	25	
4	Value for Money	199	200	−2	

Local Food: United States vs. Canada-Mexico Benchmark

━━ USA Rating

━━ Canada-Mexico Benchmark Rating

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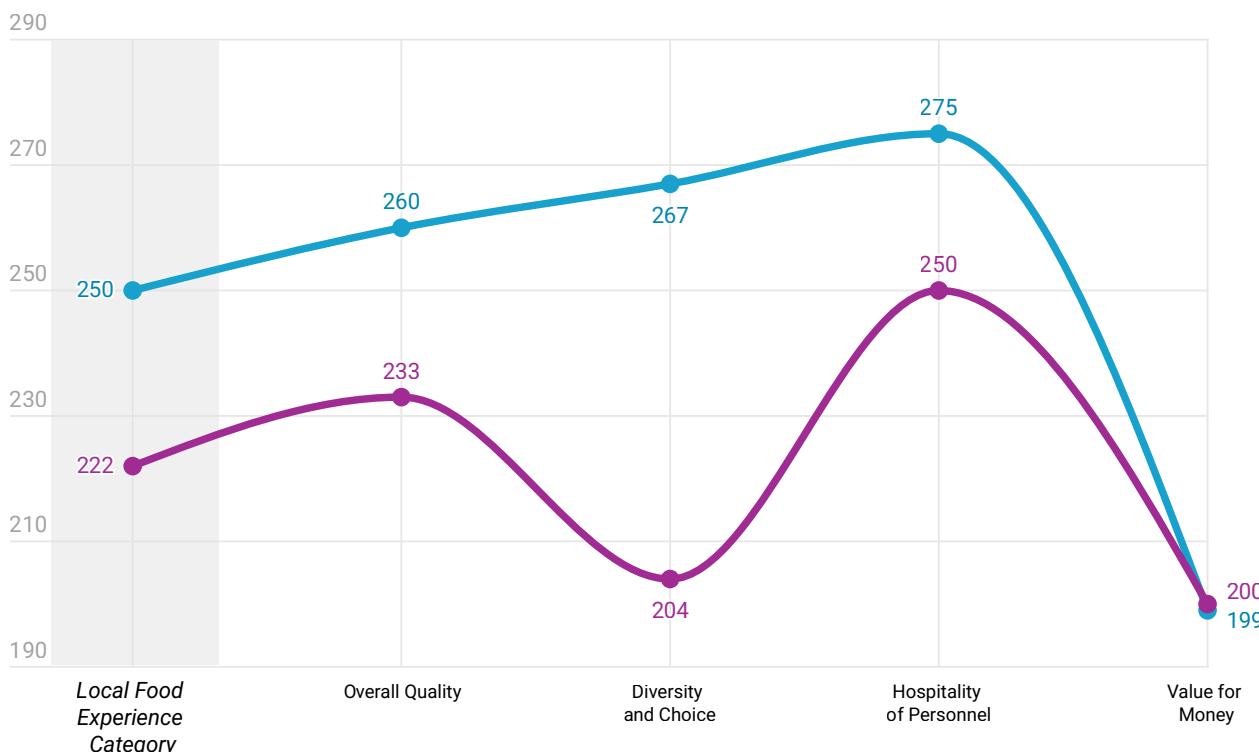
Importance of the Local Food Experience. In 2023, 29 percent (3.1 million) of Canadian travelers by air, 20 percent (1.9 million) of Canadian travelers by land, and 21 percent (629,000) Mexican visitors to the United States by air reported experiencing fine dining while traveling in the United States.[18]

- Of the 10 overall visitor experience categories rated in this study, the Local Food visitor experience category score of 250 by Canadian and Mexican travelers visiting the United States was the third-lowest, only above ratings for Transportation and Tourist Information Centers.

- Within the Local Food experience category, the United States received high scores in the Hospitality of Personnel (275), Diversity and Choice (267), and Overall Quality (260) subcategories, offset by a lower score in Value for Money (199).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States received statistically significant competitive advantage scores in the Overall Quality (+27), Diversity and Choice (+64), and Hospitality of Personnel (+25) categories, as well as the Local Food overall visitor experience category (+28).

- **Competitive:** The United States had a competitive score for the Value for Money subcategory (-2).

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[18] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

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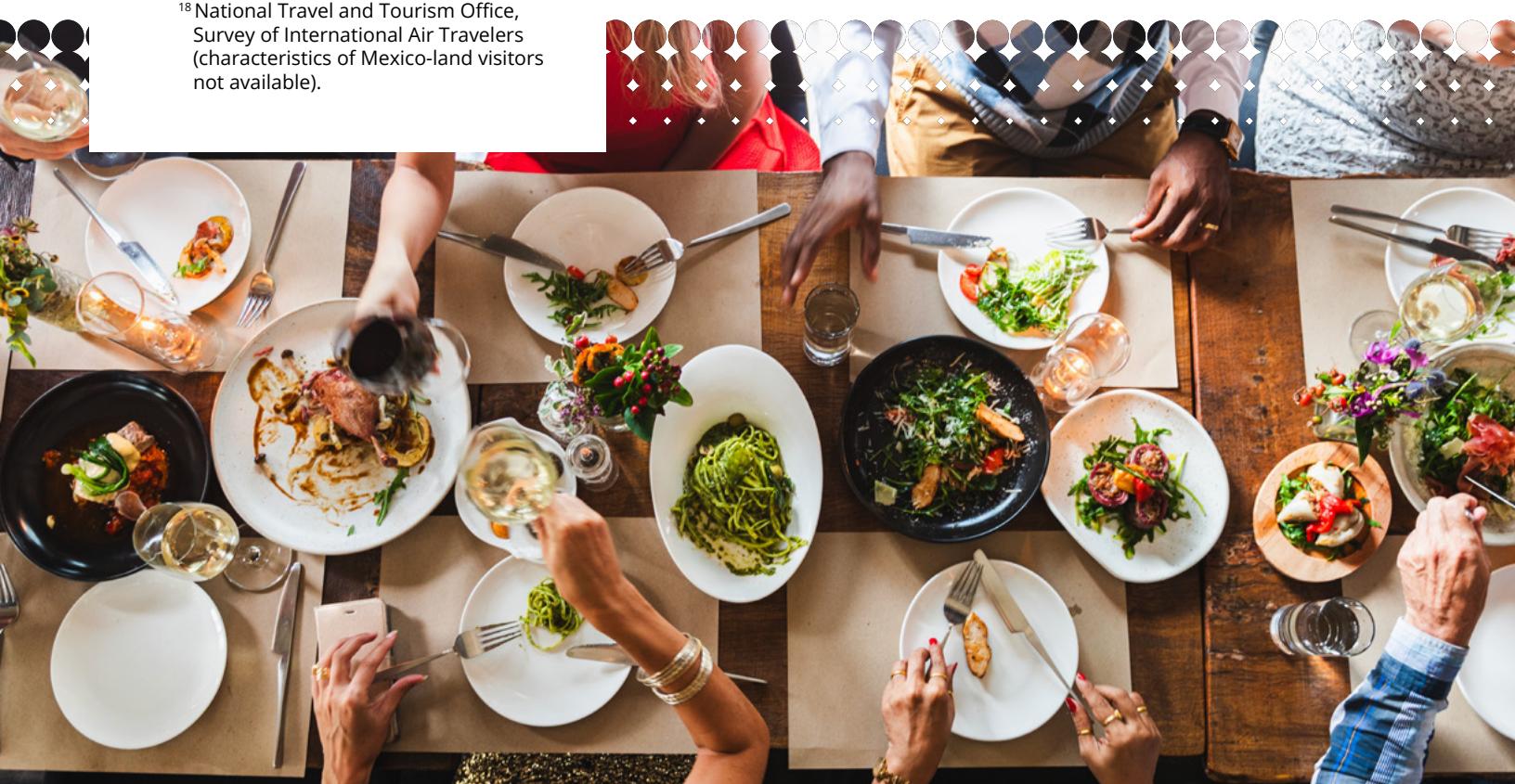
Category 3: Transportation Experience

Transportation: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Transportation visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference	
	Transportation Experience	**232**	**202**		30
1	Parking Convenience	213	106		107
2	Ease of Finding Your Way Using Signage	256	195		61
3	Transportation Infrastructure (i.e., roads)	261	203		59
4	Hospitality at Entry Point	249	191		58
5	Taxi Service	222	185		37
6	Cost of Transportation to Reach Destination	184	156		22
7	Access to/from the airport	265	245		20
8	Hospitality of Public Transit Personnel	212	221		−8
9	Price of Public Transportation	226	239		−13
10	Accessibility of Public Transportation	231	275		−44

Transportation: United States vs. Canada-Mexico Benchmark

Industry & Analysis
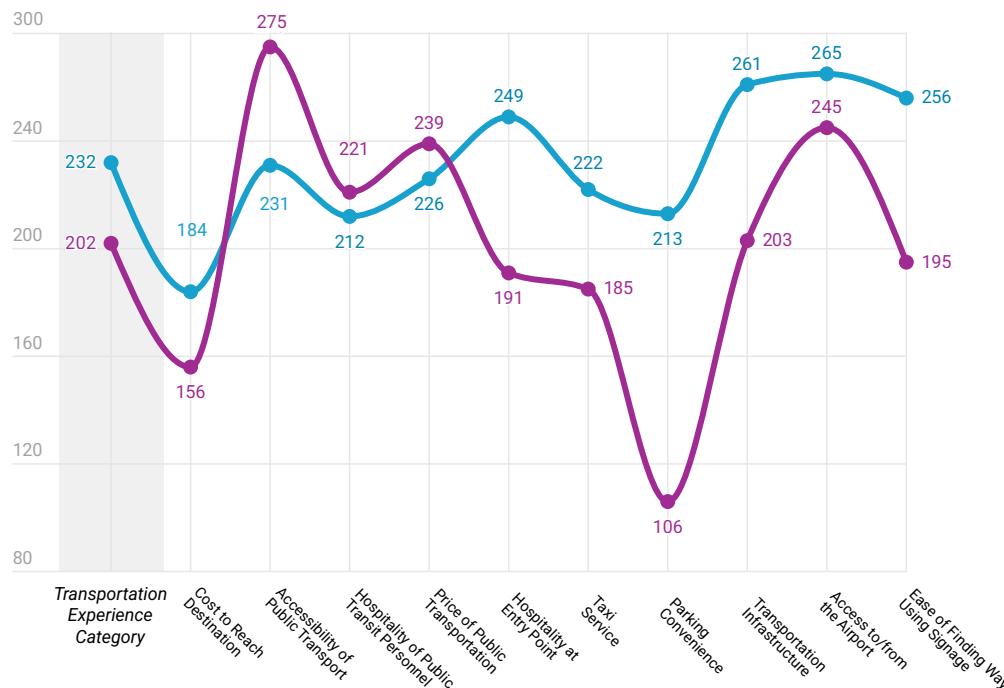
Importance of Transportation: In 2023, 36 percent (3.8 million) of Canadian visitors who traveled to the United States by air reported using ride-sharing services, 19 percent (558,000) of Mexican visitors to the United States by air reported using air travel between U.S. cities, and 76 percent (7.5 million) of Canadian U.S. visitors by land reported using a private or company auto while traveling in the United States.

- Of the 10 visitor experience categories rated in this study, the U.S. Transportation experience score of 232 by Canadian and Mexican visitors was the lowest score.

- Within the Transportation visitor experience category, high U.S. scores for Access to/from the Airport (265), Transportation Infrastructure (261), Ease of Finding Way Using Signage (256), and Hospitality at Entry Point (249), offset lower U.S. scores for Accessibility of Public Transit (231), Price of Public Transit (226), Taxi Service (222), Parking Convenience (213), and Hospitality of Personnel on Public Transport (212), and Cost of Transportation to Reach the Destination (184).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States had statistically significant competitive advantage scores for 7 of the 10 Transportation visitor experience subcategories as compared to the CanMex Benchmark: Parking Convenience (+107), Ease of Finding Your Way Using Signage (+61), Transportation Infrastructure (+59), Hospitality at Entry Point (+58), Taxi Service (+37), Cost of Transportation to Reach the Destination (+28), and Access to/from the Airport (+20), as well as the overall Transportation visitor experience category (+30).

- **Competitive:** The United States had a competitive score for the Hospitality of Public Transit Personnel subcategory (-8).

- **Competitive Disadvantage:** The United States received statistically significant competitive disadvantage scores for the Price of Public Transit subcategory (-13) and the Accessibility of Public Transit (-44) subcategories.

Category 4. The Culture and Leisure Experience

## Culture and Leisure: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Culture and Leisure visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	Can-Mex Benchmark	Difference
	Culture and Leisure Experience	256	221	35
1	Nightlife	275	205	70
2	Amusement and Theme Parks	329	270	59
3	Theater, Opera, and Cultural Shows	246	204	42
4	Diversity and Range	272	252	20
5	Guided Tours	255	237	18
6	Price of Leisure Activities	159	157	2

Culture and Leisure: United States vs. Canada-Mexico Benchmark

— USA Rating
— Canada-Mexico Benchmark Rating
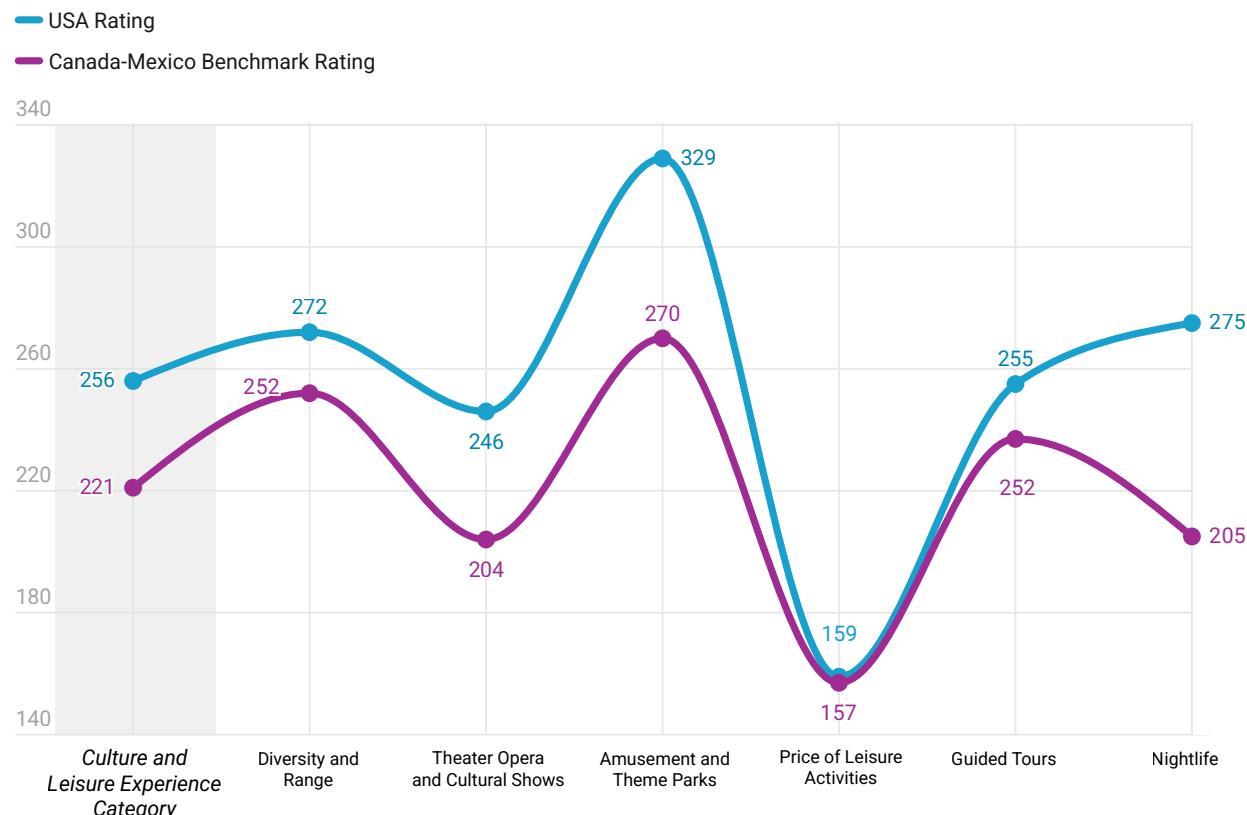
Importance of Culture and Leisure. In 2023, 20 percent (2.1 million) of Canadian travelers to the United States by air, 11 percent (1.1 million) of Canadian travelers by land, and 29 percent (886,000) of Mexican travelers by air reported going to an amusement or theme park while visiting the United States.[19]

- Of the 10 overall visitor experience categories rated in this study, the Culture and Leisure score of 256 by Canadian and Mexican visitors in the United States tied for fourth-highest, only behind the Beach and Water, Historical Heritage, and Accommodation categories.

- Within the Culture and Leisure visitor experience category, the United States received high scores for Amusement and Theme Parks (329), Nightlife (275), and Diversity and Range (272), offset by lower scores for Guided Tours (255), Theater, Opera, and Cultural Shows (246), and Price of Leisure Activities (159).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States had a statistically significant comparative advantage score in five of the six Culture and Leisure experience subcategories: Nightlife (+70), Amusement and Theme Parks (+59), Theater, Opera, and Cultural Shows (+42), Diversity and Range (+20), and Guided Tours (+18), as well as in the overall Culture and Leisure visitor experience category (+35).

- **Competitive:** The United States scored competitively in for the Price of Leisure Activities subcategory (+2).

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[19] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

Category 5: The Shopping Experience

Shopping: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Shopping visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference
	Shopping Experience Category	254	193	60
1	Range of Shopping Possibilities	299	210	90
2	Hours/Days of Operation	276	186	90
3	Hospitality of Personnel	258	210	47
4	Value for Money	201	155	46
5	Quality of Handicrafts and Souvenirs	234	206	29

Shopping: United States vs. Canada-Mexico Benchmark

— USA Rating
— Canada-Mexico Benchmark Rating
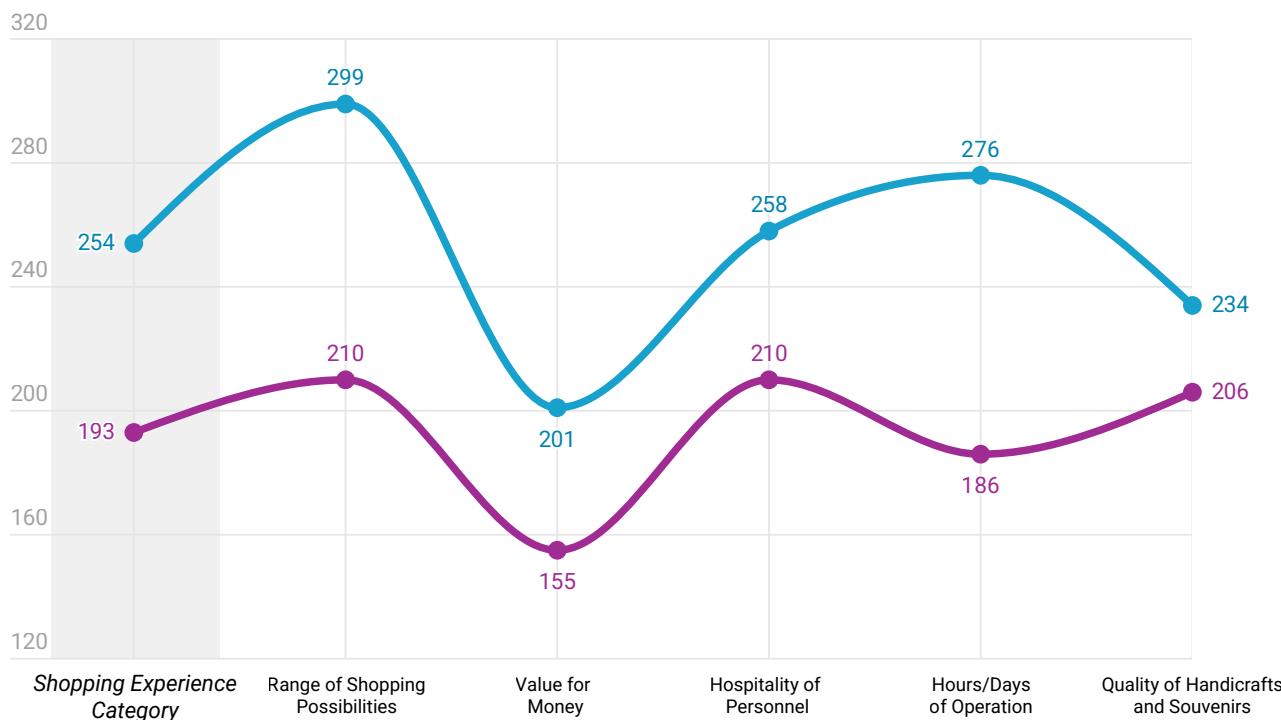
Importance of Shopping. In 2023, 70 percent (7.4 million) of Canadian travelers to the United States by air, 27 percent (2.6 million) of Canadian travelers by land, and 80 percent (2.4 million) of Mexican visitors to the United States by air reported shopping while visiting the United States.[20]

- Of the 10 categories in this study, the U.S. Shopping experience score of 254 by Canadian and Mexican visitors was the sixth-highest score.

- Within the Shopping visitor experience category, high U.S. scores for Range of Shopping Possibilities (299), Hours/Days of Operation (276), and Hospitality of Personnel (258) offset lower scores for Quality of Handicrafts and Souvenirs (234), and Value for Money (201).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States received scores indicating relative competitive advantage in all Shopping experience subcategories: the Range of Shopping Possibilities (+90), Hours/Days of Operation (+90), Hospitality of Personnel (+47), Value for Money (+46), and Quality of Handicrafts and Souvenirs (+29), as well as in the overall Shopping visitor experience category (+60).

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[20] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

Category 6: The Historical Heritage Experience

Historical Heritage: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Historical Heritage visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference
	Historical Heritage Experience	280	292	−12
1	Hospitality of Personnel	312	308	4
2	Convenience of Visiting Popular Tourist Attraction and Crowdedness	249	251	−2
3	Entrance Fees	239	242	−3
4	Management and Maintenance	290	316	−25
5	Diversity and Range	311	344	−33

Historical Heritage: United States vs. Canada-Mexico Benchmark

— USA Rating

— Canada-Mexico Benchmark Rating
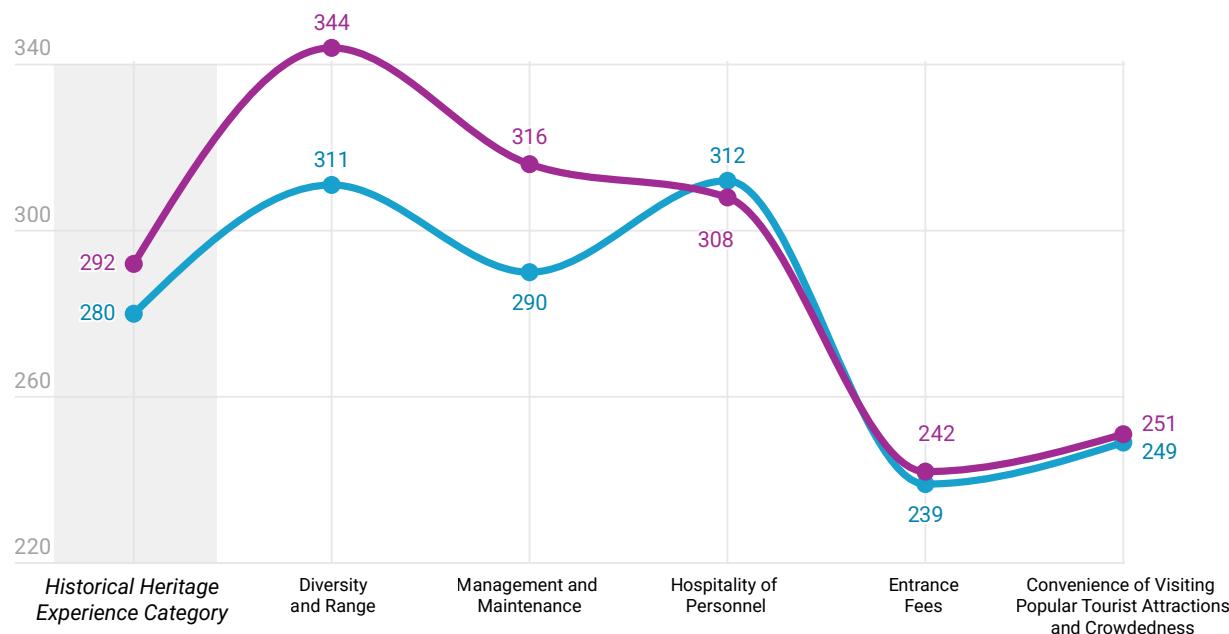
Importance of Historical Heritage. In 2023, 17 percent (1.8 million) of Canadian visitors who traveled to the United States by air, 12.1 percent (1.2 million) of Canadian travelers to the United States by land, and 18.3 percent (551,000) of Mexican visitors to the United States by air reported visiting a historic location while traveling in the United States.[21]

- Of the 10 categories in this study, the U.S. Historical Heritage experience score of 280 by Canadian and Mexican visitors was the second-highest score.

- Within the Historical Heritage experience category, high U.S. scores for Hospitality of Personnel (312), Diversity and Range (311), and Management and Maintenance (290) offset lower U.S. scores for Convenience of Visiting Popular Tourist Attractions and Crowdedness (249), and Entrance Fees (239).

United States vs. Canada-Mexico Benchmark

- **Competitive:** The United States scored competitively in three out of five subcategories: Hospitality of Personnel (+4), Convenience of Visiting Popular Tourist Attractions and Crowdedness (-2), and Entrance Fees (-3).

- **Competitive Disadvantage:** The United States had statistically significant competitive disadvantage scores for two of the five subcategories: Diversity and Range (-33) and Management and Maintenance (-25)—as well as in the overall Historical Heritage experience category (-12).

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[21] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

Category 7: The Tourist Information Center Experience

Tourist Info Centers: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Tourist Information Centers visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference
	Tourist Information Centers Experience	247	183	63
1	Smartphone Application	254	177	77
2	Number of Information Centers	227	159	68
3	Hours/Days of Operation	260	197	62
4	Efficiency of Personnel	246	201	46

Tourist Info Centers: United States vs. Canada-Mexico Benchmark

— USA Rating

— Canada-Mexico Benchmark Rating
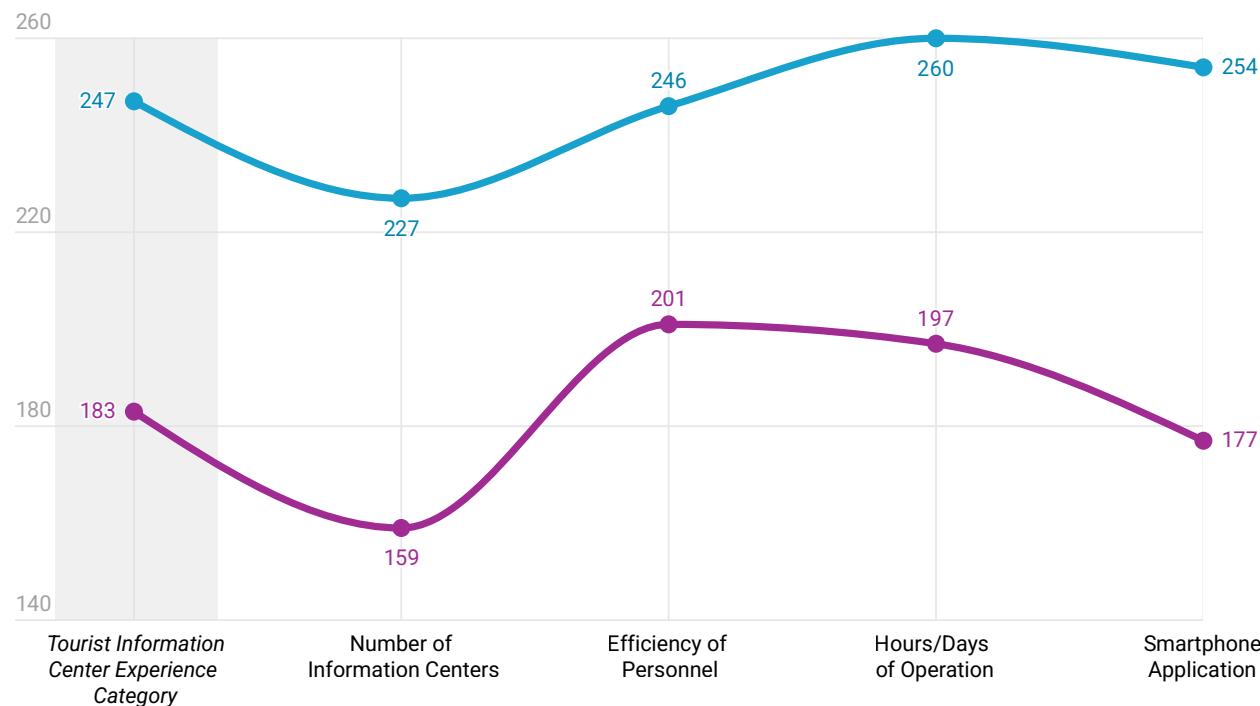
Importance of Tourist Information Centers: Tourist information centers serve an important role in managing visitor volume, promoting lesser-known attractions and events, and providing a comprehensive overview of a destination's offerings

- Of the 10 visitor experience categories rated in this study, the U.S. Tourist Information Centers visitor experience score of 247 by Canadian and Mexican visitors was second-lowest score, only above Transportation.

- Within the Tourist Information Centers experience category, high U.S. scores in the Hours/ Days of Operation (260), and Smartphone Application (254) subcategories offset lower U.S. scores for Efficiency of Personnel (246), and Number of Information Centers (227).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States received statistically significant competitive advantage scores in every Tourist Information Centers experience subcategory: Smartphone Application (+77), Number of Information Centers (+68), Hours/Days of Operation (+62), and Efficiency of Personnel (+46)—as well as the overall Tourist Information Centers experience category (+63).

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Category 8: The Beaches and Water Experience

Beach and Water: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Beach and Water visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference
	Beach and Water Experience	317	255	62
1	Water Activities	306	210	96
2	Cleanliness and Upkeep	327	235	92
3	Safety for Swimming	308	255	53
4	Beauty of Beach	344	308	36
5	Diversity and Range	299	268	31

Beach and Water: United States vs. Canada-Mexico Benchmark

- USA Rating
- Canada-Mexico Benchmark Rating
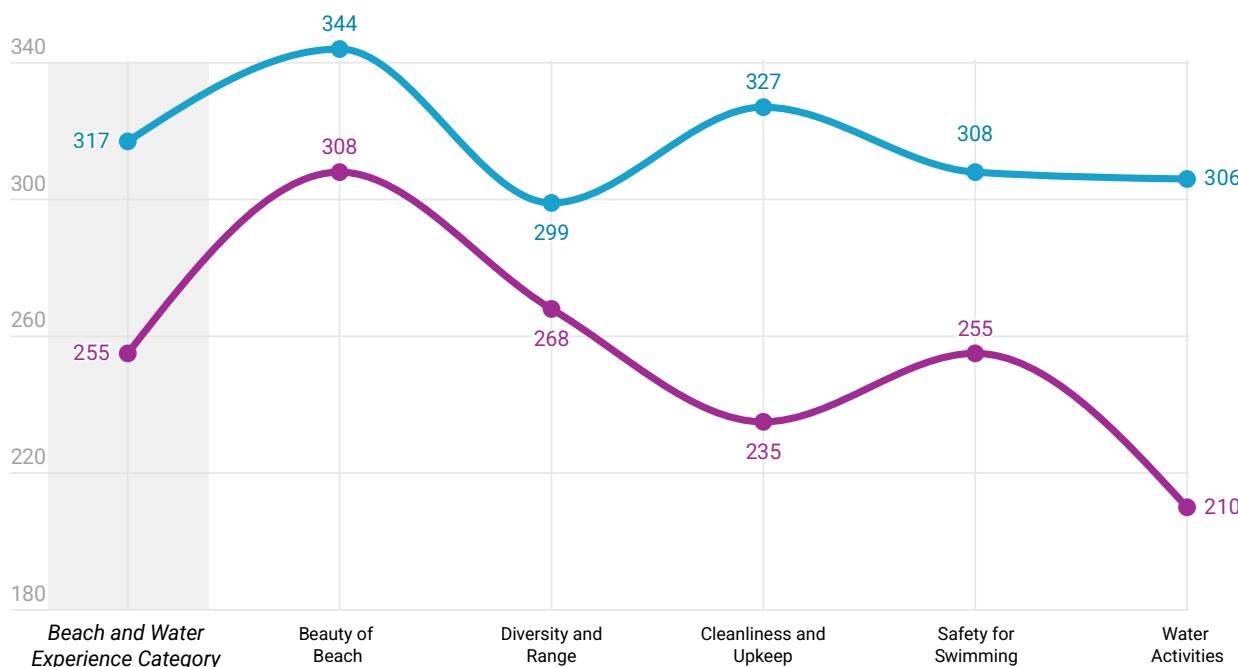
Importance of Beach and Water. In 2023, 5.2 percent (549,000) of Canada-air, 8 percent (784,000) of Canada-land, and 1.9 percent (57,000) of Mexico-air visitors to the United States engaged in water sports while traveling in the United States.[22]

- Of the 10 categories in this study, the U.S. Beach and Water experience score of 317 by Canadian and Mexican visitors was the highest score.

- Within the Beach and Water experience category, high U.S. scores for Beauty of Beach (344) and Cleanliness and Upkeep (327) offset lower scores for Safety for Swimming (308), Water Activities (306), and Diversity and Range (299).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States had statistically significant competitive advantage scores for all of the Beach and Water subcategories: Water Activities (+96), Cleanliness and Upkeep (+92), Safety for Swimming (+53), Beauty of Beach (+36), and Diversity and Range (+31), as well as the overall Beach and Water visitor experience category (+62).

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[22] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

Industry & Analysis
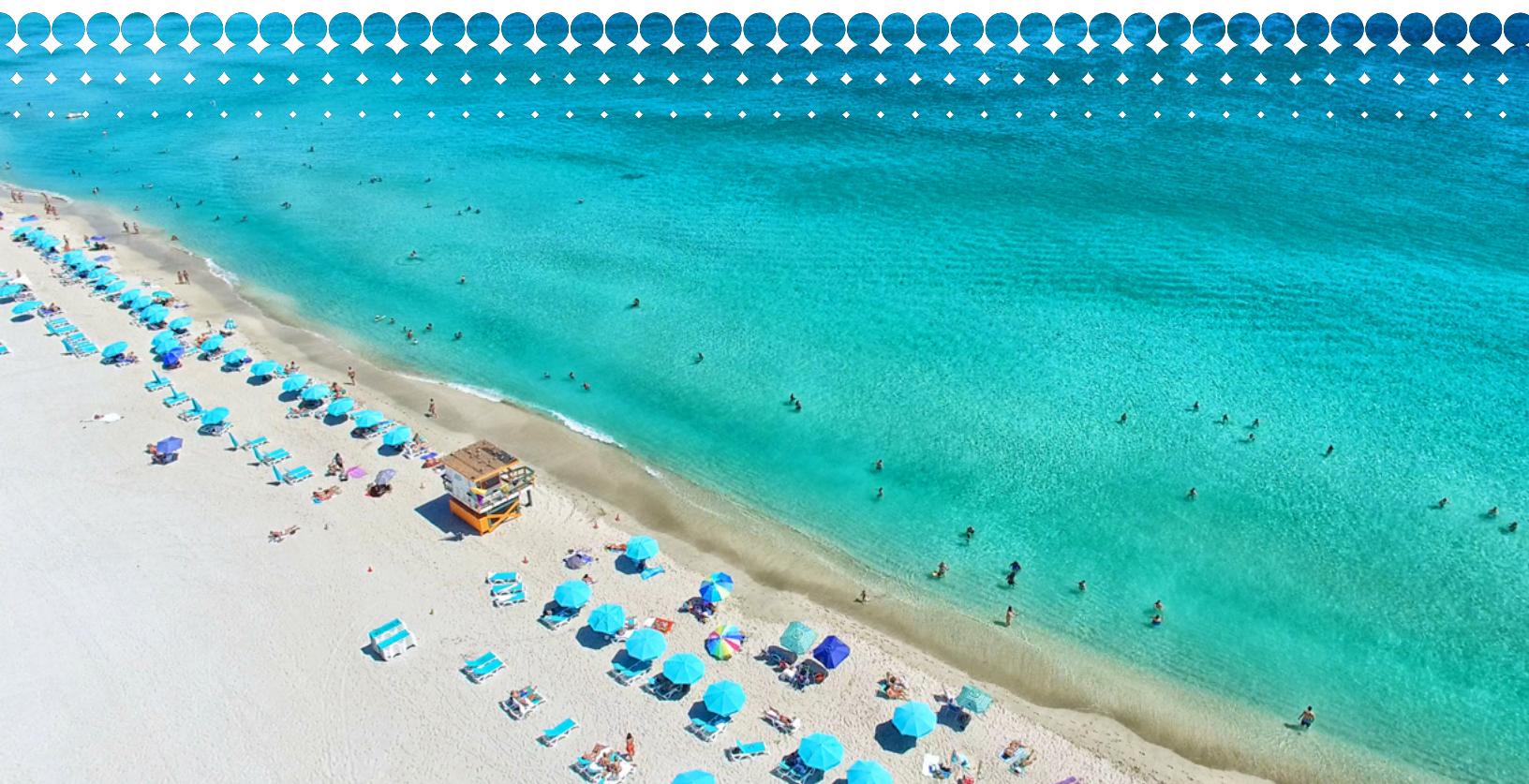
Category 9: The Environment Experience

The Environment: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Environment visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference
	The Environment Experience	251	240	11
1	Cleanliness Outside Cities	259	216	43
2	Cleanliness of Public Areas	236	203	33
3	Architecture and Urban Development	256	234	22
4	Commitment to the Environment	222	231	−9
5	Beauty of Landscapes	283	315	−32

The Environment: United States vs. Canada-Mexico Benchmark

— USA Rating
— Canada-Mexico Benchmark Rating
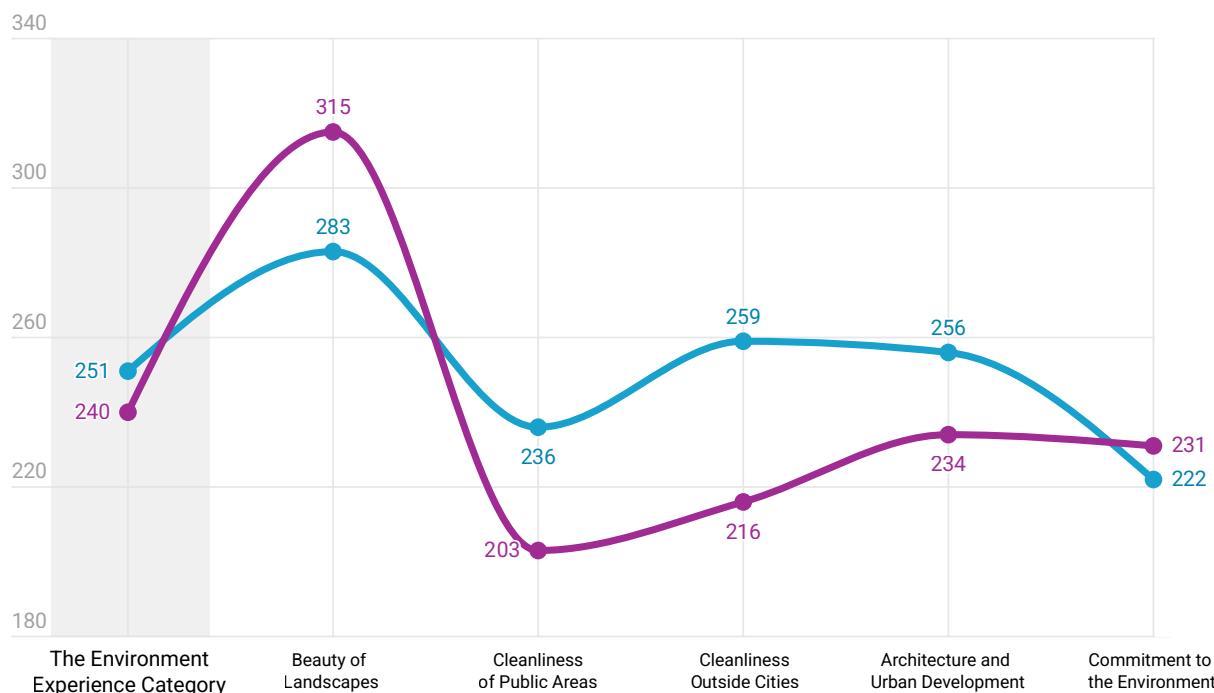
Importance of the Environment. In 2023, 19.8 percent (2.1 million) of Canada-air, 23 percent (2.2 million) of Canada-land, and 24.8 percent (749,000) of Mexico-air visitors to the United States went to a National Park while traveling in the United States.[23]

- Of the 10 categories in this study, the U.S. Environment experience score of 251 by Canadian and Mexican visitors was the seventh-highest score, only above Local Food, Tourist Information Centers, and Transportation.

- Within the overall Environment visitor experience category, high U.S. scores for Beauty of Landscapes (283), Cleanliness Outside Cities (259), and Architecture and Urban Development (256) offset lower scores for Cleanliness of Public Areas (236) and Commitment to the Environment (222).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States had statistically significant competitive advantage scores for 3 of the 5 Environment subcategories: Cleanliness Outside Cities (+43), Cleanliness of Public Areas (+33), and Architecture and Urban Development (+22) as well as the overall Environment experience category (+11).

- **Competitive:** The United States had a competitive score for the Commitment to the Environment subcategory (-9).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Beauty of Landscapes subcategory (-32).

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[23] National Travel and Tourism Office, Survey of International Air Travelers (characteristics of Mexico-land visitors not available).

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Category 10: Local Hospitality and Feeling of Safety Experience

Local Hospitality and Feeling of Safety: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States in the Local Hospitality and Feeling of Safety visitor experience category are compared to their ratings of benchmark destinations in the same category.

	Category and Subcategories	USA	CanMex Benchmark	Difference	
1	Local Hospitality and Feeling of Safety Experience	256	239		16
2	Ease of Communication with Locals	276	211		65
3	Safety and Feeling of Security	237	242	−5	
4	Hospitality of Locals	254	265	−11	

Local Hospitality and Feeling of Safety: United States vs. Canada-Mexico Benchmark

— USA Rating
— Canada-Mexico Benchmark Rating

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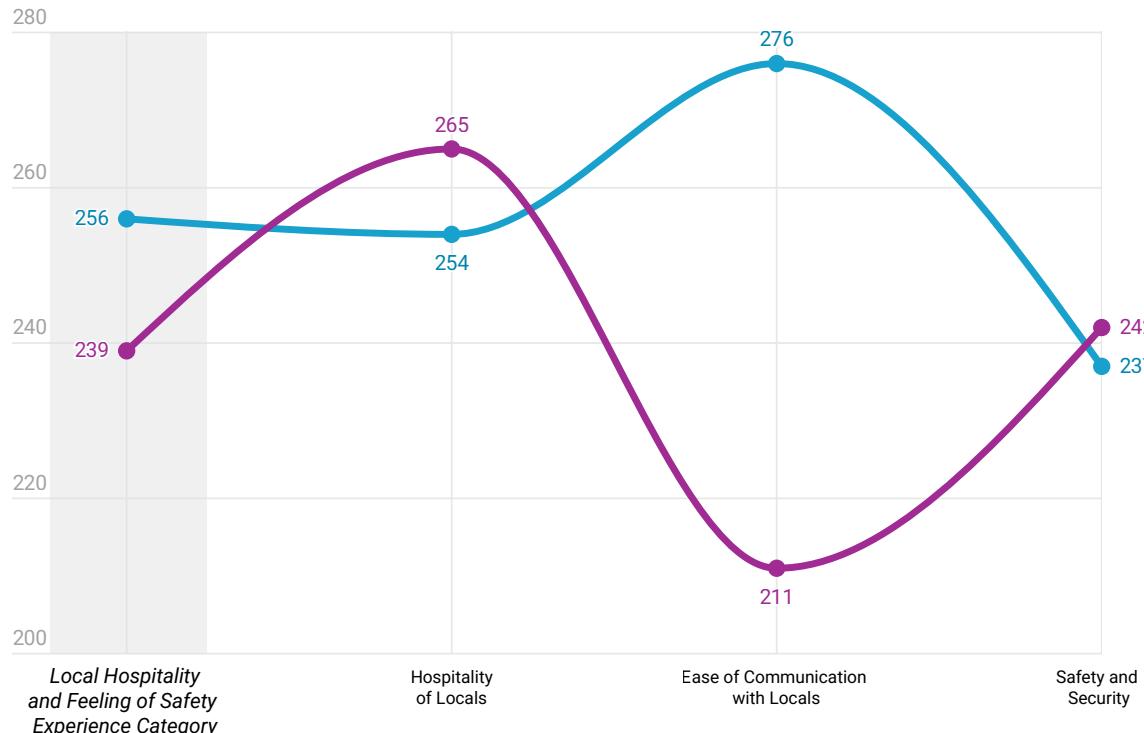
Importance of Local Hospitality and Feeling of Safety. In 2023, Local Hospitality and Feeling of Safety ranked first and third, respectively, among the top drivers influencing visitor satisfaction.[24]

- Of the 10 categories in this study, the Local Hospitality and Feeling of Safety experience score of 256 by Canadian and Mexican visitors was tied for the fourth-highest score.

- Within the Local Hospitality and Feeling of Safety experience category, a high U.S. score for Ease of Communication with Locals (276) offset lower scores for Hospitality of Locals (254) and Safety and Feeling of Security (237).

United States vs. Canada-Mexico Benchmark

- **Competitive Advantage:** The United States had a statistically significant competitive advantage score for 1 of the 3 Local Hospitality and Feeling of Safety subcategories: Ease of Communication with Locals (+65). Additionally, the United States scored a statistically significant competitive advantage score in the overall Local Hospitality and Feeling of Safety visitor experience category (+16).

- **Competitive:** The United States had a competitive score for the Safety and Feeling of Security subcategory(-5).

- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Hospitality of Locals subcategory (-11).

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[24] TRAVELSAT Correlation analysis with overall satisfaction. All markets & destinations globally.

E. Key Performance Indicators

Key Performance Indicators: United States vs. Overseas Benchmark

Overseas visitors' ratings of the United States using key performance indicators (KPIs) are compared to their ratings of benchmark destinations using the same KPIs.

	Category and Subcategories	USA	OVS Benchmark	Difference
	General KPI Score	114	116	−3
1	Intention to Repeat Visit	67	51	16
2	Overall Fulfillment of Expectations	201	200	1
3	Intention to Recommend (Net Promoter Score)	47	46	1
4	Overall Value for Money	139	169	−29

Key Performance Indicators: United States vs. Overseas Benchmark
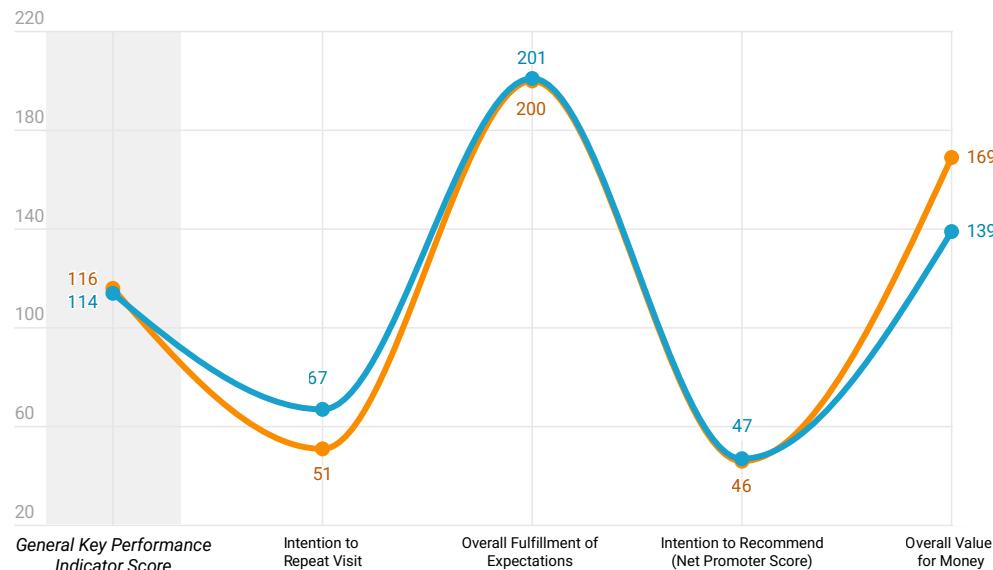
- **Competitive Advantage:** The United States received a statistically significant competitive advantage score when compared to the Overseas Benchmark in 1 of 4 General Key Performance Indicator Score subcategories: Intention to Repeat Visit (+16).

- **Competitive:** The United States was competitive in 2 of the 4 KPI subcategories: Overall Fulfillment of Expectations (+1), and Intention to Recommend/Net Promoter Score (+1), as well as in the General KPI score (-3).

- **Competitive Disadvantage:** The United States received a statistically significant competitive disadvantage score in 1 of 4 KPI components: Overall Value for Money (-29).

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Key Performance Indicators: United States vs. Canada-Mexico Benchmark

Canadian and Mexican visitors' ratings of the United States using key performance indicators (KPIs) are compared to their ratings of benchmark destinations using the same KPIs.

	Category and Subcategories	USA	CanMex Benchmark	Difference
	General KPI Score	146	140	6
1	Intention to Repeat Visit	74	50	24
2	Overall Value for Money	214	209	5
3	Overall Fulfillment of Expectations	239	235	4
4	Intention to Recommend (Net Promoter Score)	58	66	−8

Key Performance Indicators: United States vs. Canada-Mexico Benchmark
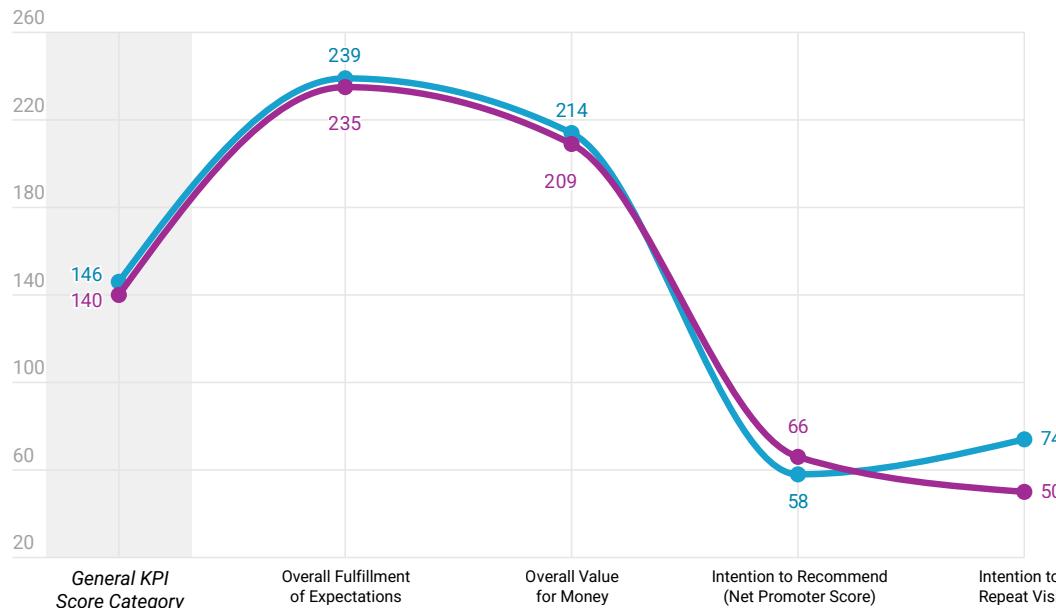
- **Competitive Advantage:** The United States had a statistically significant competitive advantage score when compared to the CanMex Benchmark for 1 out of 4 General KPI subcategories: Intention to Repeat Visit (+24).

- **Competitive:** The United States was rated competitively in 3 out of 4 KPI subcategories: Intention to Recommend/Net Promoter Score (-8), Overall Fulfillment of Expectations (+4), and Overall Value for Money (+5), in addition to the General KPI score (+6).

F. U.S. Market Competitive Advantages, Competitiveness, and Disadvantages Compared to Overseas Benchmark

United States vs. OVS Benchmark: Compared to the other major international long-haul destinations visited by travelers of the United States' top overseas source markets, the United States:

- Had a competitive advantage in half (25) of the 50 subcategories across all 10 visitor experience categories;
- Was competitive in 16 subcategories; and
- Had a competitive disadvantage in 9 subcategories.

Competitive Advantage. The 25 components where the United States had a competitive advantage spanned 9 of the 10 overall visitor experience categories:

- Culture and Leisure (5 components)
- Shopping (4), Beach and Water (4), and Tourist Information Centers (4)
- Transportation (3)
- Environment (2)
- Historical Heritage (1), Accommodation (1), and Local Hospitality and Feeling of Safety (1)

The United States did not have a competitive advantage in any subcategory within the local food experience category.

The top 6 subcategories where the United States had the greatest comparative advantage spanned 4 different overall visitor experience categories:

- +69 points: Range of Shopping Possibilities (Shopping)
- +55 points: Ease of Communication with Locals (Local Hospitality and Feeling of Safety)
- +54 points: Amusement and Theme Parks (Culture and Leisure)
- +51 points: Hours/Days of Operation (Shopping)
- +48 points: Smartphone Application (Tourist Information Centers)
- +46 points: Hours/Days of Operation (Tourist Information Centers)

Competitive. The 16 subcategories where the United States was competitive spanned 8 of the10 overall visitor experience categories:

- Transportation (5 components)
- Historical Heritage (3)
- Local Food (2) and the Environment (2)
- Beach and Water (1), Shopping (1), Local Hospitality and Feeling of Safety (1), and
- Accommodation (1)

The United States did not have a competitive score in any component within the following categories: Tourist information centers and Culture & Leisure.

The four subcategories where the United States was competitive and closest to having a competitive advantage:

- +7 points: Entrance Fees (Historical Heritage)

- +6 points: Hospitality of Personnel (Historical Heritage)

- +4 points: Access to/from the Airport (Transportation)

- +3 points: Cleanliness of Public Areas (Environment)

The four subcategories where the United States was competitive and closest to having a competitive disadvantage:

- -3 points: Taxi Service (Transportation)

- -5 points: Commitment to the Environment (Environment)

- -8 points: Accessibility of Public Transit (Transportation)

- -10 points: Hospitality of Personnel (Local Food)

Competitive Disadvantage. The 9 subcategories where the United States had a competitive disadvantage spanned 7 of the 10 overall visitor experience categories:

- Transportation (2 subcategories); Accommodation (2); Culture and Leisure (1); Local Hospitality and Feeling of Safety (1); Environment (1); Historical Heritage (1); and Accommodation (1).

The United States did not have a competitive disadvantage in any subcategory within the following categories: Shopping, Tourist Information Centers, and Beach and Water.

The term "price," "cost," or "value for money" was included in the description of 5 of the 9 components where the United States had a competitive disadvantage:

- -10 points: **Cost** of Transportation to Reach the Destination (Transportation)

- -11 points: **Price** of Leisure Activities (Culture and Leisure)

- -12 points: **Price** of Public Transit (Transportation)

- -16 points: **Value for Money** (Accommodation)

- -35 points: **Value for Money** (Local Food)

Of the subcategories not related to "price," "cost," or "value for money," the 4 components where the United States had a competitive disadvantage were:

- -17 points: Beauty of Landscapes (Environment)

- -18 points: Safety and Feeling of Security (Local Hospitality and Feeling of Safety)

- -19 points: Overall Quality (Local Food)

- -29 points: Diversity and Range (Historical Heritage)

Table 3 lists the scores between United States and Overseas Benchmark into the following groupings for all subcategories across all Visitor Experience Categories: Competitive Advantage, Competitive, and Competitive Disadvantage.

U.S. Competitiveness: The United States vs. OVS Benchmark

Overseas visitors' ratings of the United States are compared with their ratings of benchmark destinations in the same categories. In the following subcategories, overseas visitor satisfaction scores are 10 points or more above the OVS Benchmark, indicating U.S. competitive advantage.

Where the U.S. has a Competitive Advantage: United States vs. Overseas Benchmark

Subcategories where the U.S. market score is at least 10 points higher than the Overseas benchmark score

	Subcategory (Category)	USA	OVS Benchmark	Difference
1	Range of Shopping Possibilities (Shopping)	262	193	69
2	Ease of Communication with Locals (Local Hospitality and Feeling of Safety)	219	165	55
3	Amusement and Theme Parks (Culture and Leisure)	302	248	54
4	Hours/Days of Operation (Shopping)	239	188	51
5	Smartphone Application (Tourist Information Centers)	196	147	48
6	Hours/Days of Operation (Tourist Information Centers)	207	161	46
7	Theater, Opera, and Cultural Shows (Culture and Leisure)	208	168	40
8	Efficiency of Personnel (Tourist Information Centers)	192	153	39
9	Hospitality of Personnel (Shopping)	206	170	36
10	Nightlife (Culture and Leisure)	198	164	35
11	Transportation Infrastructure (Transportation)	194	161	33
12	Cleanliness and Upkeep (Beach and Water)	253	221	32
13	Number of Information Centers (Tourist Information Centers)	182	151	31
14	Diversity and Range (Culture and Leisure)	239	210	29
15	Water Activities (Beach and Water)	242	217	25
16	Convenience of Visiting Popular Tourist Attractions and Crowdedness (Historical Heritage)	193	168	24
17	Safety for Swimming (Beach and Water)	246	223	23
18	Value for Money (Shopping)	155	134	21
19	Ease of Finding Your Way Around Using Signage (Transportation)	182	162	20
20	Parking Convenience (Transportation)	142	122	20
21	Guided Tours (Culture and Leisure)	201	182	18
22	Architecture and Urban Development (Environment)	192	173	18
23	Cleanliness of Outside Cities (Environment)	178	162	16
24	Overall Quality (Accommodation)	234	221	13
25	Diversity and Range (Beach and Water)	247	235	12

Where the U.S. Remains Competitive: United States vs. Overseas Benchmark

Subcategories where the U.S. market score is within ± 10 points of the Overseas Benchmark score

	Subcategory (Category)	USA	OVS Benchmark	Difference
1	Entrance Fees (Historical Heritage)	157	151	7
2	Hospitality of Personnel (Historical Heritage)	223	218	6
3	Access to/from the Airport (Transportation)	202	198	4
4	Cleanliness of Public Areas (Environment)	172	168	3
5	Diversity and Choice (Local Food)	189	187	2
6	Hospitality of Public Transit Personnel (Transportation)	162	160	2
7	Beauty of Beach (Beach and Water)	281	280	1
8	Quality of Handicrafts and Souvenirs	163	163	0
9	Hospitality at Entry Point (Transportation)	168	168	0
10	Hospitality of Locals (Local Hospitality and Feeling of Safety)	201	202	−1
11	Management and Maintenance (Historical Heritage)	227	229	−2
12	Hospitality of Personnel (Accomodation)	221	224	−3
13	Taxi Service (Transportation)	149	152	−3
14	Commitment to the Environment (Environment)	138	143	−5
15	Accessibility of Public Transit (Transportation)	195	204	−8
16	Hospitality of Personnel (Local Food)	200	210	−10

Where the U.S. Has a Competitive Disadvantage: United States vs. Overseas Benchmark

Subcategories where the U.S. market score is at least 10 points fewer than the Overseas Benchmark

	Subcategory (Category)	USA	OVS Benchmark	Difference
1	Cost to Reach Destination (Transportation)	124	134	−10
2	Price of Leisure Activities (Culture and Leisure)	121	132	−11
3	Price of Public Transport (Transportation)	166	178	−12
4	Value for Money (Accommodation)	170	186	−16
5	Beauty of Landscapes (Environment)	235	252	−17
6	Safety and Feeling of Security (Local Hospitality and Feeling of Safety)	179	197	−18
7	Overall Quality (Local Food)	180	200	−19
8	Diversity and Range (Historical Heritage)	231	261	−29
9	Value for Money (Local Food)	131	166	−35

G. U.S. Market Competitive Advantages, Competitiveness, and Disadvantages Compared to Canada-Mexico Benchmark

United States vs. CanMex Benchmark:
Compared to the other major international destinations visited by Canadian and Mexican travelers, the United States:

- Had a competitive advantage in more than two-thirds (34) of the 50 subcategories across all 10 visitor experience categories;

- Was competitive in 10 subcategories and had a competitive disadvantage in 6 subcategories.

Competitive Advantage. The 34 subcategories in which the United States had a competitive advantage spanned 9 of the 10 visitor experience categories:

- Transportation (7 subcategories); Shopping (5); Culture and Leisure (5); and Beach and Water (5); Tourist Information Centers (4); Environment (3); Local Food (3); Local Hospitality and Feeling of Safety (1); and Accommodation (1).

The United States did not have a competitive advantage in any subcategory within the Historical Heritage category.

The top 6 subcategories where the United States had the greatest competitive advantage spanned 4 different visitors experience categories:

- +107 points: Parking Convenience (Transportation)

- +96 points: Water Activities (Beach and Water)

- +92 points: Cleanliness and Upkeep (Beach & Water)

- +90 points: Hours/Days of Operation (Shopping)

- +90 points: Range of Shopping Possibilities (Shopping)

- +77 points: Smartphone Application (Tourist Information Centers)

Competitive. The 10 subcategories in which the United States was competitive spanned 7 of the 10 visitor experience categories:

- Historical Heritage (3 subcategories); Accommodation (2); Culture and Leisure (1); Transportation (1); Local Food (1), Local Hospitality and Feeling of Safety (1); and Environment (1)

The United States did not have a competitive score in any subcategory within the following overall visitor experience categories: Shopping, Beach and Water, and Tourist Information Centers.

The 4 subcategories where the United States was competitive and closest to having a competitive advantage:

- +9 points: Value for Money (Accommodation)

- +4 points: Hospitality of Personnel (Accommodation)

- +4 points: Hospitality of Personnel (Historical Heritage)

- +2 points: Price of Leisure Activities (Culture and Leisure)

The 4 subcategories in which the United States was competitive and closest to having a competitive disadvantage:

- -3 points: Entrance Fees (Historical Heritage)
- -5 points: Safety and Feeling of Security (Local Hospitality and Feeling of Safety)
- -8 points: Hospitality of Personnel on Public Transportation (Transportation)
- -9 points: Commitment to the Environment (Environment)

Competitive Disadvantage. The 6 subcategories in which the United States had a competitive disadvantage spanned 4 of the 10 visitor experience categories: Transportation (2 subcategories), Historical Heritage (2), Environment (1), and Local Hospitality Feeling of Safety(1).

The United States did not have a competitive disadvantage in any subcategory within the following visitor experience categories: Shopping, Tourist Information Centers, Culture and Leisure, Beach and Water, Accommodation, and Local Food.

1 of the 6 subcategories in which the United States had a competitive disadvantage related to the local hospitality of Americans. Only one referenced "price," "entrance fee," or "value for money," which is in contrast to the experiences of overseas visitors detailed in Section F.

- -11 points: Hospitality of Locals (Local Hospitality and Feeling of Safety)
- -13 points: Price of Public Transit (Transportation)
- -25 points: Management and Maintenance (Historical Heritage)
- -32 points: Beauty of Landscapes (Environment)
- -33 points: Diversity and Range (Historical Heritage)
- -44 points: Accessibility of Public Transit (Transportation)
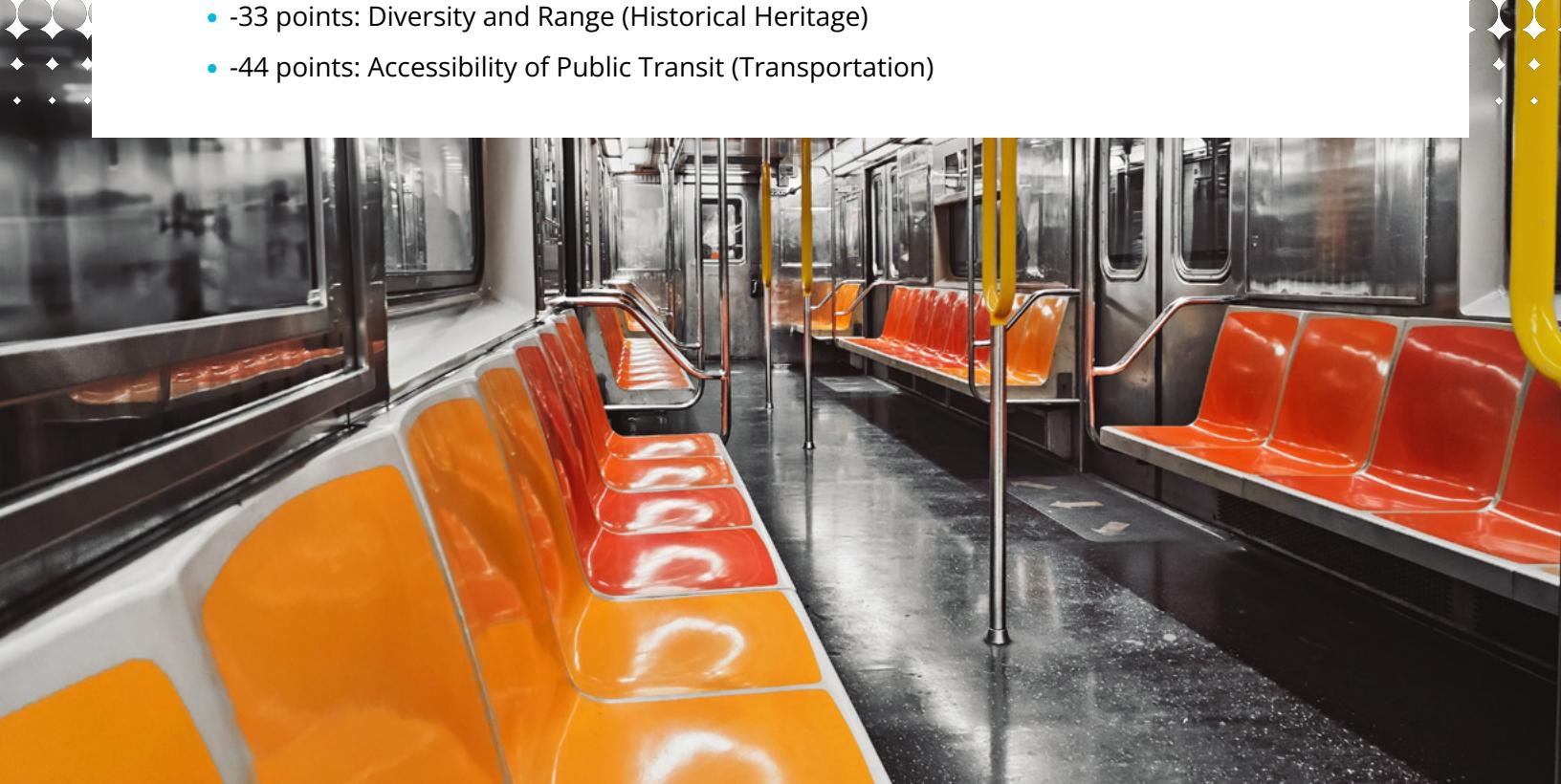
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Where the U.S. has a Competitive Advantage: the United States vs. Canada-Mexico Benchmark

Subcategories where the U.S. rating is at least 10 points greater than the Canada-Mexico Benchmark rating

	Subcategory (Category)	USA	CanMex Benchmark	Difference
1	Parking Convenience (Transportation)	213	106	107
2	Water Activities (Beach and Water)	306	210	96
3	Cleanliness and Upkeep (Beach and Water)	327	235	92
4	Range of Shopping Possibilities (Shopping)	299	210	90
5	Hours/Days of Operation (Shopping)	276	186	90
6	Smartphone Application (Tourist Information Centers)	254	177	77
7	Nightlife (Culture and Leisure)	275	205	70
8	Number of Information Centers (Tourist Information Centers)	227	159	68
9	Ease of Communication with Locals (Local Hospitality and Feeling of Safety)	276	211	65
10	Diversity and Choice (Local Food)	267	204	64
11	Hours/Days of Operation (Tourist Information Centers)	260	197	62
12	Ease of Finding Your Way Around Using Signage (Transportation)	256	195	61
13	Transportation Infrastructure (Transportation)	261	203	59
14	Amusement and Theme Parks (Culture and Leisure)	329	270	59
15	Hospitality at Entry Point (Transportation)	249	191	58
16	Safety for Swimming (Beach and Water)	308	255	53
17	Hospitality of Personnel (Shopping)	258	210	47
18	Value for Money (Shopping)	201	155	46
19	Efficiency of Personnel (Tourist Information Centers)	246	201	46
20	Cleanliness of Outside Cities (Environment)	259	216	43
21	Theater, Opera, and Cultural Shows (Culture and Leisure)	246	204	42
22	Overall Quality (Accommodation)	282	241	41
23	Taxi Service (Transportation)	222	185	37
24	Beauty of Beach (Beach and Water)	344	308	36
25	Cleanliness of Public Areas (Environment)	236	203	33
26	Diversity and Range (Beach and Water)	299	268	31
27	Quality of Handicrafts and Souvenirs (Shopping)	234	206	29
28	Cost of Transportation to Reach Destination (Transportation)	184	156	28
29	Overall Quality (Local Food)	260	233	27
30	Hospitality of Personnel (Food Experience)	275	250	25
31	Architecture and Urban Development (Environment)	256	234	22
32	Access to/from the Airport (Transportation)	265	245	20
33	Diversity and Range (Culture and Leisure)	272	252	20
34	Guided Tours (Culture and Leisure)	255	237	18

Where the U.S. Remains Competitive: United States vs. Canada-Mexico Benchmark

Subcategories where the U.S. market score is within ± 10 points of the Canada-Mexico Benchmark score

	Subcategory (Categories)	USA	CanMex Benchmark	Difference
1	Value for Money (Accommodation)	215	205	9
2	Hospitality of Personnel (Accommodation)	275	270	4
3	Hospitality of Personnel (Historical Heritage)	312	308	4
4	Price of Leisure Activities (Culture and Leisure)	159	157	2
5	Value for Money (Local Food)	199	200	−2
6	Convenience of Visiting Popular Tourist Attractions and Crowdedness (Historical Heritage)	249	251	−2
7	Entrance Fees (Historical Heritage)	239	242	−3
8	Safety and Feeling of Security (Local Hospitality and Feeling of Safety)	237	242	−5
9	Hospitality of Public Transit Personnel (Transportation)	212	221	−8
10	Commitment to the Environment (Environment)	222	231	−9

Where the U.S. has a Competitive Disadvantage: United States vs. Canada-Mexico Benchmark

Subcategories where the U.S. market score is at least 10 points lower than the Canada-Mexico Benchmark

	Subcategory (Categories)	USA	CanMex Benchmark	Difference
1	Hospitality of Locals (Local Hospitality and Feeling of Safety)	254	265	−11
2	Price of Public Transit (Transportation)	226	239	−13
3	Management and Maintenance (Historical Heritage)	290	316	−25
4	Beauty of Landscapes (Environment)	283	315	−32
5	Diversity and Range (Historical Heritage)	311	344	−33
6	Accessibility of Public Transport (Transportation)	231	275	−44

H. Changes in Visitor Satisfaction Ratings in the U.S. Market Compared to OVS and CanMex Benchmark Markets, 2019 vs. 2023

United States vs. Overseas Benchmark Markets (Categories)

United States. U.S. satisfaction scores provided by overseas visitors increased in a statistically significant manner[25] in 6 of 10 overall visitor experience categories from 2019 to 2023 (see Appendix A):

- +30 points: Tourist Information Centers
- +20 points: Beach and Water
- +19 points: Culture and Leisure
- +18 points: Accommodation
- +14 points: Historical Heritage
- +10 points: Transportation

During the same period, U.S. satisfaction scores by overseas visitors experienced statistically significant decreases in only 1 category:

- -15 points: the Environment

Overseas Benchmark. OVS Benchmark market satisfaction scores provided by overseas visitors experienced statistically significant increases in visitors' satisfaction ratings in 4 out of 10 categories during the same period:

- +18 points: Beach and Water
- +16 points: Transportation
- +13 points: Tourist Information Centers
- +10 points: Culture and Leisure

From 2019 to 2023, the overseas benchmark market satisfaction ratings provided by overseas visitors experienced 0 categories in which scores decreased in a statistically significant manner.

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[25] A change of 10 points or more, either in a positive or negative direction, is statistically significant according to MMGY TCI's research methodology.

United States vs. Overseas Benchmark Markets (Subcategories)

United States. From 2019 to 2023, the U.S. satisfaction scores rated by overseas visitors increased in a statistically significant manner in 26 of 49 subcategories (see Appendix A). The 10 largest increases were:

- +34 points: Number of Information Centers (Tourist Information Centers)
- +32 points: Hours/Days of Operation (Tourist Information Centers)
- +30 points: Price of Public Transit (Transportation)
- +30 points: Diversity and Range (Beach & Water)
- +30 points: Diversity and Range (Culture & Leisure)
- +29 points: Smartphone Application (Tourist Information Centers)
- +27 points: Taxi Service (Transportation)
- +26 points: Water Activities (Beach & Water)
- +25 points: Efficiency of Personnel (Tourist Information Centers)
- +25 points: Theater, Opera, Cultural Shows (Culture and Leisure)

During the same period, the satisfaction scores of overseas visitors rating the United States experienced statistically significant decreases in 2 of 49 subcategories:

- -10 points: Architecture and Urban Development (Environment)
- -12 points: Cleanliness Outside Cities (Environment)

Overseas Benchmark. The satisfaction scores of overseas visitors rating OVS Benchmark markets experienced statistically significant increases in 23 of 49 subcategories. See Appendix A. The 10 largest increases occurred in the following subcategories:

- +28 points: Number of Information Centers (Tourist Information Centers)
- +24 points: Safety for Swimming (Beach & Water)
- +23 points: Transportation Infrastructure (Transportation)
- +21 points: Taxi Service (Transportation)
- +21 points: Access to/from the airport (Transportation)
- +21 points: Price of Public Transport (Transportation)

- +21 points: Cleanliness and Upkeep (Beach and Water)
- +18 points: Water Activities (Beach and Water)
- +18 points: Signage and Ease of Finding your way Around (Transportation)
- +17 points: Cleanliness of Public Areas (Environment)

Satisfaction scores of overseas visitors rating OVS Benchmark markets experienced statistically significant decreases in 0 of 49 visitor experience subcategories during the same period.

United States vs. Canada-Mexico Benchmark Markets (Categories)

United States. From 2019 to 2023, U.S. satisfaction scores given by Canadian and Mexican visitors experienced statistically significant[26] increases in 7 out of 10 overall visitor experience categories (see Appendix B for more details).

- +28 points: Food Experience
- +24 points: Local Hospitality and Feeling of Safety
- +21 points: Historical Heritage
- +15 points: Transportation and Tourist Information Centers
- +12 points: Shopping
- +11 points: Accommodation

During the same period, U.S. satisfaction scores provided by Canadian and Mexican visitors experienced statistically significant decreases in 0 categories.

Canada-Mexico Benchmarks. From 2019 to 2023, CanMex Benchmark markets' satisfaction scores provided by Canadian and Mexican visitors experienced statistically significant increases in all 10 visitor experience categories:

- +27 points: Accommodation
- +25 points: Historical Heritage
- +23 points: Shopping
- +22 points: Transportation
- +21 points: Local Hospitality and Feeling of Safety
- +19 points: Tourist Information Centers

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[26] A change of 10 points or more, either in a positive or negative direction, is statistically significant according to MMGY TCI's research methodology.

- +16 points: Local Food
- +16 points: Beach and Water
- +14 points: Culture and Leisure
- +11 points: Environment

Satisfaction scores of overseas visitors rating OVS Benchmark markets experienced statistically significant decreases in 0 categories during the same period.

United States vs. Canada-Mexico Benchmark Markets (Subcategories)

United States. From 2019 to 2023, the U.S. satisfaction ratings provided by Canadian and Mexican visitors demonstrated statistically significant increases in 27 out of 49 subcategories (see Appendix B). The 10 largest increases occurred in the following subcategories:

- +48 points: Hospitality at Entry Point (Transportation)
- +43 points: Hospitality of Local Inhabitants (Local Hospitality and Feeling of Safety)
- +42 points: Hospitality of Personnel (Local Food)
- +38 points: Hospitality of Personnel on Public Transit (Transportation)
- +36 points: Diversity and Range (Historical Heritage)
- +32 points: Taxi Service (Transportation)
- +30 points: Hospitality of Personnel (Historical Heritage)
- +30 points: Value for Money (Food Experience)
- +30 points: Ease of Communication with Locals (Local Hospitality Feeling of Safety)
- +30 points: Hospitality of Personnel (Shopping)

U.S. market satisfaction ratings provided by visitors from Canada and Mexico experienced statistically significant decreases in 5 of the 49 subcategories during the same period:

- -10 points: Beauty of Beach (Beach and Water)
- -10 points: Access to/from the Airport (Transportation)
- -11 points: Accessibility of Public Transit (Transportation)
- -12 points: Water Activities (Beach and Water)
- -30 points: Amusement and Theme Parks (Culture and Leisure)

Canada-Mexico Benchmark. From 2019 to 2023, the CanMex Benchmark markets' satisfaction ratings by visitors from Canada and Mexico experienced statistically significant increases in 43 out of 49 subcategories' scores. For more info, see Appendix B. The 10 largest increases occurred in the following subcategories:

- +34 points: Cleanliness and Upkeep (Beach and Water)
- +32 points: Price of Public Transport (Transportation)
- +31 points: Hospitality of Personnel (Historical Heritage)
- +30 points: Parking Convenience (Transportation)
- +30 points: Signage and Ease of Finding your way Around (Transportation)
- +29 points: Price of Leisure Activities (Culture and Leisure)
- +28 points: Overall Quality (Accommodation Experience)
- +28 points: Hospitality of Personnel (Accommodation)
- +28 points: Convenience of Visiting Popular Tourist Attractions and Crowdedness (Historical Heritage)
- +28 points: Smartphone Application (Tourist Information Centers)

From 2019 to 2023, satisfaction scores provided visitors from Canada and Mexico regarding CanMex Benchmark markets experienced statistically significant decreases in satisfaction in 0 subcategories.

I. Drivers of Visitor Satisfaction: The Relationship Between Tourism Products and Contextual Factors, 2019 vs. 2023

Visitor satisfaction at the destination level is influenced by the tourism product quality perception as well as by intangible "contextual factors," or experiences that visitors do not need to pay for, such as resident attitudes towards tourism, the feeling of safety, cleanliness, sense of place, and ease of orientation.

TRAVELSAT© identifies 22 top drivers influencing visitor satisfaction globally in 2023, with the top 5 factors being (1) Locals' Hospitality, (2) the Accommodation experience, (3) Feelings of Safety, (4) Museums and Historic Sites, and (4) Crowding, and Convenience for Visiting.

United States vs. Overseas Benchmark Markets' Relative Performance: Drivers of Visitor Satisfaction (2019)

Of all the 21 performance drivers measured in 2019, the United States had a competitive advantage vis-à-vis the OVS Benchmark in 11 drivers, was competitive in 7, and had a competitive disadvantage in 3 (see Table 5).

Of the top 10 performance drivers measured in 2019, the United States' performance compared to the OVS Benchmark as follows:

- **Competitive advantage** in 2 drivers: Cultural diversity and Architecture and urbanization

- **Competitive** in 5 drivers: Locals' hospitality, Feeling of Safety, Museums and historic sites, Crowding, convenience for visiting, and Excursions & tours

- **Competitive disadvantage** in 3 drivers: Accommodation experience, Landscape beauty, and Local Food experience

Top Drivers Influencing Global Visitor Satisfaction

Driver	Value
Locals' Hospitality	0.531
Accommodation	0.525
Feeling of Safety	0.500
Museums and Historical Sites	0.491
Crowd Management and Convenience Visiting	0.489
Beauty of Landscapes	0.488
Cultural Diversity	0.484
Excursions and Tours	0.484
Local Food	0.479
Architecture and Urbanization	0.471
Shopping	0.466
Ease of Orientation	0.460
Digital Hospitality	0.458
Commitment to the Environment	0.453
Public Transit	0.447
Amusement Parks	0.444
Cleanliness	0.441
Road Infrastructure	0.434
Nightlife	0.424
Taxi Service	0.417
Theaters and Shows	0.407
Parking Convenience	0.394

Table 5: Performance of the United States vs. Overseas Benchmark (2019 to 2023)

	Top Drivers Influencing Visitor Satisfaction	Correlation Score*	2019	2023	Change 2019-2023
1	Locals' Hospitality	0.531	Competitive	Competitive	=
2	Accommodation	0.525	Competitive Disadvantage	Competitive	+
3	Feeling of Safety	0.500	Competitive	Competitive Disadvantage	-
4	Museums and Historical Sites	0.491	Competitive	Competitive	=
5	Crowd Management and Convenience Visiting	0.489	Competitive	Competitive Advantage	+
6	Beauty of Landscapes	0.488	Competitive Disadvantage	Competitive Disadvantage	=
7	Cultural Diversity	0.484	Competitive Advantage	Competitive Advantage	=
8	Excursions and Tours	0.484	Competitive	Competitive Advantage	+
9	Local Food	0.479	Competitive Disadvantage	Competitive Disadvantage	=
10	Architecture and Urbanization	0.471	Competitive Advantage	Competitive Advantage	=
11	Shopping	0.466	Competitive Advantage	Competitive Advantage	=
12	Ease of Orientation	0.460	Competitive Advantage	Competitive Advantage	=
13	Digital Hospitality	0.458	Competitive Advantage	Competitive Advantage	=
14	Commitment to the Environment	0.453	NA	Competitive	NA
15	Public Transit	0.447	Competitive	Competitive	=
16	Amusement Parks	0.444	Competitive Advantage	Competitive Advantage	=
17	Cleanliness	0.441	Competitive Advantage	Competitive Advantage	=
18	Road Infrastructure	0.434	Competitive Advantage	Competitive Advantage	=
19	Nightlife	0.424	Competitive Advantage	Competitive Advantage	=
20	Taxi Service	0.417	Competitive	Competitive	=
21	Theaters and Shows	0.407	Competitive Advantage	Competitive Advantage	=
22	Parking Convenience	0.394	Competitive Advantage	Competitive Advantage	=

*The Correlation Score indicates the degree to which each satisfaction criterion explains variations in overall satisfaction. A higher score signifies a stronger explanatory relationship with overall visitor satisfaction. Accordingly, the Correlation Score serves as a measure of the relative importance of each criterion in shaping the visitor experience.

United States vs. OVS Benchmark Relative Performance: Drivers of Visitor Satisfaction (2023)

Of all the 22 performance drivers, measured in 2023, the United States had a competitive advantage compared to the OVS Benchmark in 13 drivers, was competitive in 6 drivers and had competitive disadvantage in 3 drivers (see Table 5).

Of the top 10 performance drivers measured in 2023, the United States performance compared to the OVS Benchmark was:

- **Competitive advantage** in 4 drivers: Crowding, convenience for visiting, Cultural diversity, Excursions & tours, and Architecture & urbanization

- **Competitive** in 3 drivers: Locals' hospitality, Accommodation experience, and Museums & historic sites

- **Competitive disadvantage** in 3 drivers: Safety feeling, Landscape beauty, and Food experience

United States vs. OVS Benchmark Relative Performance: Drivers of Visitor Satisfaction (2019 vs. 2023)

Of the 21 performance drivers measured in both 2019 and 2023, the performance of the United States compared to the OVS Benchmark showed (see Table 5):

- **No change** in 17 drivers (Competitive Advantage, Competitive or Competitive Disadvantage in both years)

- **Improved** in 3 drivers
  - Accommodation experience (Competitive Disadvantage in 2019 to Competitive in 2023
  - Crowding, convenience for visiting (Competitive in 2019 to Competitive Advantage in 2023)
  - Excursions and tours (Competitive in 2019 to Competitive Advantage in 2023)

- Worsened in 1 driver
  - Feeling of safety (Competitive in 2019 to Competitive Disadvantage in 2023)

Table 6: Performance of the United States vs. Canada-Mexico Benchmark (2019 to 2023)

	Top Drivers Influencing Visitor Satisfaction	Correlation Score	2019	2023	Change 2019-2023
1	Locals' Hospitality	0.531	Competitive Disadvantage	Competitive Disadvantage	=
2	Accommodation	0.525	Competitive Advantage	Competitive Advantage	=
3	Feeling of Safety	0.500	Competitive Advantage	Competitive	-
4	Museums and Historical Sites	0.491	Competitive	Competitive	=
5	Crowd Management and Convenience Visiting	0.489	Competitive	Competitive	=
6	Beauty of Landscapes	0.488	Competitive Disadvantage	Competitive Disadvantage	=
7	Cultural Diversity	0.484	Competitive Advantage	Competitive Advantage	=
8	Excursions and Tours	0.484	Competitive Advantage	Competitive Advantage	=
9	Local Food	0.479	Competitive Advantage	Competitive Advantage	=
10	Architecture and Urbanization	0.471	Competitive Advantage	Competitive Advantage	=
11	Shopping	0.466	Competitive Advantage	Competitive Advantage	=
12	Ease of Orientation	0.460	Competitive Advantage	Competitive Advantage	=
13	Digital Hospitality	0.458	Competitive Advantage	Competitive Advantage	=
14	Commitment to the Environment	0.453		Competitive	NA
15	Public Transit	0.447	Competitive Disadvantage	Competitive Advantage	+
16	Amusement Parks	0.444	Competitive Advantage	Competitive Advantage	=
17	Cleanliness	0.441	Competitive Advantage	Competitive Advantage	=
18	Road Infrastructure	0.434	Competitive Advantage	Competitive Advantage	=
19	Nightlife	0.424	Competitive Advantage	Competitive Advantage	=
20	Taxi Service	0.417	Competitive Advantage	Competitive Advantage	=
21	Theater and Shows	0.407	Competitive Advantage	Competitive Advantage	=
22	Parking Convenience	0.394	Competitive Advantage	Competitive Advantage	=

## United States vs. CanMex Benchmark Relative Performance: Drivers of Visitor Satisfaction (2019)

Of all the 21 performance drivers measured in 2019, the United States had a competitive advantage compared to the CanMex Benchmark in 16 drivers, was competitive in 2 drivers and had competitive disadvantage in 3 drivers (see Table 6).

Of the top 10 performance drivers measured in 2019, the United States performance compared to the CanMex benchmark was:

- **Competitive advantage** in 6 drivers: Accommodation experience, Safety feeling, Cultural diversity, Excursions & tours, Food experience, and Architecture & urbanization

- **Competitive** in 2 drivers: Museums & historic sites and Crowding, convenience for visiting

- **Competitive disadvantage** in 2 drivers: Locals' hospitality, and Landscape beauty

United States vs. CanMex Benchmark Relative Performance: Drivers of Visitor Satisfaction (2023)

Of all the 22 performance drivers, measured in 2023, the United States had a competitive advantage compared to the CanMex Benchmark in 16 drivers, was competitive in 4 drivers and had competitive disadvantage in 2 drivers (see Table 6).

Of the top 10 performance drivers measured in 2023, the United States performance compared to the CanMex benchmark was:

- **Competitive advantage** in 5 drivers: Accommodation experience, Cultural diversity, Excursions & tours, Food experience, and Architecture & urbanization

- **Competitive** in 3 drivers: Safety feeling, Museums & historic sites, and Crowding, convenience for visiting

- **Competitive disadvantage** in 2 drivers: Locals' hospitality and Landscape beauty

United States vs. CanMex Benchmark Relative Performance: Drivers of Visitor Satisfaction (2019 vs. 2023)

Of the 21 performance drivers measured in both 2019 and 2023, the performance of the United States compared to the CanMex Benchmark showed (see Table 6):

- **No change** in 19 drivers (Competitive Advantage, Competitive or Competitive Disadvantage in both years)

- **Improved** in 1 driver
  - Public transport (Competitive Disadvantage in 2019 to Competitive Advantage in 2023)

- **Worsened** in 1 driver
  - Safety feeling (Competitive Advantage in 2019 to Competitive in 2023)

Section 2.
International Competitiveness of the United States as a Destination through Internet-Based Ratings and Reviews

A. Methodological Overview

Consolidating Ratings and Reviews

- TRAVELSAT© Pulse uses an aggregation methodology to consolidate reviews, both numerical scores and written feedback, from sources that cater to different aspects of the tourism ecosystem.

- All scores are presented through a consolidated scale of 0-10. The scores have been converted from their original source and weighted to adjust the significance for each source. Analyses are carried out across verticals, their sub-categories, and key international markets.

Sentiment Analysis Technology

- Beyond structured ratings, written feedback is also analyzed using the most developed sentiment lexicon. This allows for an analysis of positive and negative deflections by keywords.

- The AI semantic engine covers 16 languages: Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish, Simplified Chinese and Turkish. However, ratings and reviews are collected for all sourcing markets sharing their experience on the rating platforms.

Sources Connected to TRAVELSAT© Pulse

- The sources range from search engines with a review function, such as Google, to complete online travel agencies, like Trip Advisor and Booking.com. Currently, 45 sources are connected, and 95 percent of all experience-based data available online is analyzed.

- All rating platforms collect global data on the same KPIs, ensuring accuracy when comparing indicators to each other.

Vertical	Review Volume (01/01/2023 to 12/31/2023)
Accommodations	701,943
Attractions	66,733
Restaurants	46,172
Total Sample	**814,848**

Sample Definition and Analysis Period

- Using Trip Advisor to identify properties across all regions of the United States, a sample was used to create a representative picture of the full tourism ecosystem. A one-year period was selected for analysis, ranging from January 1st to December 31st, 2023.

B. Global Ratings

International visitors' ratings of the United States across three main verticals—Attractions, Restaurants, and Accommodations

The average score of all consolidated experiences from international visitors in the United States in 2023 stood at 7.9 out of 10. Analyzing each score by vertical, experiences within Attractions held the highest score, at an 8.9. Restaurants follow suit, with a score of 8.2. Accommodations scored the lowest of all three, a common result in destinations where the sector carries some of the highest burden (most interaction with travelers) of visitor satisfaction. While ratings for Attractions surpassed the benchmark, Restaurants and Accommodations scored lower than the norm.

International Visitors' Overall Experiences in Three Main Verticals
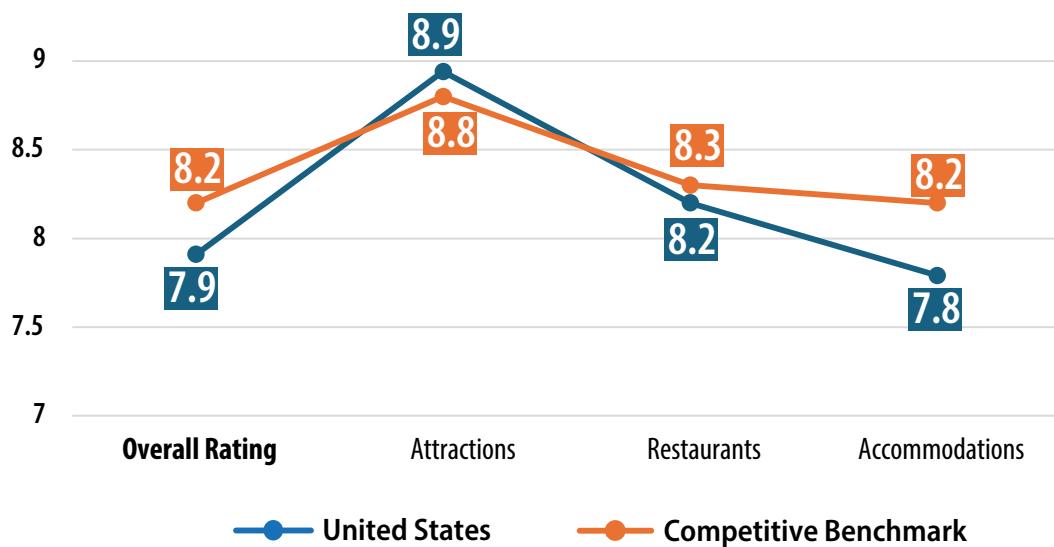
Rating per Market

Scores for the United States' Main International Source Markets

Scores per market show that visitors from Mexico were, on average, most satisfied with their visitor experience when compared with other key international markets in 2023. Visitors from the Dominican Republic left the second highest ratings, while those from Brazil stood in third place for visitor satisfaction. Asian and European markets provided lower scores on average in 2023, especially Indian and Japanese tourist reviews. All countries in this study had favorable rating of the United States (above the threshold of a 7.5 score).

U.S. Overall Rating by Source Market

Legend: ■ 2023 Rating per Market   – – Overall Rating
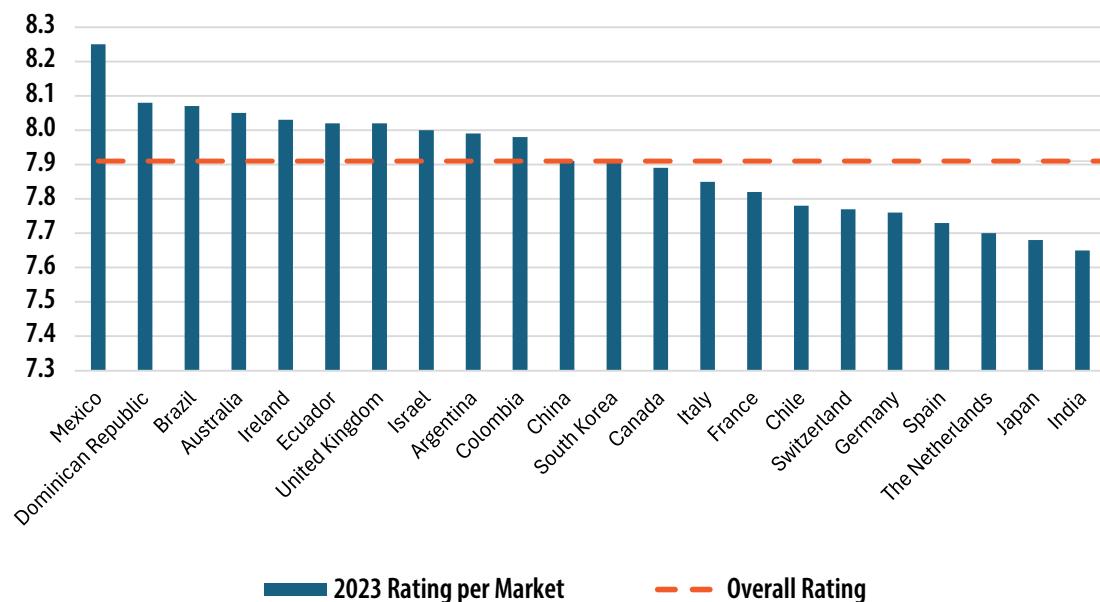
Sentiment Analysis [27]

Guests' Written Reviews on Topics Characterizing the Visitor Experience:

Activities: Data collected on guests' written reviews showed that the Activities topic was the most positively mentioned, especially in regards to the variety of attractions available. Additionally, the United States received a very high number of positive mentions for the level of entertainment offered.

**1. Activities
WAVG 9.43**

TOPIC	MENTIONS	SENTIMENT SCORE
Attractions	58954	9.48
Entertainment	7965	9.41
Entertainers	5803	8.90

Location: The Location of the destination visited by international guests in the United States, including the surrounding area and the transportation options for arrival, followed Activities in terms of the number and degree of positive reviews received. However, sentiment around the subtopic of the Surrounding Area was more positive than that of the Transport options.
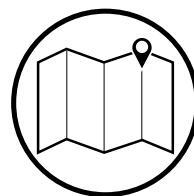
**2. Location
WAVG 8.90**

TOPIC	MENTIONS	SENTIMENT SCORE
Surrounding Area	234337	9.14
Transport	109875	8.40

Food and Beverage: Food and Beverage stood in third place, with several very highly rated topics. Guests reviews of the quality of the food itself were the most positive, followed by the restaurant options. Breakfast, on the other hand, received less positive reviews than other subtopics.

**3. Food and
Beverage
WAVG 8.77**

TOPIC	MENTIONS	SENTIMENT SCORE
Food	166530	9.14
Restaurants	213330	9.11
Drinks	69793	8.84
Bar	42467	8.64
Breakfast	153237	7.90

[27] Methodological note: Topics from written reviews are scored from 0 to 10 in terms of the level of positivity with which they are mentioned (0 being the most negative, and 10 being the most positive).

Cleanliness: Cleanliness followed in terms of positive mentions, with general housekeeping, and overall hygiene having received the most positive mentions in 2023. However, comments on odor and humidity, while much less common than on the other two sub-topics, were much more negative.

**4. Cleanliness
WAVG 8.44**

TOPIC	MENTIONS	SENTIMENT SCORE
Housekeeping	112998	8.74
Hygiene	135457	8.07
Odor	19741	3.00
Humidity	4604	0.45

Key Indicators: Mentions of Key Indicators, being Value for money and Sustainable travel, obtained a large degree of positivity within guests written reviews. While the comments on value for money were slightly more positive than those on the perceived sustainable actions, both had similar positive results.
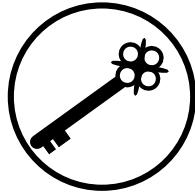
**5. Key Indicator
WAVG 7.82**

TOPIC	MENTIONS	SENTIMENT SCORE
Value for Money	180215	7.95
Sustainable Travel	32829	7.09

Facilities: Comments on Facilities in written reviews were very close in positivity to the Key Indicators. Guests were most happy with the sports facilities at Accommodations, followed by the spa. While there was slightly more criticism toward the rooms and air conditioning, scores were positive overall.

**6. Facilities
WAVG 7.79**

TOPIC	MENTIONS	SENTIMENT SCORE
Sport Facilities	50688	8.99
Spa	2914	8.90
Rooms	422033	7.80
Air Conditioning	14237	7.49
Bathroom	122547	7.37
Toilets	1919	7.15
Internet	14119	6.99

Industry
& Analysis

Service: The topic of Service received more positive mentions than negative ones. While comments on the support and attitude of staff were very positive, comments on experiences in Accommodations receptions were a bit more mixed. Check-in and out saw more criticism.

**7. Service
WAVG 6.87**

TOPIC	MENTIONS	SENTIMENT SCORE
Support	410	9.38
Staff	2635	9.23
Reception	30736	7.67
Ticket Office	6894	6.64
Orders	7638	6.62
Check-In	17809	5.53
Check-Out	4957	5.01

Ambiance: Finally, the topic of Ambiance received much more mixed feedback in 2023 than other topics. The sub-topics of atmosphere and décor had the most positive comments. Lighting factors were also seen positively, yet issues around noisiness brought the larger topic's score down.

**8. Ambiance
WAVG 5.50**

TOPIC	MENTIONS	SENTIMENT SCORE
Atmosphere	11587	9.37
Décor	11238	8.70
Lighting	16582	7.91
Sound	62123	3.56

C. Ratings Per Subcategory

Visitors' Ratings of the United States by Tourist Attraction Subcategories

Attractions in the United States continued to delight international visitors throughout 2023.

Attractions received the highest rating out of all three verticals. However, the scores that the subcategories received were varied.

Around half of the subcategories held scores that were higher or on the vertical's average. The Experience of Fine Dining subcategory kept its spot in first place from 2019, holding an almost perfect score.

Ratings of Attractions by Subcategory

Subcategory	Rating
Experience Fine Dining	9.54
Environmental & Eco. Excursions	9.52
Guided Tour(s)	9.34
Water Sports	9.23
Camping & Hiking	9.19
Historical Locations	9.08
Health & Fitness Activies	9.08
Snow Sports	9.02
Sightseeing	8.98
Outdoor Adventure and Recreational Activities	8.97
Small Towns & Countryside	8.94
Cultural & Ethnic Heritage Sights	8.88
National Parks & Monuments	8.82
Art Galleries & Museums	8.80
Concerts, Plays, & Musicals	8.66
Shopping	8.64
Clubbing & Dancing	8.48
Sporting Event	8.44
Transporation	8.41
Event Centers	8.36
Amusement & Theme Parks	8.04
Golfing	7.74
Casino & Gambling	6.49

Attractions average 8.94

The majority of subcategories above the vertical's average hold a score above 9. Several outdoor and sports-related categories received high ratings within the Attractions vertical, such as Environmental and Eco-Excursions, Water Sports, Camping and Hiking, Health and Fitness activities, and Snow Sports.

Most of the subcategories that received a rating below the Attraction vertical's 8.94 average still scored very positively overall (i.e., above an 8 out of 10 points possible), with the Casinos, and Gambling and Golfing subcategories as the only two exceptions.

Overall, these scores demonstrate the United States' capacity to satisfy visitors through its offer of Attractions.

Visitors' Ratings of the United States by Restaurant Subcategories

International visitors were exceptionally happy with street food experiences in 2023.

The Restaurants subcategory was the second highest rated experience vertical in 2023.

Street food experiences were the most positively rated by far, holding a score of almost 9.

Bakeries and Gastropub restaurants followed in second and third place, respectively, still above the vertical's average.

Wine bars stood right on the vertical's average score. Subcategories below the average included Bars and Clubs, Quick bites and Fast Food, Pubs, and Desserts falling in last place.

While the Restaurant vertical ranked second place overall in 2023, all subcategories in this vertical received high scores that demonstrated visitors' overall satisfaction with U.S. Restaurant experiences.

Ratings by Restaurant Subcategory

Subcategory	Rating
Street Food	8.93
Bakeries	8.47
Gastropub Restaurants	8.31
Wine Bars	8.20
Bars & Clubs	8.13
Quick Bites & Fast Food	8.12
Pubs	8.04
Dessert	8.02

Restaurants average 8.20

Industry
& Analysis
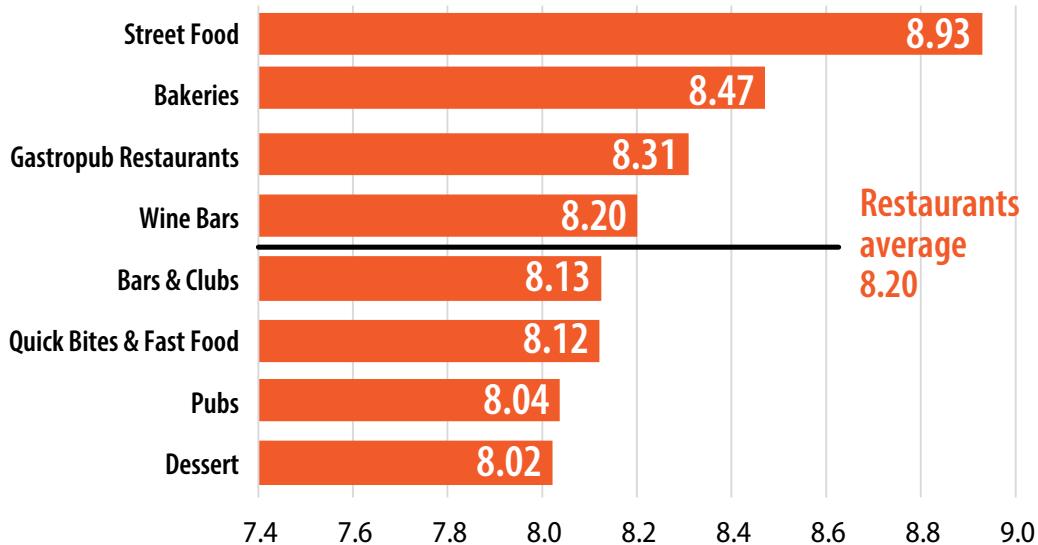
Visitors' Ratings of the United States by Accommodation Subcategories

Apartment hotels and cottages took the leading spot within Accommodations in 2023.

The Accommodations vertical received the lowest scores of all three. However, most of its subcategories stand above the vertical's average.

The number of reviews was most concentrated within the Hotels subcategory, bringing the weighted average score of the vertical closer to the subcategory's score. As such, its lower experience reputation accounted largely for the lower score seen for the vertical as a whole.

This is seen as well by the fact that several subcategories which had lower review counts had higher ratings than the Accommodations average in 2023. The majority of subcategories hold a satisfactory absolute score above 8.

Apartment hotels, cottages, and ranches were the most positively reviewed experiences.

Motels, hotels, and hostels, on the other hand, had significantly lower scores in 2023.

Ratings by Accommodation Subcategory

Subcategory	Rating
Apartment Hotels	8.99
Cottages	8.51
Ranches	8.46
Guest house	8.20
Villas	8.12
Camping	8.12
B&B & Inns	8.06
Boutique Hotels	7.97
Hostels	7.86
Hotels	7.77
Motels	7.31

Restaurants average 8.20
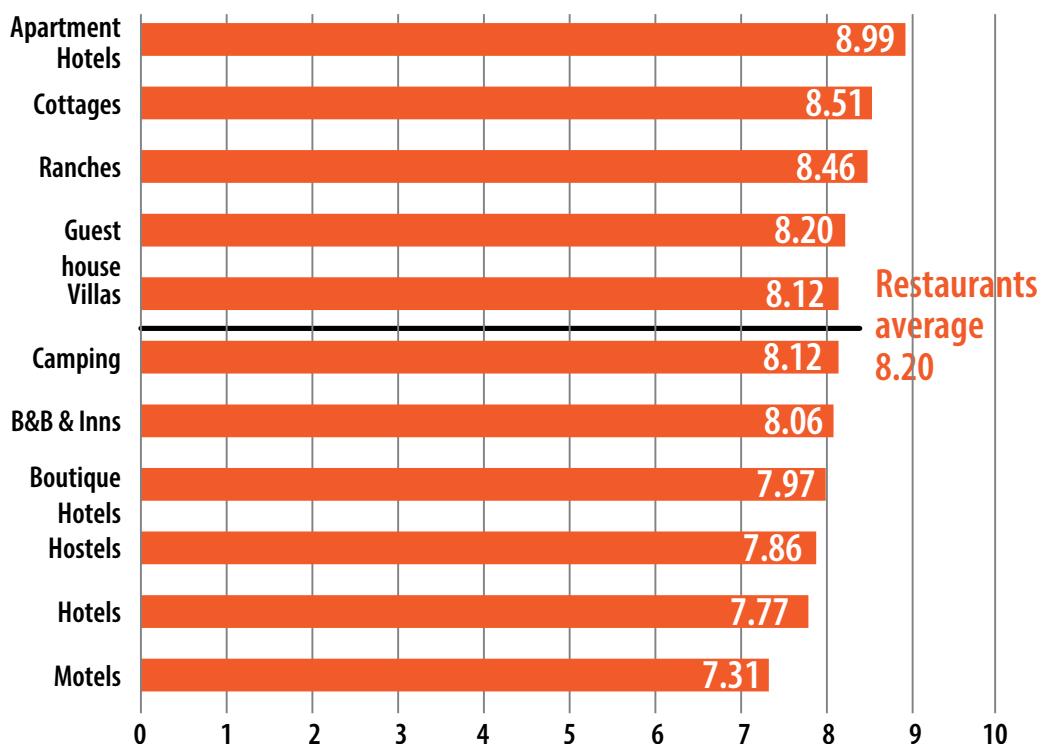
D. Census Division Ratings by Source Market

All Census Divisions received a favorable rating overall by international visitors the United States (above the threshold of a 7.5 score).

Census Division Ratings by Source Market

New England

Visitors from Ecuador gave out the highest score in 2023, alongside other Latin American markets.

The majority of monitored international markets gave New England scores higher than the average score in 2023. The markets that show the highest levels of visitor satisfaction are Latin American markets, including Ecuador, Mexico, Brazil, and Argentina. On the other hand, the three lowest average ratings were given by European markets, including the Netherlands, Germany, and Switzerland.

**Rating of New England
by Individual Source Markets**

Overall
Rating: 8.05

Market	Rating
Ecuador	8.62
Mexico	8.43
Brazil	8.4
Argentina	8.35
Israel	8.31
Dominican Republic	8.31
Colombia	8.28
Australia	8.27
Ireland	8.25
China	8.19
United Kingdom	8.18
Chile	8.09
South Korea	8.09
India	8.09
Canada	7.99
Spain	7.97
Italy	7.94
France	7.86
Japan	7.82
Switzerland	7.77
Germany	7.76
The Netherlands	7.72
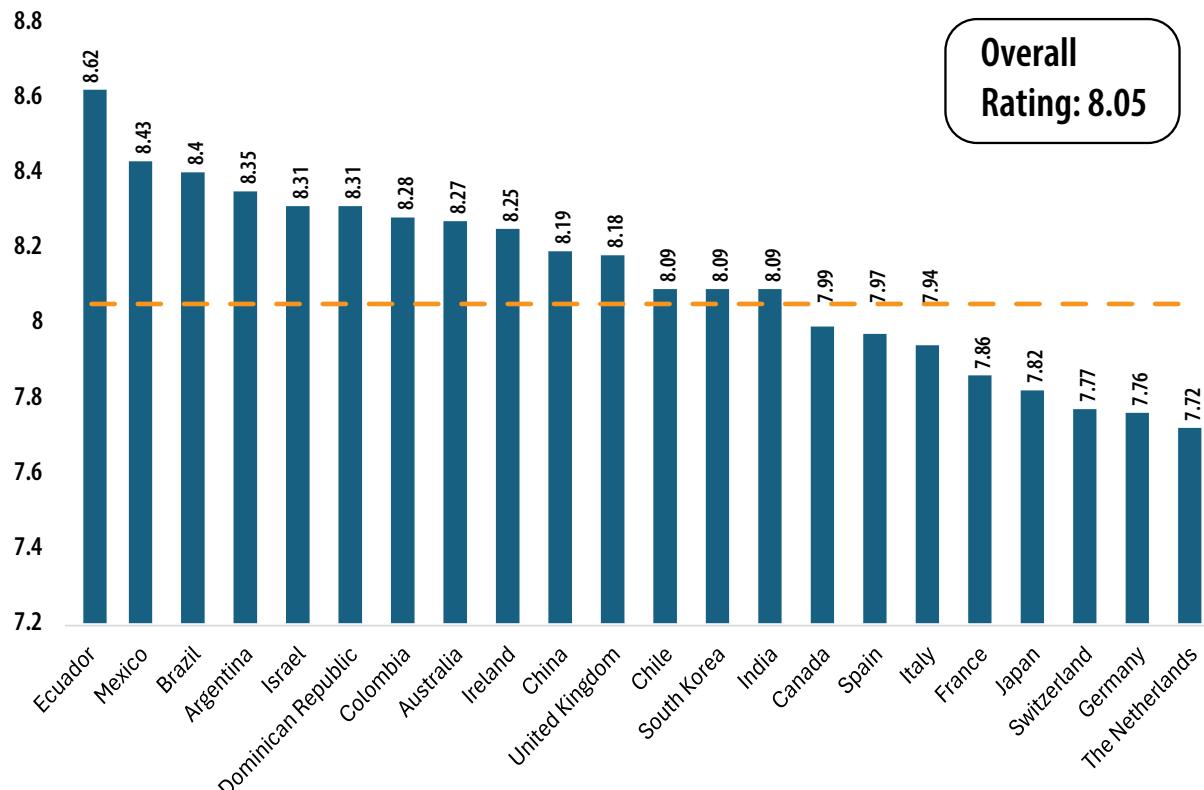
Census Division Ratings by Source Market

Pacific

Several Latin American markets rated their experiences highest in the Pacific census division.

The majority of monitored markets presented ratings that were higher than the census division's average. Latin American markets occupied the three highest places in terms of the average ratings. Those from Mexico presented the highest ratings, followed by visitors from Brazil and Argentina. On the other hand, European markets were those that presented the lowest rating, including visitors from the Netherlands, Spain, France, Germany, Italy, and Switzerland.

**Rating of Pacific
by Individual Source Markets**

Overall
Rating: 8.01

Market	Rating
Mexico	8.42
Brazil	8.22
Argentina	8.18
United Kingdom	8.17
Ecuador	8.16
Australia	8.16
Dominican Republic	8.15
Canada	8.12
Ireland	8.12
Israel	8.09
Colombia	8.08
Chile	8.07
South Korea	8.06
China	8.01
India	7.88
Japan	7.83
Switzerland	7.82
Italy	7.82
Germany	7.80
France	7.77
Spain	7.77
The Netherlands	7.74
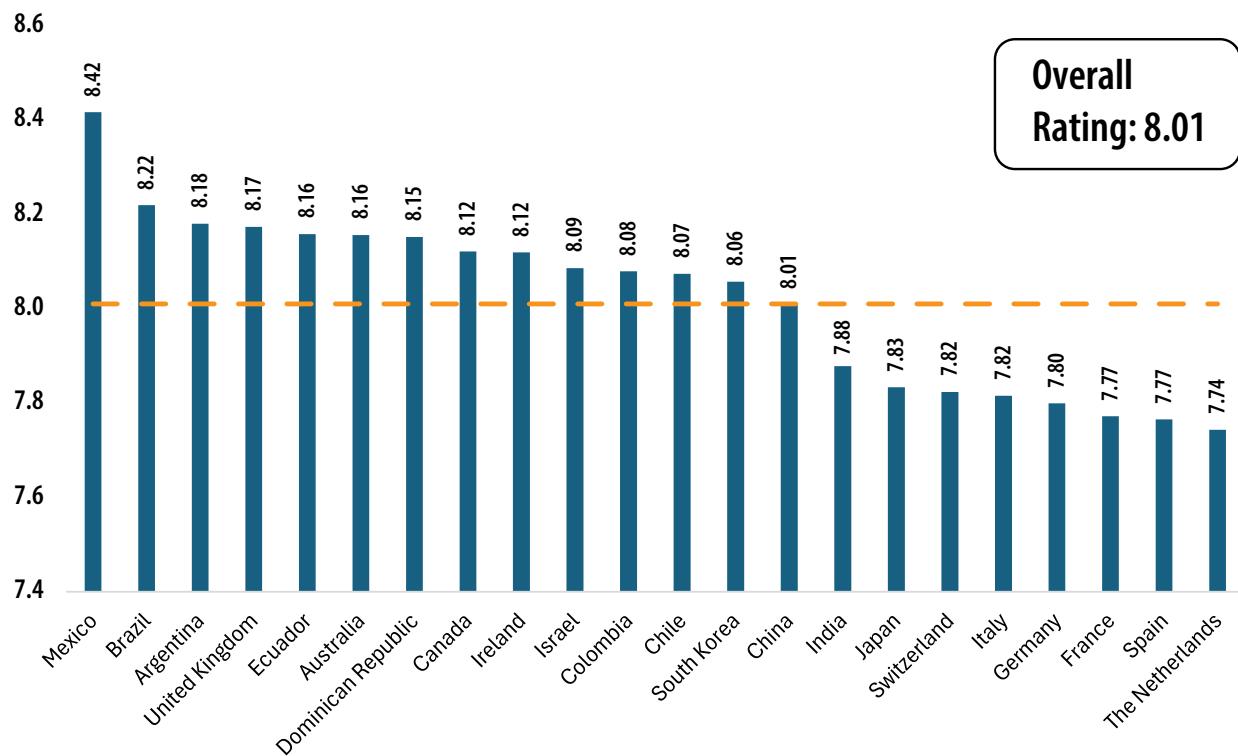
Census Division Ratings by Source Market

Middle Atlantic

Almost all Latin American markets provided the highest ratings for the Middle Atlantic census division.

As in the two previous census divisions, most monitored markets presented scores that were higher than the Middle Atlantic's average. All but one Latin American market, Chile, gave the highest ranks for the Middle Atlantic in 2023. The three highest average ratings come from Mexican, Ecuadorian, and Brazilian visitors. At the other end of the scale, visitors from Asian markets rated their experiences lowest, namely from India, Japan, and China.

**Rating of Middle Atlantic Region
by Individual Source Markets**

Overall
Rating: 7.96

Source Market	Rating
Mexico	8.33
Ecuador	8.29
Brazil	8.16
Dominican Republic	8.12
Colombia	8.10
Argentina	8.06
Italy	8.02
France	8.02
Ireland	8.01
Australia	8.00
United Kingdom	8.00
Germany	7.99
Israel	7.97
Spain	7.88
Canada	7.83
South Korea	7.83
Chile	7.82
The Netherlands	7.79
Switzerland	7.78
China	7.67
Japan	7.44
India	7.30
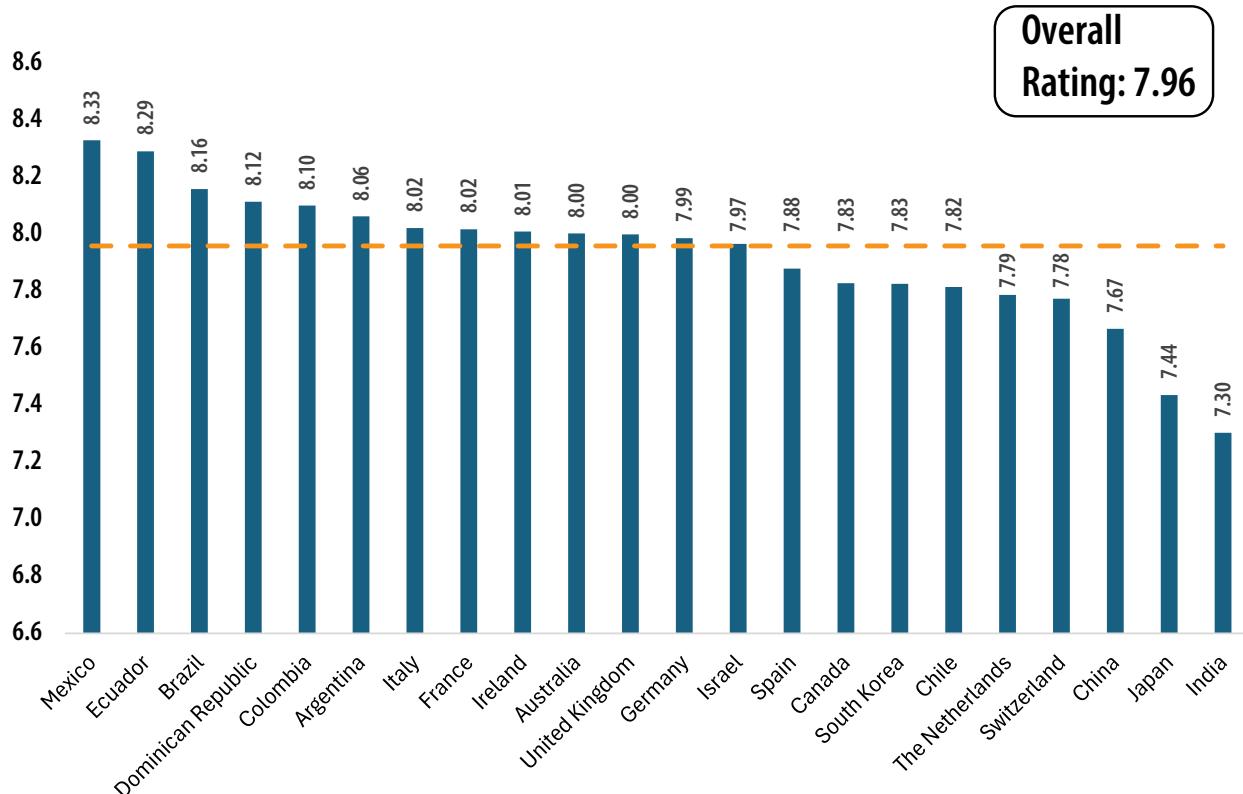
Census Division Ratings by Source Market

East North Central

Mexican, Colombian, and Brazilian visitors provided the highest ratings in East North Central in 2023.

An equal number of the monitored markets scored their experiences either higher or lower than East North Central's overall rating. The three markets to have rated their experiences highest were all Latin American, including Mexico, Colombia, and Brazil. A mix of Asian and European markets presented the lowest ratings, including the Netherlands, Japan, and Germany.

Rating of East North Central Division Region by Individual Source Markets

Overall Rating: 7.96

Source Market	Rating
Mexico	8.46
Colombia	8.25
Brazil	8.23
Israel	8.21
Australia	8.20
Argentina	8.14
United Kingdom	8.13
South Korea	8.09
Chile	8.08
Ireland	8.07
Ecuador	8.05
India	7.95
France	7.93
Spain	7.91
Dominican Republic	7.91
Italy	7.86
Canada	7.80
China	7.80
Switzerland	7.76
Germany	7.68
Japan	7.64
The Netherlands	7.63
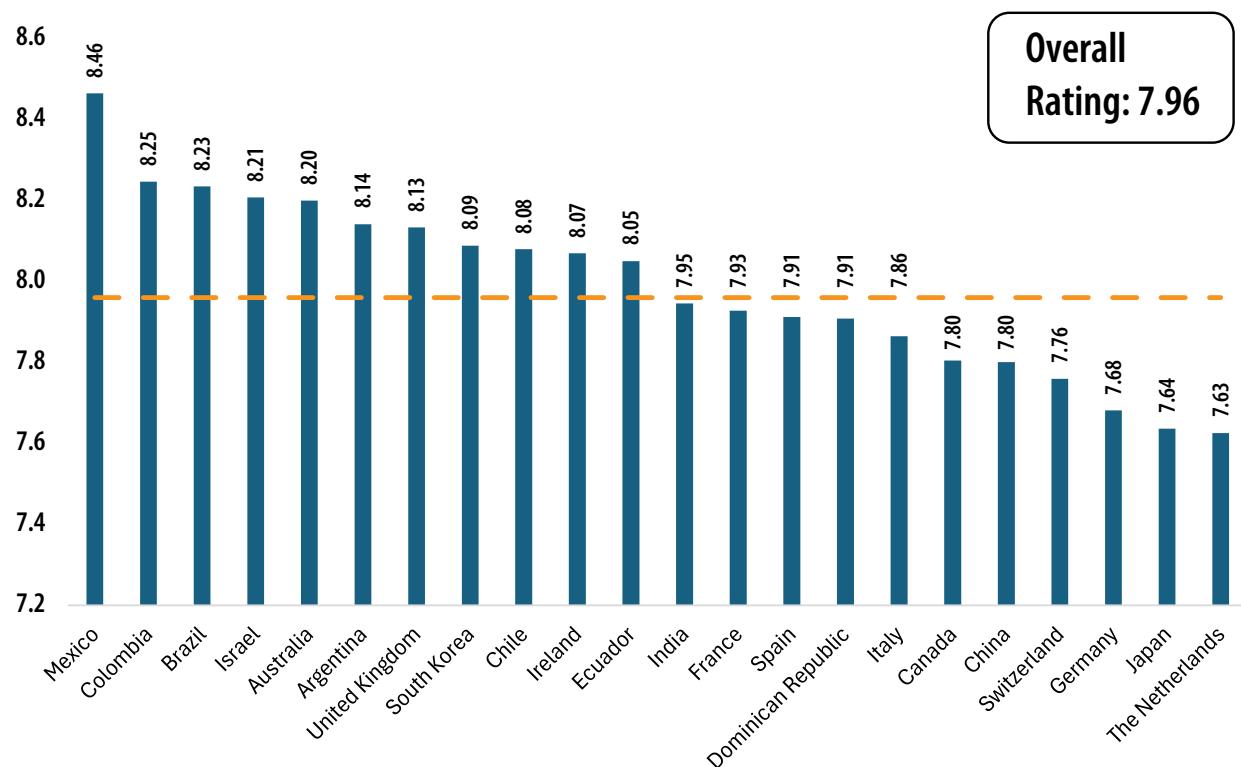
Census Division Ratings by Source Market

East South Central

Visitors from the Dominican Republic gave out the highest ratings in East South Central.

A slight majority of the monitored international markets provided higher ratings for East South Central than the overall score in 2023. As was the case in other census divisions, the highest scores came from Latin American markets, with the three highest being the Dominican Republic, Ecuador, and Argentina. Both European and Asian markets tended to give out lower scores, with the lowest being from Japanese, Chinese, and Spanish visitors.

**Rating of East South Central Division Region
by Individual Source Markets**

Overall
Rating: 7.91

Source Market	Rating
Dominican Republic	8.67
Ecuador	8.42
Argentina	8.37
Israel	8.33
Mexico	8.19
Colombia	8.19
United Kingdom	8.09
South Korea	8.07
Australia	8.03
Canada	8.00
Ireland	7.95
Brazil	7.92
Switzerland	7.74
The Netherlands	7.71
Italy	7.71
France	7.69
Chile	7.68
Germany	7.60
India	7.58
Spain	7.58
China	7.32
Japan	7.31
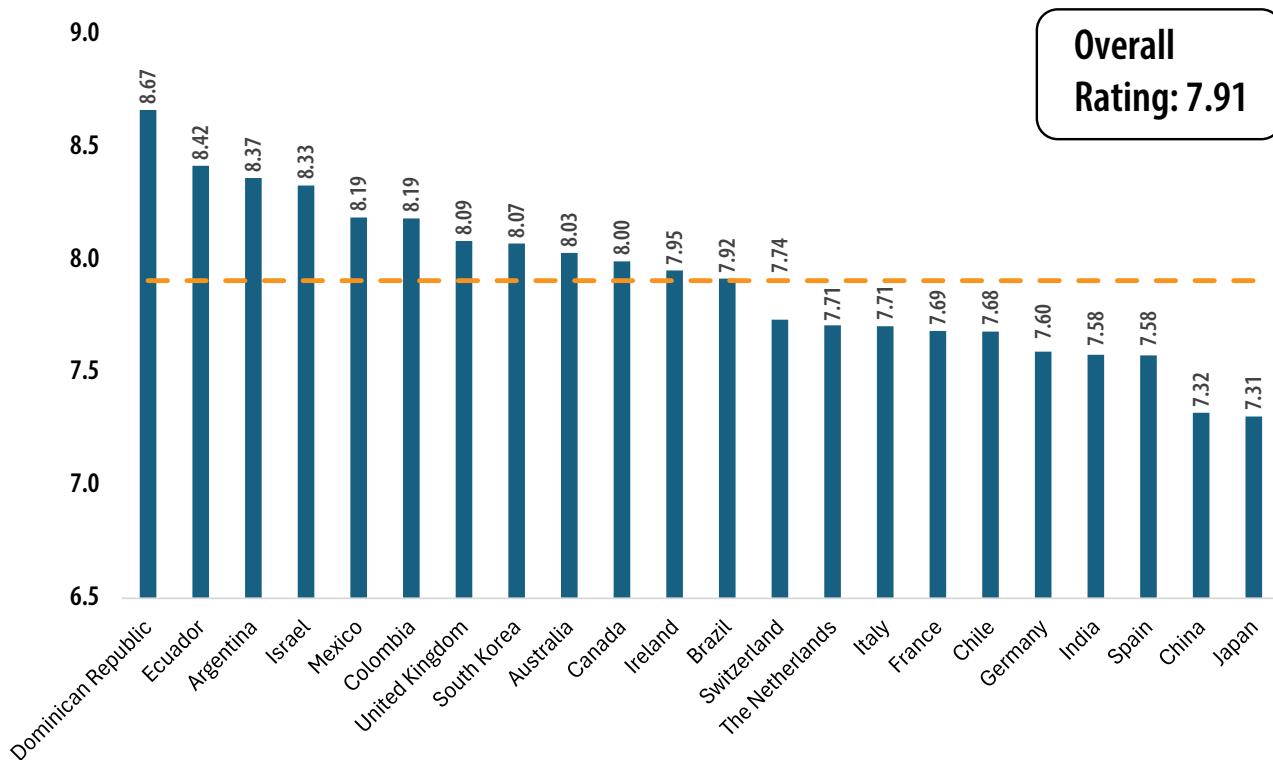
Census Division Ratings by Source Market

West South Central

West South Central managed to provide an excellent experience reputation to markets from several different continents.

A minority of the monitored markets scored above West South Central's overall rating in 2023. While the top three scores per market were namely from Latin American origin for all previous census divisions, they came from varying continents in West South Central. Visitors from the Dominican Republic presented the highest ratings, followed by those from Ireland, and finally Israel. The markets scoring lowest were, once again, from European or Asian origin, being Japan, Spain, and the Netherlands.

**Rating of West South Central Division
by Individual Source Markets**

Overall Rating: 7.78

Market	Rating
Dominican Republic	8.17
Ireland	8.10
Israel	8.09
Australia	8.07
Colombia	8.07
United Kingdom	8.06
Brazil	8.01
Canada	8.01
South Korea	7.98
Mexico	7.90
Argentina	7.84
Ecuador	7.81
China	7.77
India	7.77
France	7.76
Switzerland	7.74
Italy	7.67
Germany	7.60
Chile	7.59
The Netherlands	7.57
Spain	7.47
Japan	7.41
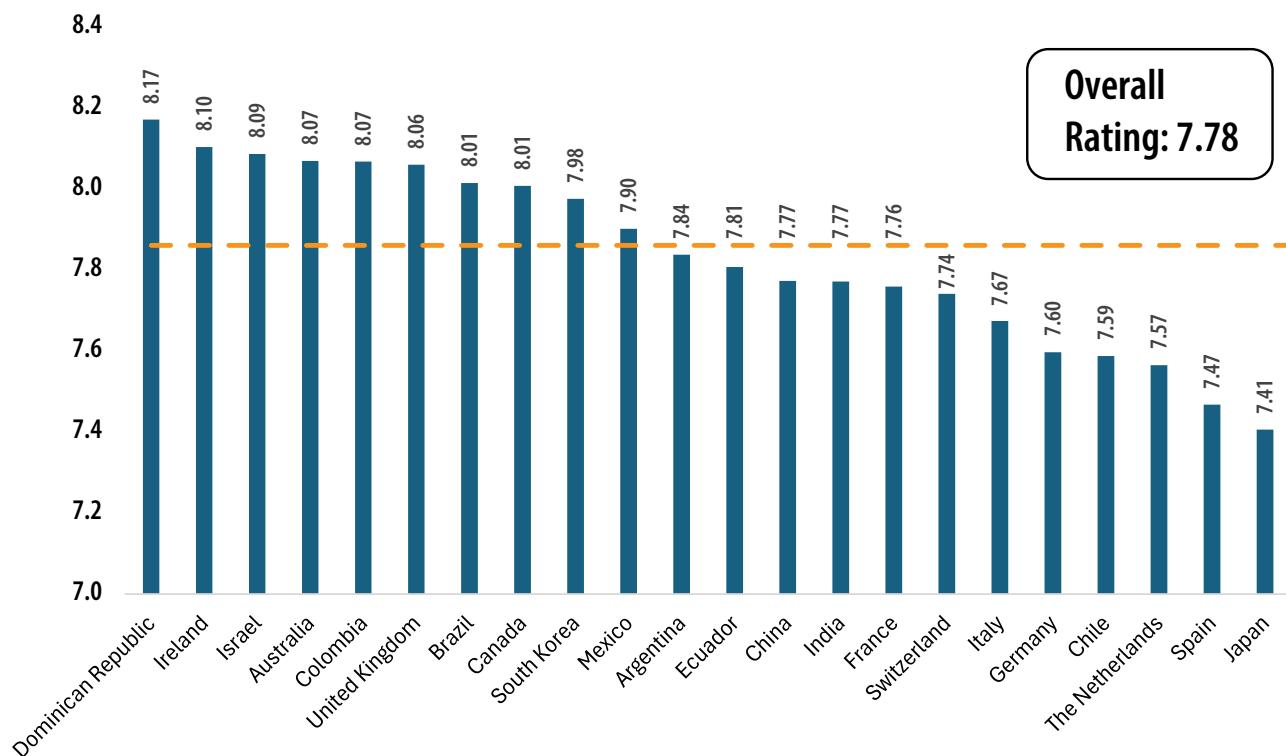
Census Division Ratings by Source Market

Mountain

Mountain obtained its highest ratings from Latin American markets.

A slight majority of the monitored markets' average scores for Mountain in 2023 fell below the census divisions overall rating. The highest ratings were obtained from Latin American markets, namely Mexico, the Dominican Republic, Ecuador, Colombia, and Brazil. A mix of both Asian and European markets provided the lowest scores, such as India, Japan, Spain, South Korea, and Germany.

**Rating of Mountain Division Region
by Individual Source Markets**

Overall Rating: 7.81

Market	Rating
Mexico	8.37
Dominican Republic	8.19
Ecuador	8.04
Colombia	8.00
Brazil	8.00
Israel	7.92
Argentina	7.90
United Kingdom	7.90
Ireland	7.89
China	7.83
Australia	7.80
Italy	7.79
Canada	7.76
France	7.75
Switzerland	7.75
The Netherlands	7.72
Chile	7.68
Germany	7.68
South Korea	7.60
Spain	7.57
Japan	7.40
India	7.38
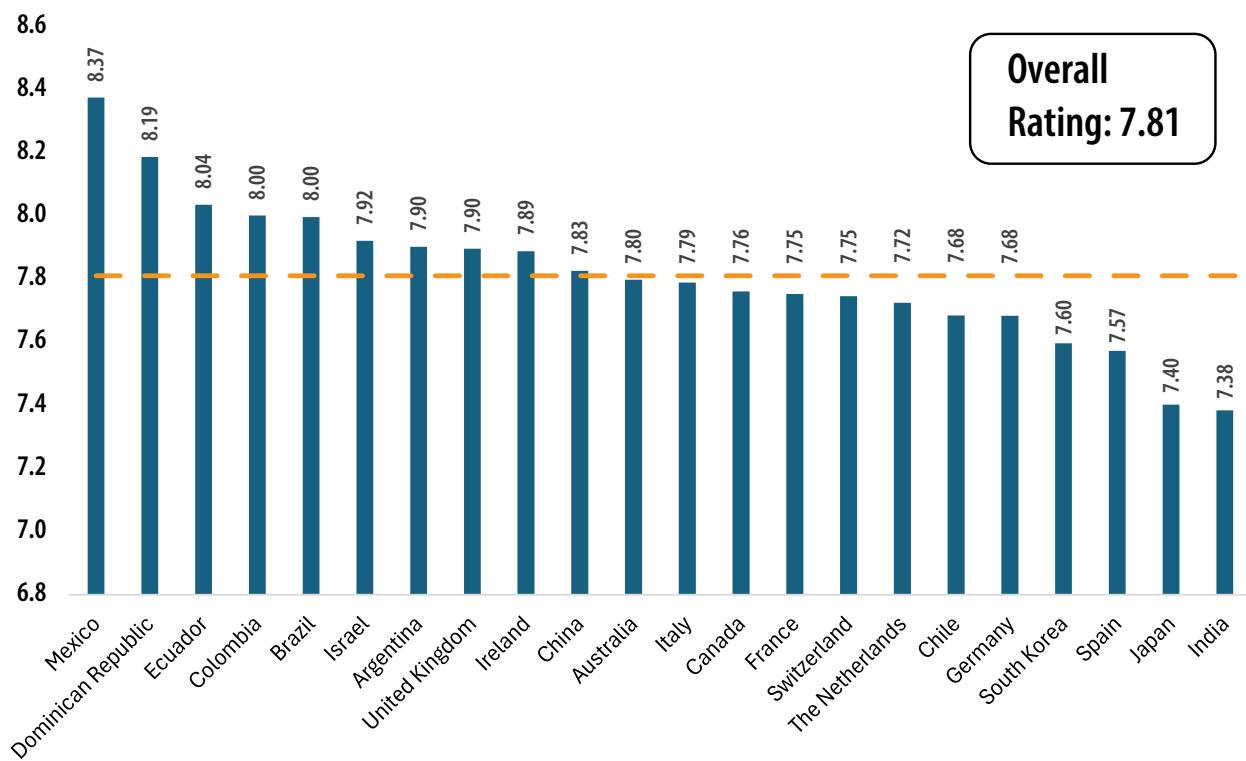
Census Division Ratings by Source Market

West North Central

West North Central delighted visitors from several corners of the globe.

Twelve out of 22 monitored international markets rated their experiences higher than the average score West North Central received in 2023. The four highest scoring markets came from several different countries, including Mexico, Ecuador, Australia, and China. Those that provided the lowest ratings on average were also from a variety of countries, with the only census division having a low rating from a country in Latin America. These were Ireland, the Dominican Republic, Italy, and Canada.

**Rating of West North Central Division Region
by Individual Source Markets**

Overall
Rating: 7.78

Market	Rating
Mexico	8.42
Ecuador	8.40
Australia	8.10
China	8.03
Colombia	7.99
Brazil	7.95
United Kingdom	7.93
Argentina	7.93
Israel	7.90
Chile	7.88
Switzerland	7.84
South Korea	7.81
India	7.78
Spain	7.77
The Netherlands	7.74
France	7.72
Germany	7.71
Japan	7.69
Canada	7.67
Italy	7.62
Dominican Republic	7.61
Ireland	7.46
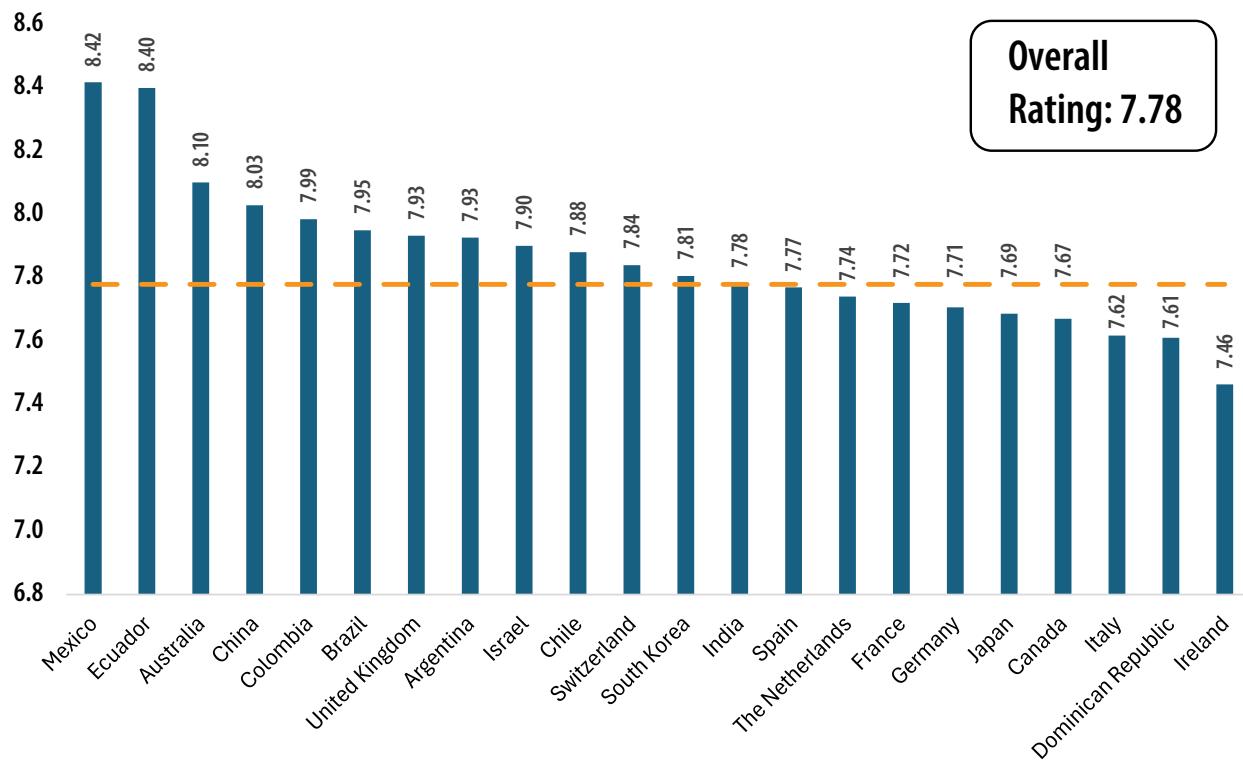
Census Division Ratings by Source Market

South Atlantic

The South Atlantic was rated highly by several Latin American markets.

An equal number of monitored markets scored their experiences in the South Atlantic above or below the average score from 2023. Once again, Latin American markets tended to give the highest scores, with the four highest ratings per market being from Mexico, the Dominican Republic, Brazil, and Ecuador. As has been the case in several other census divisions, the lowest scoring markets were a mix of Asian and European, such as Japan, Spain, India, and the Netherlands.

**Rating of South Atlantic Division Region
by Individual Source Markets**

Overall
Rating: 7.78

Market	Rating
Mexico	8.11
Dominican Republic	7.95
Brazil	7.95
Ecuador	7.94
Ireland	7.91
Colombia	7.89
United Kingdom	7.89
Australia	7.86
Argentina	7.85
Israel	7.82
South Korea	7.81
China	7.76
Canada	7.72
France	7.71
Italy	7.69
Chile	7.65
Germany	7.65
Switzerland	7.65
The Netherlands	7.54
India	7.54
Spain	7.48
Japan	7.37
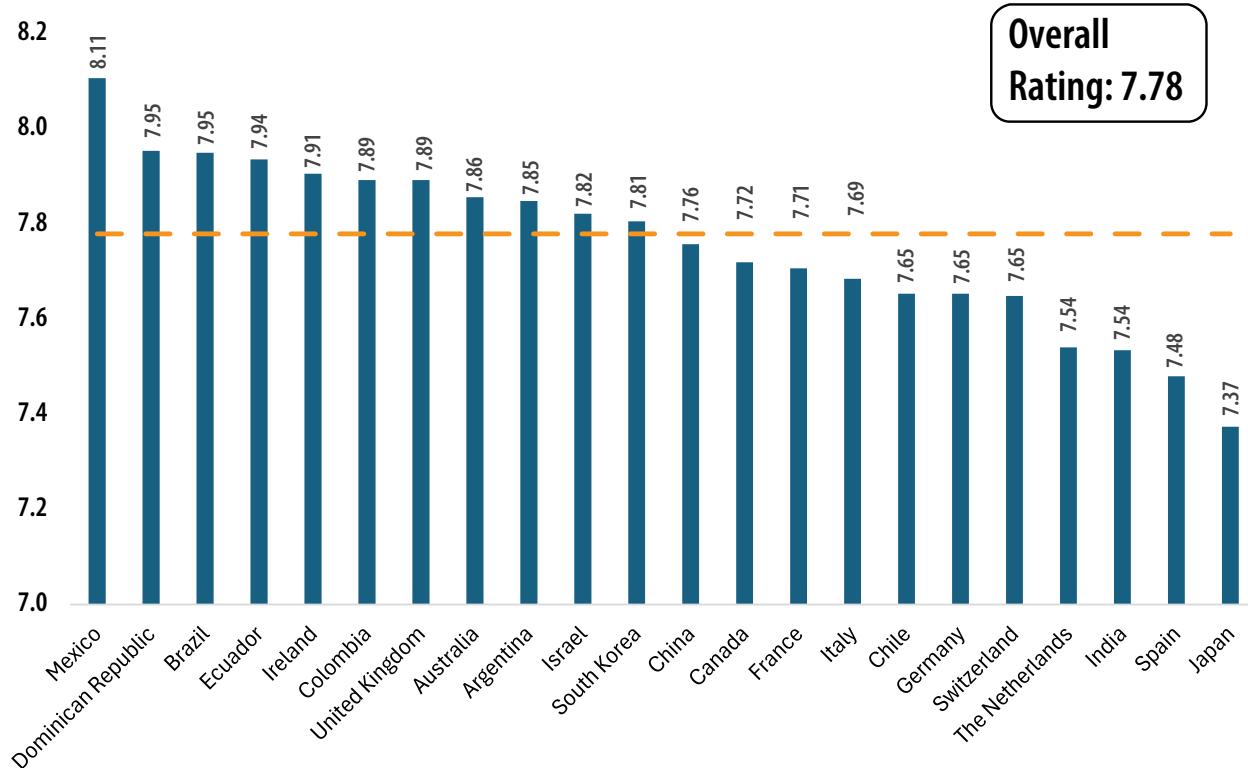
Conclusion

A country's international reputation as a global destination is primarily determined by the visitor experience, which is the top factor that influences a travelers' decision in choosing a destination.

All major source markets analyzed in this report had a favorable view of the United States as a global destination, and this favorable view extended to all nine Census divisions across the country.

The United States provided an overall competitive visitor experience for international travelers relative to other major global destinations across their entire trip. Overseas visitors rated the United States as either having a competitive advantage or being competitive in 9 of the 10 major categories analyzed in this report, an increase from 7 in the baseline 2019 report. Meanwhile, Canadian and Mexican visitors rated the United States as either having a competitive advantage or being competitive in 9 of the 10 major categories analyzed in this report, the same as the baseline 2019 report.

- Overseas visitors rated the United States Tourist Information Centers, Shopping, and Culture & Leisure experiences as the three most competitive categories of the visitor experience relative to other major global destinations.

- Canadian and Mexican visitors rated the United States Tourist Information Centers, Beach & Water, and Shopping experiences as the three most competitive categories of the visitor experience relative to other major global destinations.

Moreover, international visitors rated the United States as either having a competitive advantage or being competitive in more than 80 percent of all 50 components across all 10 major categories analyzed in this report.

- From the perspective of overseas visitors, the relatively small number of components (nine out of 50) where the United States was rated as uncompetitive was chiefly driven by the cost of the visitor experience.

- The Canadian/Mexican visitors' dissatisfaction (just six out of 50 components) was more varied.

This report also found that of the top five drivers that influence international visitor satisfaction globally (Local's hospitality, Accommodation experience, Safety feeling, Museums & historic sites and Crowding, convenience for visiting), United States had a competitive disadvantage from the perspective of both overseas visitors and Canada/Mexico visitors in just one driver in both 2019 and 2023.

- Canada/Mexico visitors rated the United States Local hospitality as uncompetitive in both 2019 and 2023.

- Overseas visitors rated the United States' Accommodation experience as uncompetitive in 2019 and Safety feeling as uncompetitive in 2023.

This report shows that variables outside the direct control of the travel industry have an impact on the United States' competitiveness as global destination—a fact that travel and tourism stakeholders should recognize.

Appendix A

A Comparison of 2019 and 2023 Survey Results, United States vs. Overseas Benchmark*

*All source market category and subcategory ratings (e.g., USA and Benchmarks) are rounded to the nearest whole number. Consequently, subtracting the Benchmark score from the U.S. score may result in a value that is one point higher or lower than the published Difference column.

Category and Subcategories	USA 2019	OVS Benchmark 2019	Difference USA-OVS 2019	USA 2023	OVS Benchmark 2023	Difference USA-OVS 2023	Change in USA 2019-2023	Change in OVS 2019-2023
Accommodation	191	205	-15	208	210	-2	18	5
Overall Quality	218	210	9	234	221	13	16	12
Hospitality of Personnel	204	221	-16	221	224	-3	17	3
Value for Money	149	186	-37	170	186	-16	21	0
Local Food	171	188	-17	175	191	-15	4	2
Diversity and Choice	184	184	0	189	187	2	5	3
Hospitality of Personnel	198	205	-7	200	210	-10	3	5
Overall Quality	175	194	-19	180	200	-19	5	6
Value for Money	127	170	-43	131	166	-35	4	-4
Transportation	158	148	10	168	164	4	10	16
Transportation Infrastructure (i.e. roads)	177	138	39	194	161	33	17	23
Ease of Finding Your Way Around Using Signage	176	144	32	182	162	20	6	18
Parking Convenience	135	107	28	142	122	20	7	15
Access to/from the Airport	187	177	10	202	198	4	15	21
Hospitality of Public Transit Personnel	170	144	26	162	160	2	-8	16
Hospitality at Entry Point	159	152	7	168	168	0	9	16
Taxi Service	122	131	-9	149	152	-3	27	21
Accessibility of Public Transportation	191	197	-6	195	204	-8	5	7
Cost of Transportation to Reach Destination	127	135	-8	124	134	-10	-3	0
Price of Public Transportation	136	157	-21	166	178	-12	30	21
Culture and Leisure	192	174	18	212	184	28	19	10
Amusement and Theme Parks	296	235	61	302	248	54	6	13
Theater, Opera, and Cultural Shows	183	156	28	208	168	40	25	12
Nightlife	179	159	20	198	164	35	19	4
Diversity and Range	209	198	11	239	210	29	30	12
Guided Tours	183	177	7	201	182	18	17	6
Price of Leisure Activities	103	120	-17	121	132	-11	19	13
Shopping	199	171	28	205	170	35	6	-1
Range of Shopping Possibilities	243	193	50	262	193	69	19	0
Hours/Days of Operation	226	187	39	239	188	51	13	1
Hospitality of Personnel	199	171	28	206	170	36	7	0
Value for Money	164	137	27	155	134	21	-9	-3
Quality of Handicrafts and Souvenirs	164	168	-4	163	163	0	0	-5

A Comparison of 2019 and 2023 Survey Results, United States vs. Overseas Benchmark

Category and Subcategories	USA 2019	OVS Benchmark 2019	Difference USA-OVS 2019	USA 2023	OVS Benchmark 2023	Difference USA-OVS 2023	Change in USA 2019-2023	Change in OVS 2019-2023
Historical Heritage	193	206	-13	206	205	1	14	-1
Convenience of Visiting Popular Tourist Attractions and Crowdedness	169	166	4	193	168	24	23	3
Entrance Fees	139	156	-17	157	151	7	18	-5
Hospitality of Personnel	224	218	6	223	218	6	0	0
Management and Maintenance	221	226	-6	227	229	-2	6	2
Diversity and Range	211	263	-52	231	261	-29	20	-2
Tourist Information Centers	164	140	24	194	153	41	30	13
Smartphone Application	167	135	32	196	147	48	29	13
Hours/Days of Operation	175	157	18	207	161	46	32	4
Efficiency of Personnel	167	145	22	192	153	39	25	8
Number of Information Centers	148	123	24	182	151	31	34	28
Beach and Water	233	217	16	235	235	19	21	18
Cleanliness and Upkeep	249	200	48	221	221	32	4	21
Water Activities	216	199	17	217	217	25	26	18
Safety for Swimming	227	198	29	223	223	23	19	24
Diversity and Range	217	223	-6	235	235	12	30	12
Beauty of Beach	257	264	-7	280	280	1	24	16
Environment	198	179	19	180	180	3	-15	1
Architecture and Urban Development	202	169	33	173	173	18	-10	4
Cleanliness of Outside Cities	190	147	43	162	162	16	-12	16
Cleanliness of Public Areas	177	151	26	168	168	3	-6	17
Commitment to the Environment	NA	NA	NA	143	143	-5	NA	NA
Beauty of Landscapes	221	247	-26	252	252	-17	14	5
Local Hospitality and Feeling of Safety	196	180	17	188	188	12	3	8
Ease of Communication with Locals	210	152	58	165	165	55	9	13
Hospitality of Locals	194	196	-2	202	202	-1	7	6
Safety and Feeling of Security	185	191	-6	197	197	-18	-6	6
General KPIs	118	123	-5	116	116	-3	-4	-6
Intention to Repeat Visit	62	49	13	51	51	16	5	2
Overall Fulfillment of Expectations	204	208	-4	200	200	1	-4	-8
Net Promoter Score	57	58	-1	46	46	1	-10	-12
Overall Value for Money of the Stay	147	178	-31	169	169	-29	-7	-9

Appendix B

Comparison of 2019 and 2023 Survey Results, United States vs. Canada-Mexico Benchmark

Category and Subcategories	USA 2019	CanMex Benchmark 2019	Difference USA-CanMex 2019	USA 2023	CanMex Benchmark 2023	Difference USA-CanMex 2023	Change in USA 2019-2023	Change in CanMex 2019-2023
Accommodation	246	212	34	257	239	18	11	27
Overall Quality	268	213	56	282	241	41	13	28
Value for Money	199	180	18	215	205	9	16	25
Hospitality of Personnel	271	243	28	275	270	4	4	28
Local Food	222	205	16	250	222	28	28	16
Diversity and Choice	253	192	60	267	204	64	15	12
Overall Quality	233	225	9	260	233	27	26	8
Hospitality of Personnel	233	227	6	275	250	25	42	23
Value for Money	169	178	-9	199	200	-2	30	22
Transportation	217	180	37	232	202	30	15	22
Parking Convenience	201	76	125	213	106	107	11	30
Ease of Finding Your Way Around Using Signage	255	166	89	256	195	61	1	30
Transportation Infrastructure (i.e., roads)	270	192	78	261	203	59	-8	11
Hospitality at Entry Point	201	179	22	249	191	58	48	12
Taxi Service	190	158	32	222	185	37	32	27
Cost of Transportation to Reach Destination	157	136	21	184	156	28	27	20
Access to/from the Airport	275	220	55	265	245	20	-10	25
Hospitality of Personnel on Public Transport	174	196	-22	212	221	-8	38	24
Price of Public Transport	200	206	-7	226	239	-13	26	32
Accessibility of Public Transport	242	267	-25	231	275	-44	-11	8
Culture and Leisure	255	207	48	256	221	35	1	14
Nightlife	276	203	73	275	205	70	-1	2
Amusement and Theme Parks	359	257	103	329	270	59	-30	14
Theater, Opera, and Cultural Shows	243	185	58	246	204	42	3	19
Diversity and Range	273	242	31	272	252	20	-1	10
Guided Tours	242	226	16	255	237	18	13	11
Price of Leisure Activities	134	128	7	159	157	2	24	29
Shopping	242	170	72	254	193	60	12	23
Range of Shopping Possibilities	304	185	118	299	210	90	-4	24
Hours/Days of Operation	278	165	113	276	186	90	-2	22
Hospitality of Personnel	228	183	45	258	210	47	30	27
Value for Money	194	128	66	201	155	46	7	27
Quality of Handicrafts and Souvenirs	205	190	16	234	206	29	29	16

Comparison of 2019 and 2023 Survey Results, United States vs. Canada-Mexico Benchmark

Category and Subcategories	USA 2019	CanMex Benchmark 2019	Difference USA-CanMex 2019	USA 2023	CanMex Benchmark 2023	Difference USA-CanMex 2023	Change in USA 2019-2023	Change CanMex 2019-2023
Historical Heritage	260	267	-8	280	292	-12	21	25
Hospitality of Personnel	281	276	5	312	308	4	30	31
Convenience of Visiting Popular Tourist Attractions and Crowdedness	227	224	3	249	251	-2	23	28
Entrance Fees	226	217	9	239	242	-3	13	25
Management and Maintenance	289	296	-6	290	316	-25	1	20
Diversity and Range	275	323	-48	311	344	-33	36	21
Tourist Information Centers	232	164	68	247	183	63	15	19
Smartphone Application	244	149	95	254	177	77	10	28
Number of Information Centers	204	148	56	227	159	68	23	11
Hours/Days of Operation	243	176	67	260	197	62	17	21
Efficiency of Personnel	237	184	53	246	201	46	9	16
Beach and Water	324	239	85	317	255	62	-7	16
Water Activities	318	198	120	306	210	96	-12	12
Cleanliness and Upkeep	335	201	135	327	235	92	-8	34
Safety for Swimming	310	235	75	308	255	53	-2	19
Beauty of Beach	354	298	56	344	308	36	-10	10
Diversity and Range	304	262	43	299	268	31	-5	6
Environment	254	229	25	251	240	11	-3	11
Cleanliness of Outside Cities	247	200	47	259	216	43	12	16
Cleanliness of Public Areas	239	183	56	236	203	33	-3	20
Architecture and Urban Development	262	227	35	256	234	22	-6	8
Commitment to the Environment	NA	NA	NA	222	231	-9	NA	NA
Beauty of Landscapes	269	307	-38	283	315	-32	15	9

A Comparison of 2019 and 2023 Survey Results
United States vs. Canada-Mexico Benchmark Markets

Category and Subcategories	USA 2019	CanMex Benchmark 2019	Difference USA-CanMex 2019	USA 2023	CanMex Benchmark 2023	Difference USA-CanMex 2023	Change in USA 2019-2023	Change in CanMex 2019-2023
Local Hospitality and Feeling of Safety	232	219	13	256	239	16	24	21
Ease of Communication with Locals	247	189	57	276	211	65	30	21
Safety & feeling of security	238	221	18	237	242	−5	−1	22
Hospitality of Locals	211	246	−35	254	265	−11	43	19
General KPIs	139	134	5	146	140	6	8	6
Intention to Repeat Visit	66	48	18	74	50	24	8	2
Overall Value for Money of the Stay	203	192	10	214	209	5	11	17
Overall Fulfillment of Expectations	226	228	−2	239	235	4	13	7
Net Promoter Score	60	68	−8	58	66	−8	−2	−2