

Chapter 4:

Focus on the US



Featured in this section cover is the city of Phoenix, Arizona. It entered the top 5 city destinations with the highest demand in growth between November-December 2022.

Strong Domestic Recovery, International Travel Still Catching Up

In the last quarter of 2022, domestic leisure and business travel continued to lead the recovery. Americans' desire to travel internationally was strong and is reflected in the number of international departures. Arrivals were still behind mainly due to long visa wait times.

81%

was the estimated volume of [international US departures](#) compared to 2019. The most popular destinations among Americans are the Caribbean and Europe.

63%

was the estimated [inbound travel volume](#) for the US in 2022 when compared to 2019. For 2023, the U.S. Travel Association estimates the recovery will reach 75% of 2019 volumes.

52%

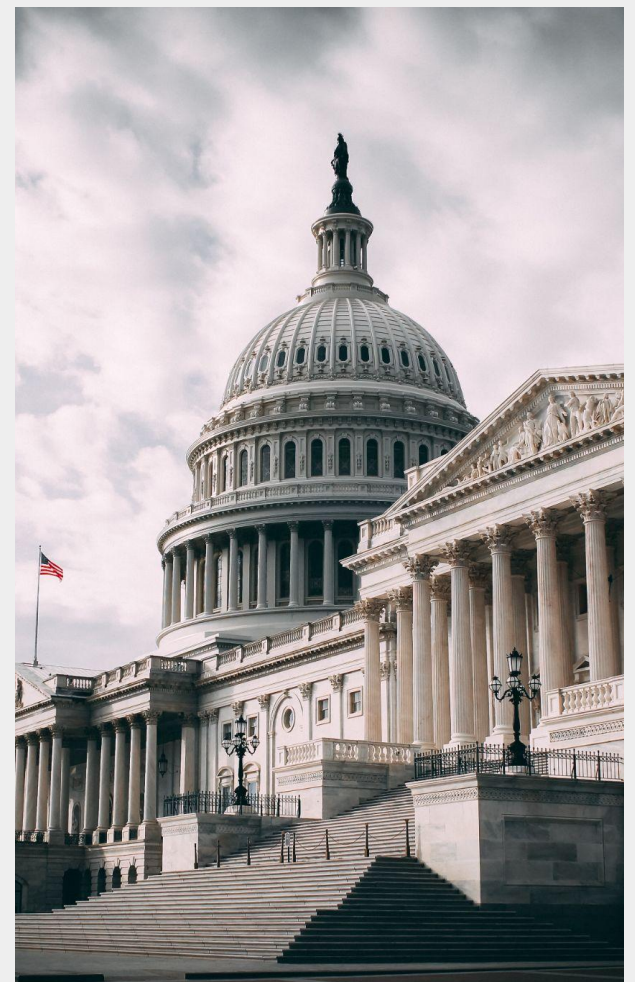
was the estimated [international travel spend for 2022](#) compared to 2019. Domestic spending in the US reached 91% from the pre-pandemic levels and is estimated to recover fully by 2024.

A Cabinet-Level Representation for Travel

At the end of 2022, the [Omnibus Travel and Tourism Act](#) bill passed the US Senate. The legislative proposal includes specific measures to enhance travel recovery after the COVID-19 pandemic. It also creates [a new cabinet-level function](#), the office of Assistant Secretary of Commerce for Travel and Tourism. This role will offer more representation for the travel industry as a driver of economic growth. The assistant secretary will lead the national travel policy and coordinating across agencies.

The US is the only G20 country that didn't have a cabinet-level function dedicated to the travel industry. The idea floated around since [1995](#) but was put on the shelf due to other political interests. It started to be brought back into the discussion since COVID-19, to support the recovery of the sector.

Short-term, the assistant secretary will focus on reducing visa wait times and accelerating travel recovery. Long-term, it will look for ways to improve US competitiveness across the global travel market.



#TheyWaitWeLose - Visa Processing Affected International Arrivals

In Q4 2022, visa wait times continued to impact international travel recovery in the US. First-time applicants had to wait more than [400 days](#) to get their visas approved. These delays slowed international arrivals and had a huge impact on travel spending.

6.6

million potential travelers [may not be able to visit the US](#) in 2023 due to visa approval wait times.

These delays can bring an estimated economic loss mounting to \$11.6 billion.

66%

of travelers from Brazil, India, and Mexico [would likely choose another destination](#) because of the long visa wait times.

The Travel Industry Reacts

The travel industry quickly reacted by raising awareness and proposing advocacy initiatives to decrease wait times.

U.S. Travel Association, the leading voice of the industry, was especially active by launching the "[They Wait, We Lose](#)" campaign, aimed at putting pressure on national authorities to prioritize this problem.

Among the solutions for reducing processing times proposed by the U.S. Travel Association are:

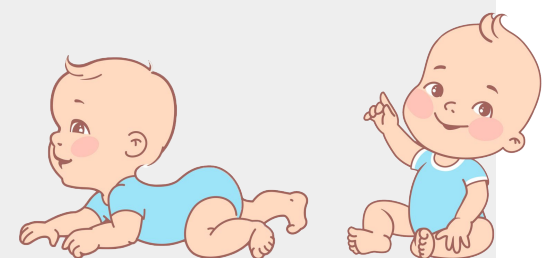
- Set clear objectives to reduce wait time to 21 days until April 2023.
- Reduce interview appointment time to 21 days.
- Allocate more staffing and resources for countries with a high volume of applicants.
- Apply a more flexible waiver policy for renewals.

Visit Mars Before Your Visa Gets Approved

Aside from advocacy initiatives, The U.S. Travel Association also took a playful approach to highlight how incredibly long the entire process is. They created an infographic listing [ten things to be done](#) while waiting for the visa to get approved.

"A child born on the day a visa request was submitted should be able to stand, walk and say a few simple words by the time the request is completed."

The U.S. Travel Association

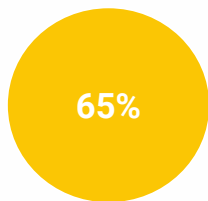


F&B Improving Performance Scores

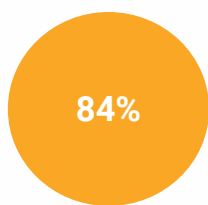
Since 2008, TrustYou has collected and analyzed guest reviews from the largest variety of global sources. Hotels, DMOs and management companies can benefit from one of the industry's most elaborate feedback databases.

The platform showcases a comprehensive overview of reviews, sources, and sentiments.

Here's the overview of the fourth quarter for the US:



65% of the US review volume has been reached in comparison to Q4 2019 reviews.
Our data shows a steady recovery.



84% of all feedback is positive.
This number is slightly higher compared to Q3 2022, when positive feedback was at 82%. Collecting more reviews leads to a higher probability of increasing your hotel's rating.

Impact Scores

Impact Scores help identify how specific categories in a hotel, such as, "good housekeeping" influence a hotel's Performance Score in a particular time frame. This key KPI can close the gap between guest sentiments and a hotel's score.

The **Top Impact Scores** feature a newcomer. For the first time this year, we see **Bar** entering among the categories with a positive influence on performance. The F&B experience is very important for US guests during winter and fall holidays.

There are no changes to the **Bottom Impact Scores**. Compared to other regions, where **WiFi** and **Price** share first and second place, **Room** is first in the bottom categories that can negatively affect the performance score of a hotel.

