International Visitor Satisfaction Study of the United States

Measuring the Competitiveness of the United States vs. Other Global Destinations

Baseline 2019 Report

National Travel and Tourism Office
Industry & Analysis
International Trade Administration
U.S. Department of Commerce

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Executive Summary

Travel and tourism is a unique industry, which is defined not by the product or service produced, but rather by 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 2019, travelers from other countries spent $239 billion visiting the United States. This spending accounted for 9.4% of total U.S. exports of goods and services. That same year, international travel to the United States generated 10.8% of global travel exports, more than any other country.

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, more than advertising, proximity, or special offers and deals.

The purpose of this study is to provide foundational research to identify the parts of the 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 of this study highlight the strengths of the United States as an international destination and areas which are weaknesses to prospective international visitors.

This study provides new groundbreaking research that supports efforts to increase the competitiveness of the U.S. travel and tourism industry as NTTO works to assist the travel industry meet the goals of the National Travel and Tourism Strategy.

This baseline report (the first of a series) is based on the visitor experience in 2019, before the global pandemic. The next report in the series will be based on the visitor experience in 2023.

Section 1 of this report measures the United Sates' travel and tourism industry's international competitiveness through survey analysis.

- For overseas visitors, the United States had a competitive advantage in 7 of the 10 categories of the visitor experience and a competitive disadvantage in three compared to the competition (other global destinations visited by the United States' major overseas source markets).
  - The United States had a competitive advantage in nearly half (24) of the 49 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 was competitive in one compared to the competition (other global destinations visited by Canadian and Mexican international travelers).
  - The United States had competitive advantage in more than two-thirds (35) of the 49 components across all 10 visitor experience categories; was competitive in 9 components; and had a competitive disadvantage in 5 components.

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[1]National Travel and Tourism Office (NTTO), Industry & Analysis, International Trade Administration, U.S. Department of Commerce
[2]Oxford Economics' Global Travel Service

Section 2 of this report measures the United States' travel and tourism industry's international competitiveness through internet-based ratings 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 **rated their experiences highest** in the states comprising **West South Central** and **East South Central** census divisions.

Key Takeaways of the Study

1. The United States offers a **generally satisfying and competitive experience** across the entire visitor journey, **without any major weaknesses** that could harm its reputation.
2. The competitive advantage is **more pronounced for neighboring markets** (Canada and Mexico) who often find a better experience across the border than elsewhere, while **distant markets are less enthusiastic about the value for money.** However, the size of the country and its diversity generate **high intentions to revisit** compared to competitors for both segments of markets: overseas and Canada & Mexico.
3. The United States has a **competitive advantage** in several key criteria essential to visitor satisfaction, notably **ease of communication, cleanliness, mobility, and visitor assistance.**
4. The United States also stands out for an **exceptional entertainment experience** (amusement parks, shows, nature/outdoor adventures…) and outperforms in **shopping experiences, beaches, and urban architecture.** Visitors describe the United States as a great playground and adventure terrain in an environment that's very easy to navigate.
5. **Lodging and food,** key points of the visitor experience, suffer from a **lack of quality consistency** (especially in hotels and quick-bites). Niche experiences like a night camping or at a ranch, or fine dining, delight visitors.
6. A majority of the areas where the United States had a **competitive disadvantage** regarding overseas visitors involved the **price** or the **value for money** of the U.S. travel experience.
7. **Shopping emerges as a major competitive advantage** for the United States, only tainted by the souvenirs and crafts component of the Shopping category, which is less well-rated than elsewhere.
8. Averaging ratings per Census Divisions, visitors reported the **most satisfying experiences in the West South-Central region,** particularly due to the favorable impressions of the staff, **and in the East South-Central region,** where the entertainment value greatly contributed to visitor satisfaction. The Mountain and South Atlantic regions scored slightly lower comparatively, yet they still maintained a high level of visitor satisfaction.
9. To increase post-visit recommendations vs. the competition, the United States should work on **several weak facets of the visitor journey:** the *hospitality of personnel in the accommodations and public transportation industries,* the valorisation of landscapes (increasing international visitors appreciation) outside iconic parks and nature destinations, the general quality of its hotel and dining offers, and the reception of Canadian and Mexican visitors by staff and by the local population (#1 driver of visitor satisfaction).

Introduction

Travel and tourism is a critical driver of economic growth and employment in the United States. In 2019, travel and tourism accounted for 3% of U.S. gross domestic product (GDP) and through $2.2 trillion of economic activity, supported 11.4 million American jobs, or approximately one in every 14 jobs in the United States.[3]

Travel and tourism is a unique industry, which is not defined not by the product or service produced, but rather by the customer, who is referred to as a "visitor."

The Bureau of Economic Analysis 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).[4]

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 2019, travelers from other countries spent $239 billion visiting the United States. This spending accounted for 9.4% of total U.S. exports of goods and services.[5] That same year, international travel to the United States generated 10.8% of global travel exports, more than any other country.[6]

Following a historic global decline during the COVID-19 pandemic, international travel is recovering. By 2023, international arrivals to the United States of 66.5 million reached 84% of 2019 levels while travel exports of $213 billion reached 89% of 2019 levels. Continued growth of international travel to the United States is of great importance to the travel industry as well as the county's overall economy.

Like all industries, the competitiveness of travel and tourism is largely based on its reputation with its customer base versus the competition. In the case of international travel to the Unted States, the competition is composed of other major global destinations that attract similar market profiles of international travelers as that of the United States.

Globally, a country's international reputation as a destination is primarily determined by the visitor experience, which is the #1 factor (investigated in the survey) that influences travelers' decisions in choosing a destination, more than advertising, proximity, or special offers and deals. The quality of experience in the form of reputation that international travelers share with their friends and relatives following an international trip drives the decision making of future travelers to that country more than any other factor (see Figure 1).

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[3] Travel and Tourism Satellite Account (2019), Bureau of Economic Analysis, U.S. Department of Commerce
[4] U.S. Travel and Tourism Satellite Account for 2018-2022, Survey of Current Business, Bureau of Economic Analysis, U.S. Department of Commerce.
[5] NTTO, I&A, ITA
[6] Oxford Economics' Global Travel Service

This report by the National Travel and Tourism Office (NTTO), part of the International Trade Administration's (ITA) Industry and Analysis (I&A) unit, is the first in a series of reports that measures the competitiveness of the U.S. travel and tourism industry over time based on the experience of the international visitor. Using 2019 data as the baseline 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. A second report covering 2023 is being released along with this report.

Figure 1. Influence of Destination Selection Criteria

Visitors to the U.S. and Competitors

Criteria	Percentage
Friends & relatives experience	37%
Advertising	12%
Proximity	9%
Special offers & deals	8%

Source: TCI Research, Travelsat
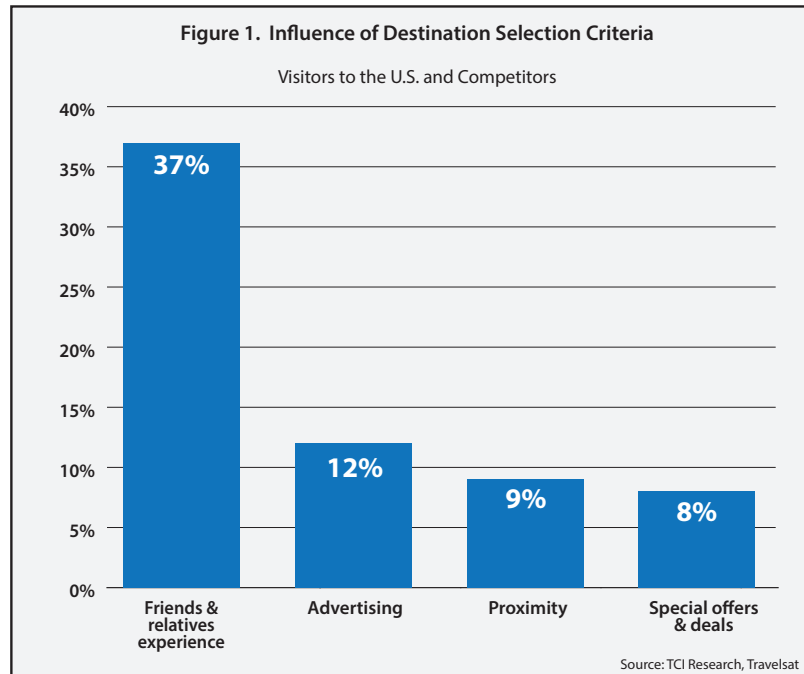
For this baseline report, NTTO commissioned MMGY TCI Research to assist with the research and analysis. TCI Research is a part of MMGY Global, a leading global integrated travel and hospitality marketing firm. Founded in 2010, MMGY TCI Research has amassed an international client roster of more than 150 travel organizations, ranging from destinations such as France, London and Aruba to well-known attractions like Disneyland Paris.

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

- Section I measures the international competitiveness of the U.S. travel and tourism industry through survey analysis.
- Section II measures the international competitiveness of the U.S. travel and tourism industry through online ratings and reviews.

Section 1. U.S. Travel and Tourism Industry's International Competitiveness through Survey Analysis

A. Survey Methodology and Analysis

The TRAVELSAT© Competitive Index is recognized worldwide as an independent benchmark to gauge the competitiveness of destinations based on visitor experience ratings. Awarded the Ulysses Prize by the UNWTO in 2011 for its excellence and innovation in improving destination governance, TRAVELSAT© has since been utilized by over 150 destinations and tourism stakeholders globally. It has been established as the most extensive platform for analyzing visitor satisfaction.

The competitive benchmarking covers over 60 indicators related to the visitor experience at all stages of the journey. The robust methodological approach encompasses survey analytic:

- Survey data from the TRAVELSAT© Competitive Index Database – 1,672 interviews covering results of international visitors to the United States prior to the COVID-19 pandemic (2019 and before);
- Comparisons of visitor satisfaction scores of the United States vs. two competitive norms (Overseas Visitor Satisfaction of the **USA (OVS Markets)** vs. **OVS Benchmark,** and Canada/Mexico Visitor Satisfaction of the **USA (CanMex)** vs. **CanMex** Benchmark. The reason for dividing this analysis into Overseas vs. Canada & Mexico is that from 2015 to 2019, visitors from overseas countries accounted for 50.2% of international visitors to the United States while visitors from Canada and Mexico accounted for 49.8%. Additionally, the unique geographical position of the United States vis-á-vis Canada and Mexico compared to that of farther international markets creates a different degree and context of visiting potential which merits the separation of visitor experience data.

OVS Benchmark: a group of 15 counties that represents other top international long-haul[7] destinations for the United States' top overseas[8] source markets.

OVS Benchmark represents the United States' major competition in global long-haul travel, and includes the following countries: **France, Spain, the United Kingdom, Italy, Germany, Thailand, the UAE, Canada, China, Mexico, Portugal, Egypt, Morocco, India, and Russia.** Survey results are weighted based on international visitor arrivals for each country.

CanMex Benchmark: A group of 14 counties that represents other top international destinations for Canadian and Mexican international travelers.

CanMex Benchmark represents the United States' major competition in international travel for visitors from Canada and Mexico and includes the following countries: **France, Cuba, Mexico, Spain, the United Kingdom, Italy, Japan, Portugal, Germany, India, China, Greece Thailand, and the UAE.** Survey results are weighted based on international visitor arrivals for each country.

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[7] To other regions of the world
[8] Excluding Canada and Mexico

How to interpret TRAVELSAT© Indexes

- ▪ The TRAVELSAT© Competitive Index applies a standard proprietary scoring scale from 1 to 10.
- ▪ The index reflects the level of satisfaction for each rated criterion, and typically fluctuates from -50 to 400.
- ▪ Scores from extremely satisfied or dissatisfied visitors, being 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.
- ▪ The main function of indexes is to benchmark a destinations' experience quality to that of the average competition.
- ▪ A difference of 10 points or more between a U.S. score and either the OVS Benchmark or the CanMex Benchmark score is statistically significant:
  - ⛿ U.S. score +10 points higher than OVS or CanMex Benchmark score: *the United States has a statistically significant Competitive Advantage*
  - ⛿ U.S. score within ±10 points of OVS or CanMex Benchmark score: *no significant difference, the United States is Competitive*
  - ⛿ U.S. score -10 points lower than OVS or CanMex Benchmark: *the United States has a statistically significant Competitive Disadvantage*

The example below illustrates how the United States compares to the OVS Benchmark for a particular overseas visitor experience category and its three components.
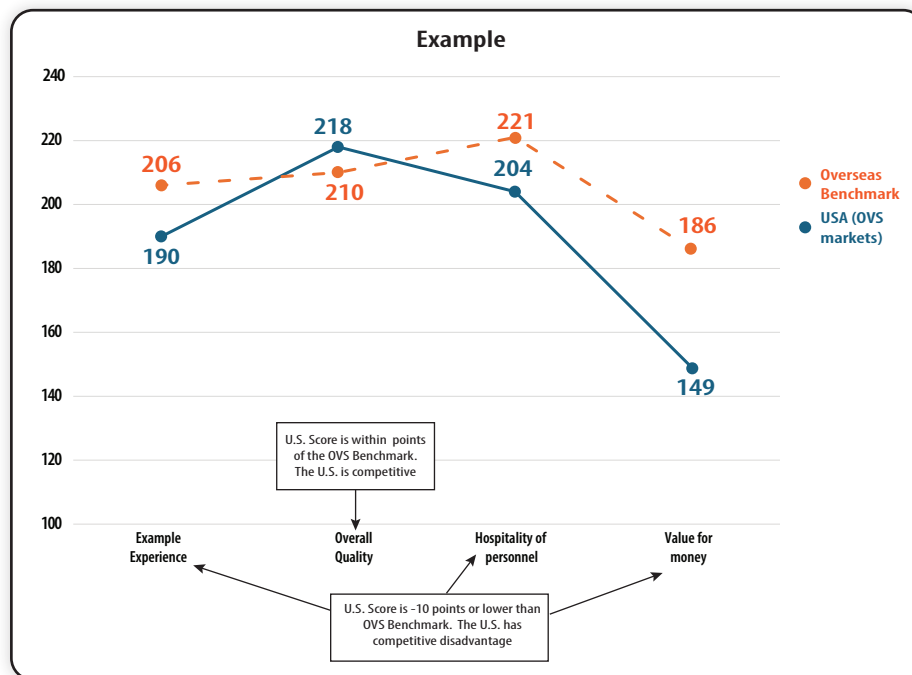
In this example, the United States has a statistically significant competitive disadvantage compared to the Overseas Benchmark (190 is more than 10 points lower than 206). Looking at the components, a competitive score in Overall quality is more than offset by competitive disadvantages in Hospitality of personnel and Value for money.

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Visitor Profile: Profile of Respondents having traveled to the United States

Total
- 1672 Interviews

Gender
- Female: 48%
- Male: 52%

Age
- 18 - 34 years: 35%
- 35 - 49 years: 35%
- 50+ years: 30%

Markets

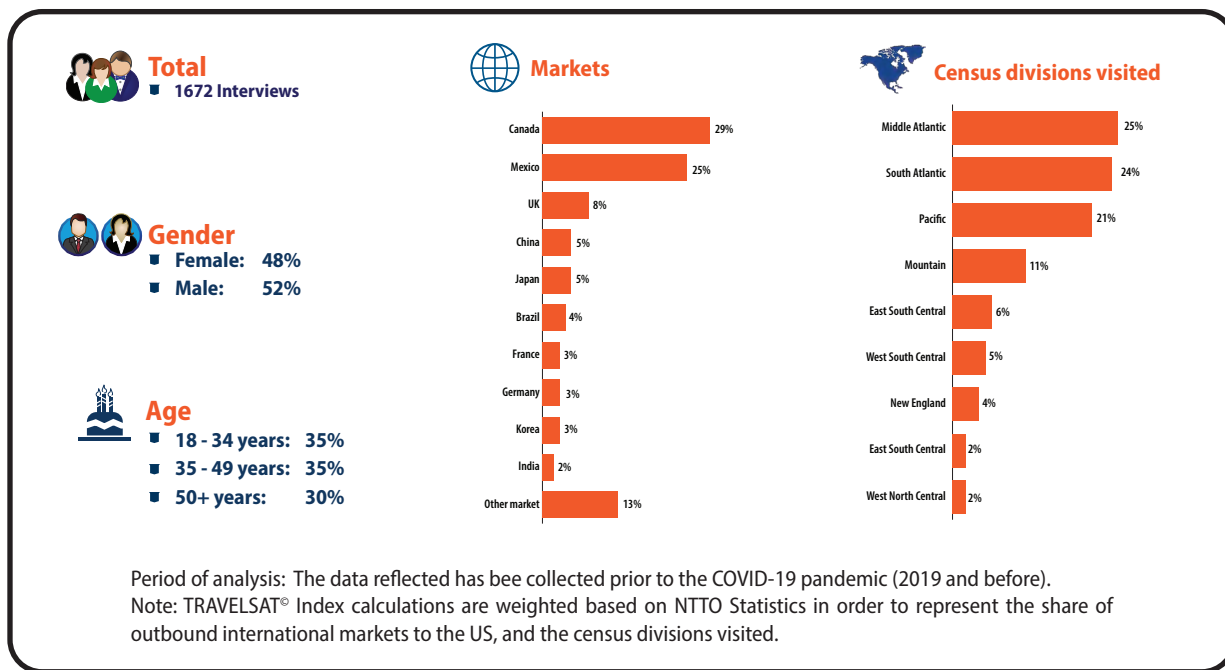| Market	%
Canada	29%
Mexico	25%
UK	8%
China	5%
Japan	5%
Brazil	4%
France	3%
Germany	3%
Korea	3%
India	2%
Other market	13%

Census divisions visited

Division	%
Middle Atlantic	25%
South Atlantic	24%
Pacific	21%
Mountain	11%
East South Central	6%
West South Central	5%
New England	4%
East South Central	2%
West North Central	2%

Period of analysis: The data reflected has bee collected prior to the COVID-19 pandemic (2019 and before).
Note: TRAVELSAT© Index calculations are weighted based on NTTO Statistics in order to represent the share of outbound international markets to the US, and the census divisions visited.

The TRAVELSAT© Survey
COMPETITIVE INDEXES COVERING ALL ASPECTS OF THE VISITOR EXPERIENCE

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

Local food
- Overall quality
- Diversity & choice
- Hospitality of restaurant personnel
- Value for money

Historical heritage (monuments, museums…)
- Diversity and range of historic sites and monuments
- Management & 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 & crowd

Environment
- Beauty of landscapes
- Cleanliness of public areas
- Cleanliness outside cities
- Architecture and urban development Tourist

information centers
- Number of information centers available
- Efficiency of personnel
- Opening hours & day

Beaches & water activities
- Beauty
- Diversity & range of beaches
- Cleanliness & upkeep
- Safety for swimming
- Water activities

Local people hospitality & safety feeling
- Hospitality of local inhabitants
- Ease of communication with local people
- Safety, feeling of security

Overall experience (KPIs)
- Overall expectations fulfillment
- Intention to recommend (Net Promoter Score)
- Intention to repeat visit
- Overall value for money of the stay

Transportation
- Cost of transport to reach the destination
- Accessibility of public transport (bus, metro…)

- Hospitality of personnel in public transport
- Price of public transport
- Hospitality at entry point
- Taxi service
- Parking convenience
- Transportation infrastructure (roads…)
- Access to/from the airport
- Signposting & ease of finding your way around

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

Shopping
- Range of shopping possibilities
- Value for money
- Hospitality of personnel in shops
- Opening hours & days
- Quality of handicrafts

B. Top Line Results Visitor Satisfaction of the United States

Overseas Visitors to the United States. vs. Overseas Benchmark. Satisfaction of traveling in United States by Overseas visitors **USA (OVS Markets)** compared to other top global destinations visited by our major source markets **(Overseas Benchmark)** is measured through the ten experience categories (see Table 1).

In 2019, the United States had a competitive advantage in 7 of the 10 visitor experience categories: Shopping, Tourist information centers, Environment, Culture and leisure, Local hospitality & safety feeling, Beach & water, and Transportation.

The United States had a competitive disadvantage in 3 of the 10 categories: Historical heritage, Accommodation experience and Food experience.

Table 1: United States vs. Overseas Benchmark

Key Experience Categories	USA (OVS Markets)	Overseas Benchmark	Difference
Shopping	199	171	28
Tourist Information Centers	164	140	24
Environment	198	179	19
Culture & Leisure	192	174	18
Local Hospitality & Safety Feeling	196	180	17
Beach & Water	233	217	16
Transportation	158	148	10
Historical Heritage	193	206	-13
Accommodation Experience	190	206	-15
Food Experience	171	188	-17

Compared to the other major international long-haul destinations visited by the U.S.'s top overseas source markets, the United States had competitive advantage in nearly half (24) of the 49 components across all 10 visitor experience categories; was competitive in 16 components; and had a competitive disadvantage in 9 components.

The top 6 components where the United States was most competitive spanned 6 different Visitors Experience Categories: Amusement & theme parks (Culture & leisure), Ease of communication with local people (Local hospitality & safety feeling), Range of shopping possibilities (Shopping), Cleanliness & upkeep (Beach and water), Cleanliness outside cities (Environment), and Transportation infrastructure (Transportation).

The term "price", "entrance fee" or "value for money" was included in the description of 5 of the 9 components where the United States had a competitive disadvantage: **Price** of leisure activities (Culture & leisure), **Entrance fees** (Historical heritage), **Price** of public transport (Transportation), **Value for money** (Accommodation experience), and **Value for money** (Food experience).

Canadian/Mexican Visitors to the United States vs. CanMex Benchmark. Canadian/Mexican visitor's satisfaction of traveling in United States **USA (CanMex Markets)** compared to other top global destinations visited Canadian and Mexican visitors **(CanMex Benchmark)** is measured through the 10 experience categories (see Table 2).

The United States had a competitive advantage in 9 of the 10 categories: Beach & water, Shopping, Tourist information centers, Culture and leisure, Transportation, Accommodation experience, Environment, Food experience, and Local hospitality & safety feeling.

The United States was competitive in one category: Historical Heritage.

Table 2: United States vs. CanMex Benchmark

Key Experience Categories	USA (CanMex)	CanMex Benchmark	Difference
Beach & Water	324	239	85
Shopping	242	170	72
Tourist Information Centers	232	164	68
Culture & Leisure	255	207	48
Transportation	217	180	37
Accommodation Experience	246	212	34
Environment	254	229	25
Food Experience	222	206	17
Local Hospitality & Safety Feeling	232	219	13
Historical Heritage	260	267	-8

Compared to the other major international destinations visited by Canadian and Mexican travelers, the United States had competitive advantage in more than two-thirds (35) of the 49 components across all 10 visitor experience categories; was competitive in 9 components; and had a competitive disadvantage in 5 components.

The top 6 components where the United States was most competitive spanned 4 different Visitors Experience Categories: Cleanliness & upkeep (Beach and water), Parking convenience (Transportation), Water activities (Beach and water), Range of shopping possibilities (Shopping), Opening hours & days (Shopping), and Amusement & theme parks (Culture & leisure).

2 of the 5 components where the UNITED STATES had a disadvantage related to **hospitality of Americans,** while none referenced "price", "entrance fee" or "value for money", which is a difference from the experience of from overseas visitors: **Hospitality of personnel in public transport** (Transportation) and **Hospitality of local inhabitants** (Local hospitality & safety feeling).

Category 1. The Accommodation Experience of International Visitors in the United States

International Visitor Satisfaction – 2019 Baseline Results

Overseas Accommodation Experience
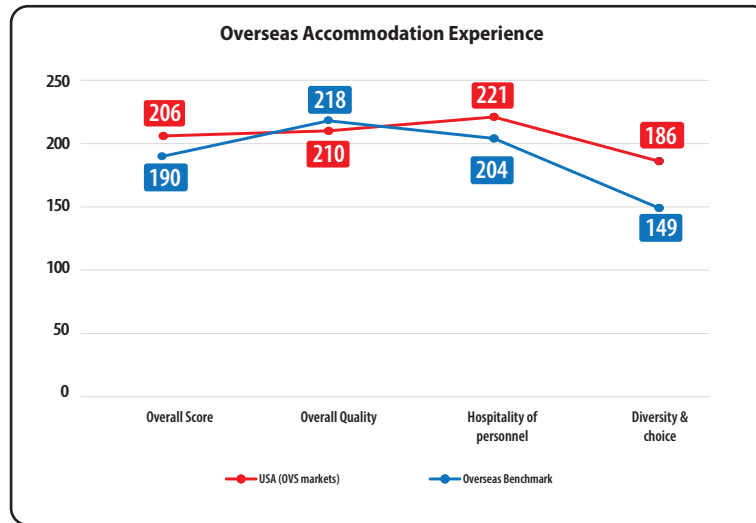
Accommodation Experience	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	190	206	**-15**
Overall quality	218	210	8
Hospitality of personnel	204	221	**-17**
Value for money	149	186	**-37**

Importance of the Accommodation Experience. In 2019, international visitors spent $40.2 billion on traveler accommodations in the United States, accounting for 18% of total (domestic and international) traveler spending on traveler accommodations in the United States and 21% of total international travel spending in the United States.[1]

- Of the 10 Categories in this study, the U.S. Accommodation Experience score of 190 by overseas visitors was the seventh-highest score, only higher than the Food Experience, Tourist information Centers, and Transportation.
- Within the Accommodation experience category, high U.S. scores for Overall quality (218) and Hospitality of personnel (204) offset a lower score for Value for money (149).

United States vs. Overseas Benchmark

- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score (-15 compared to Overseas Benchmark) for the overall Accommodation experience category as well as for 2 of the 3 Accommodation experience components vs. Overseas Benchmark: Hospitably of personnel (-17) and Value for money (-37).
- Competitive: The United States had a competitive score for Overall quality (+8 compared to Overseas Benchmark).

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[1] Bureau of Economic Analysis, Travel and Tourism Satellite Account

Category 2: The Food Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

Importance of the Food experience: In 2019, international visitors spent $25.5 billion on food services in the United States, accounting for 15% of total (domestic and international) traveler spending on traveler accommodations in the United States and 13% of total international travel spending in the United States[2].

Overseas Food Experience
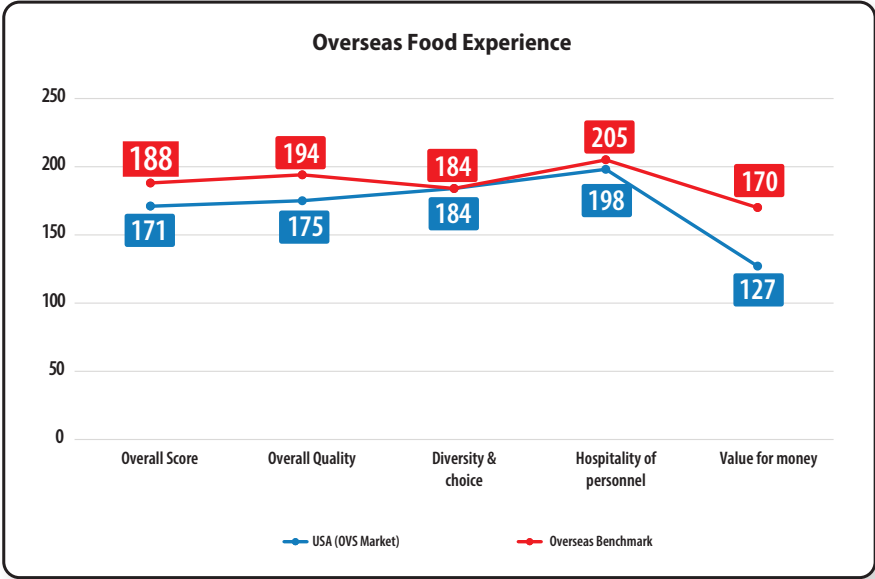
Food Experience	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	171	188	**-17**
Overall quality	175	194	**-19**
Diversity & choice	184	184	0
Hospitality of personnel	198	205	**-7**
Value for money	127	170	**-43**

- Of the 10 categories in this study, the U.S. Food experience score of 171 by overseas visitors was the eighth-highest score, only higher than Tourist information centers and Transportation.
- Within the Food experience category, high U.S. scores of Hospitality of personnel (198), Diversity & choice (184), and Overall quality (175) offset a lower score Value for money (127).

United States vs. Overseas Benchmark

- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score (-17) for the overall Food experience category as well as for 2 of the 4 Food experience components vs. Overseas Benchmark: Overall quality (-19) and Value for money (-43).
- Competitive: The United States had competitive scores for Hospitality of personnel (-7) and Diversity & choice (0).

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[2] Bureau of Economic Analysis, Travel and Tourism Satellite Account

Category 3. Transportation used by International Visitors

International Visitor Satisfaction – 2019 Baseline Results

Importance Transportation. In 2019, international visitors spent $42.5 billion on transportation on trips to and within the United States, accounting for 11% of total (domestic and international) traveler spending on transportation the United States and 22% of total international travel spending in the United Sates.[11]

Overseas Transportation
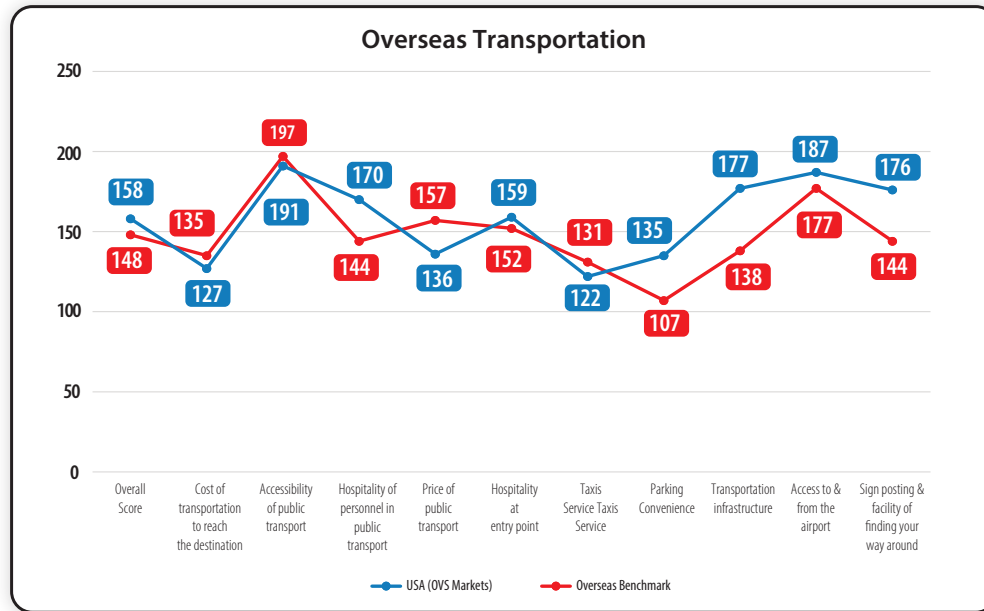
Transportation	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	158	148	10
Cost of transport to reach the destination	127	135	-8
Accessibility of public transport	191	197	-6
Hospitality of personnel in public transport	170	144	26
Price of public transport	136	157	-21
Hospitality at entry point	159	152	7
Taxi service	122	131	-9
Parking convenience	135	107	28
Transportation infrastructure	177	138	39
Access to & from the airport	187	177	10
Signposting & facility of finding your way around	176	144	32

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[11] Bureau of Economic Analysis, Travel and Tourism Satellite Account

- Of the 10 categories in this study, Transportation's score of 158 by overseas visitors was the lowest score.
- Within the Transportation category, high U.S. scores of Accessibility of public transportation (191), Access to & from the airport (187), Transportation infrastructure (177), Signposting & facility of finding your way around (176), Hospitality of personnel in public transportation (170), and Hospitality at entry point (159) offset lower scores of Price of public transportation (136), Parking convenience (135), Cost of transport to reach the destination (127), and Taxi service (122).

U.S. vs. Overseas Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+10) for the overall Transportation category as well as for 5 of the 10 Transportation components vs. Overseas Benchmark: Transportation infrastructure (+39), Signposting & facility of finding your way around (+32), Parking convenience (+28), Hospitality of personnel in public transportation (+26), and Access to & from the airport (10).
- Competitive: The United States had competitive scores for Hospitality at entry point (+7), Accessibility of public transportation (-6), Cost of transport to reach the destination (-8), and Taxi service (-9).
- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score for the Price of public transportation (-21).

Category 4. The Shopping Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

Importance of Shopping: In 2019, international visitors spent $44 billion shopping in the United States, accounting for 26% of total (domestic and international) traveler spending on shopping in the United States and 23% of total international travel spending in the United States.[12]

Overseas Shopping Experience

Legend: ●— USA (Overseas Markets)   ●— Overseas Benchmark

Shopping Experience	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	199	171	28
Range of shopping possibilities	243	193	50
Value for money	164	137	27
Hospitality of personnel	199	171	28
Opening hours & days	226	187	39
Quality of handicrafts & souvenirs	164	168	-4

[12] Bureau of Economic Analysis, Travel and Tourism Satellite Account

- Of the 10 Categories in this study, the U.S. Shopping experience score of 199 for overseas visitors was the second-highest score, only behind Beach and Water.
- Within the Shopping experience category, strong U.S. scores of Range of shopping possibilities (243) and Opening hours & days (226) offset lower scores for Value for money and Quality of handicrafts & souvenirs (both 164).
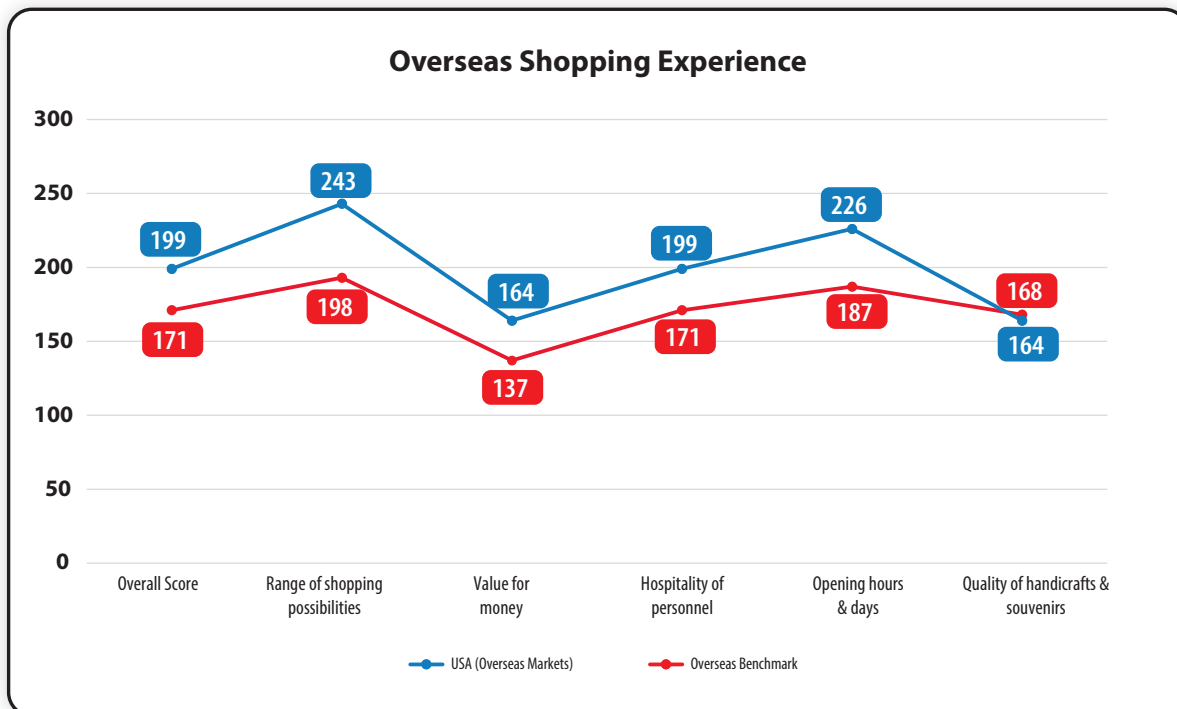
U.S. vs. Overseas Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+28) for the overall Shopping experience category (more than all other categories) as well as for 4 of the 5 Shopping experience components vs. Overseas Benchmark: Range of shopping possibilities (+50), Opening hours & days (+39), Hospitably of personnel (+28), and Value for money (+27).
- Competitive Disadvantage: The United States had a competitive score for Quality of handicrafts & souvenirs (-4).

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[13] Survey of International Air Travelers (SIAT)

Category 5. The Experience of International Visitors in the United States with the Environment
(International Visitor Satisfaction – 2019 Baseline Results)

Importance of the Environment: In 2019, 3.5 million overseas visitors went on an environmental excursion or camping/hiking in the United States, accounting for 8.6% of recorded leisure activities.[13]

Overseas The Environment
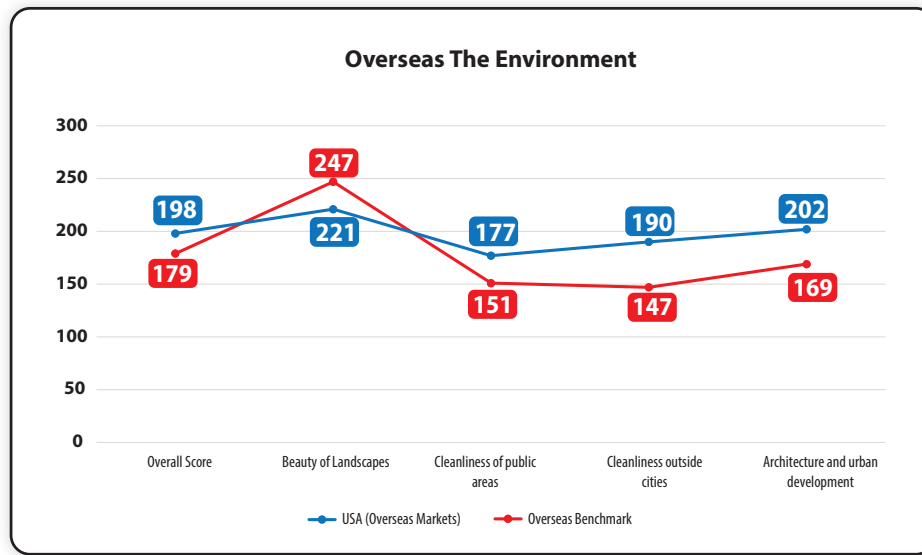
The Environment	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	198	179	19
Beauty of landscapes	221	247	-26
Cleanliness of public areas	177	151	26
Cleanliness outside cities	190	147	43
Architecture and urban development	202	169	33

- Of the 10 categories in this study, the Environment score of 198 for overseas visitors was the third-highest score, only behind Beach and water, and Shopping.
- Within the Environment, strong U.S. scores of Beauty of landscapes (221) and Architecture and urban development (202) offset lower scores for Cleanliness outside cities (190), Cleanliness of public areas (177).

United States vs. Overseas Benchmark
- Competitive Advantage: The United States had a statistically significant competitive advantage score (+19) for the overall Environment category as well as for 3 of the 4 Environment components vs. Overseas Benchmark: Cleanliness outside cities (+43), Architecture and urban development (+33), and Cleanliness of public areas (+26).
- Competitive Disadvantage: The United States had a competitive disadvantage score for Beauty of landscapes (-26).

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[14] Survey of International Air Travelers (SIAT)

Category 6. The Historical Heritage Experience of International Visitors in the United States
(International Visitor Satisfaction – 2019 Baseline Results)

Importance of Historical Heritage. In 2019, 21.5 million international visitors went to art galleries/museums or historical locations in the United States, accounting for 53.3% of recorded leisure activities.[14]

Overseas Historical Heritage
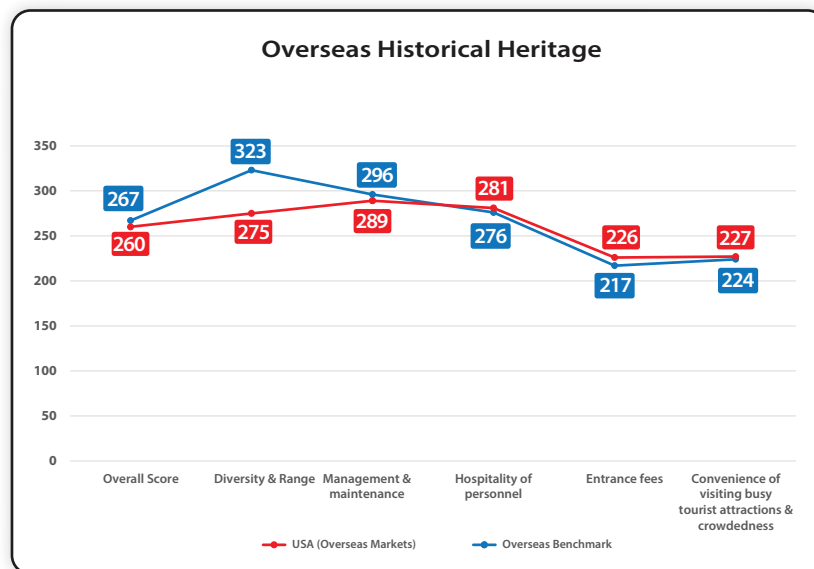
Historical Heritage	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	193	206	-13
Diversity & range	211	263	-52
Management & maintenance	221	226	-5
Hospitality of personnel	224	218	6
Entrance fees	139	156	-17
Convenience of visiting busy tourist attractions & crowdedness	169	166	3

- Of the 10 Categories in this study, the Historical heritage score of 193 by overseas visitors was the fifth-highest score.
- Within the Historical heritage category, high U.S. scores of Hospitality of personnel (224), Management & maintenance (221) and Diversity & range (211) offset lower scores for Convenience of visiting busy tourist attractions & crowdedness (169) and Entrance fees (139).

United States vs. Overseas Benchmark
- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score (-13) for the overall Historical heritage category as well as for 2 of the 5 Historical heritage components vs. Overseas Benchmark: Diversity and range (-52) and Entrance fees (-17).
- Competitive: The United States had competitive scores for Hospitality of personnel (+6), Convenience of visiting busy tourist attractions & crowdedness (+3), and Management & maintenance (-5).

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[15] Survey of International Air Travelers (SIAT)

Category 7. The Cultural and Leisure Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

Importance of Culture and Leisure. In 2019, 24 million overseas visitors went to amusement/theme parks, concert/play/musical, or guided tours in the United States, accounting for 59% of recorded leisure activities.[15]

Overseas Culture and Leisure

Culture & Leisure	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	192	174	18
Diversity & range	209	198	11
Theater, opera, cultural shows	183	156	27
Amusement & theme parks	296	235	61
Price of leisure activities	103	120	-17
Guided tours	183	177	6
Nightlife	179	159	20

- Of the 10 categories in this study, the Culture & leisure score of 192 by overseas visitors was the sixth-highest score.
- Within the Culture & leisure category, high U.S. scores of Amusement & theme parks (296) and Diversity & range (209) offset lower scores of Theater, opera, cultural shows (183), Guided tours (183), Nightlife (179), and Price of leisure activities (103).

United States vs. Overseas Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+18) for the overall Culture & leisure category as well as for 4 of the 6 components vs. Overseas Benchmark: Amusement and theme parks (+61), Theater, opera, cultural shows (+27), Nightlife (+20), and Diversity & range (+11).
- Competitive: The United States had competitive score for Guided tours (+6).
- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score for the Price of leisure activities (-17).

Category 8. Tourist Information Centers Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

Overseas Tourist Information Centers
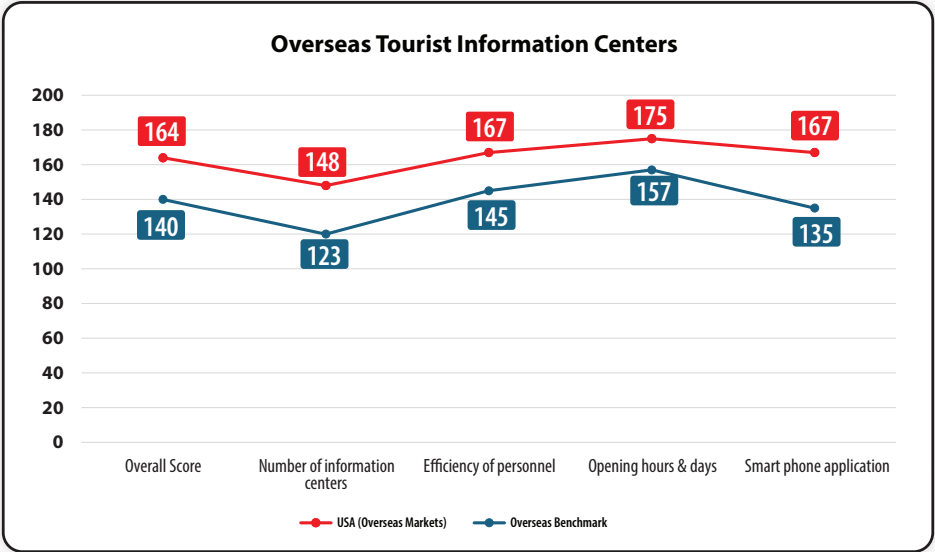
Tourist Information Centers	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	164	140	24
Number of information centers	148	123	25
Efficiency of personnel	167	145	22
Opening hours & days	175	157	18
Smartphone application	167	135	32

- Of the 10 categories in this study, the Tourist information centers score of 164 by overseas visitors was the ninth-highest score, only above Transportation.
- Within the Tourist information centers category, high U.S. scores of Opening hours & days (175), Smartphone application and Efficiency of personnel (both 167) offset a lower score of Number of information centers (148).

United States vs. Overseas Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+24) for the overall Tourist information centers category score as well as for all the Tourist information centers components vs. Overseas Benchmark: Smartphone application (+32), Number of information centers (-25) a Efficiency of personnel (+22), and Opening hours & days (+18)

Category 9. Beaches & Water Activities Experience of International Visitors in the United States

International Visitor Satisfaction – 2019 Baseline Results

Importance of Beaches & Water Activities. In 2019, 3.4 million international visitors engaged in water sports leisure activities in the United States.[16]

Overseas Beach and Water
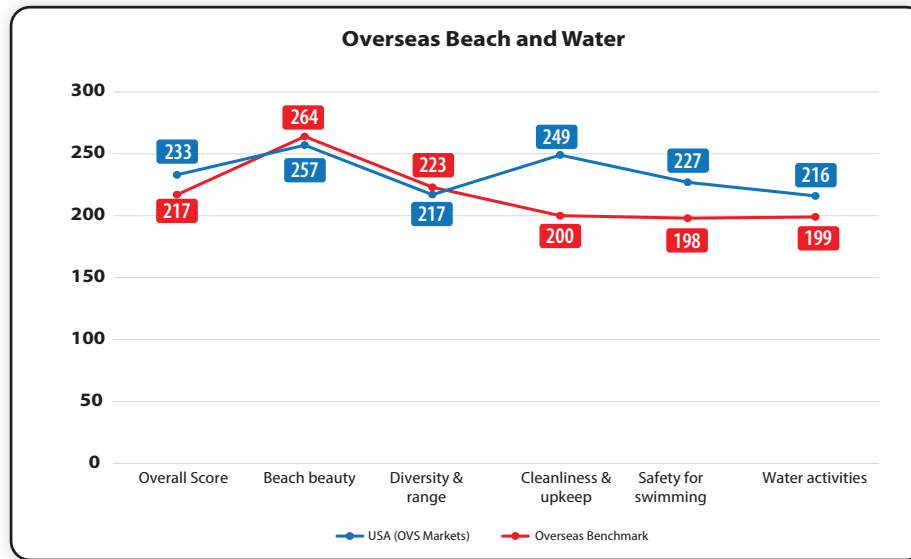
Beach & Water	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	233	217	16
Beach beauty	257	264	-7
Diversity & range	217	223	-6
Cleanliness & upkeep	249	200	49
Safety for swimming	227	198	29
Water activities	216	199	17

- Of the 10 Categories in this study, Beach & Water Activities score of 233 by overseas visitors was the highest score.
- The U.S. scored above 200 in all the Beach & Water Activities Categories: Beach beauty (257), Cleanliness & upkeep (249), Safety for swimming (227), Diversity & range (217), and Water activities (216).

United States vs. Overseas Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+16) for the overall Beach & water activities category as well as for 3 of the 5 Beach & water activities components vs. Overseas Benchmark: Cleanliness & upkeep (+49), Safety for swimming (+29), and Water activities (+17).
- Competitive: The United States had competitive scores for Diversity & range (-6), and Beach beauty (-7).

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[16] Survey of International Air Travelers (SIAT)

Category 10. Local People's Hospitality & Safety Feeling Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

Overseas Local Hospitality & Safety Feeling
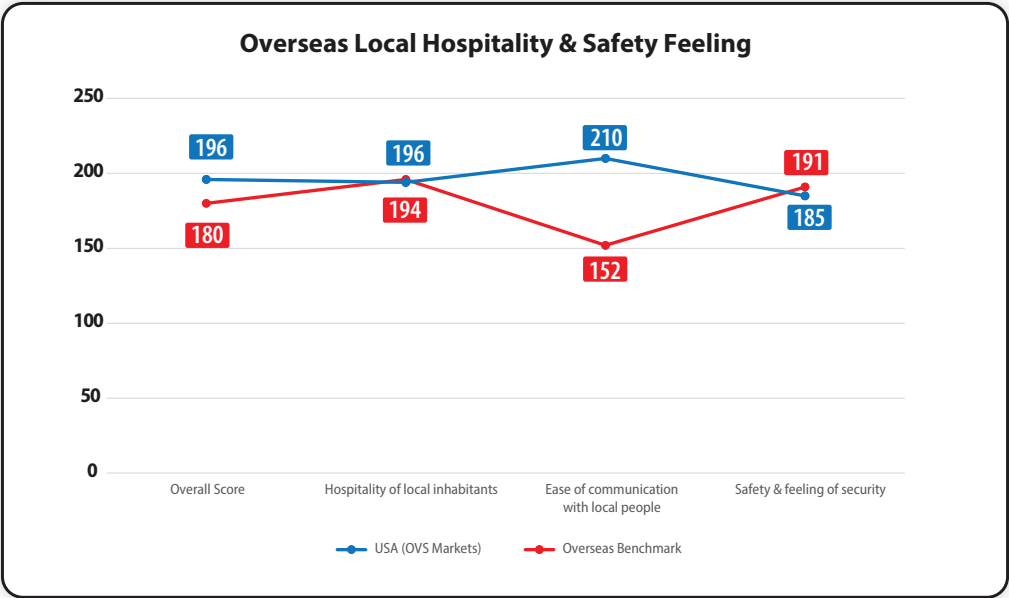
Local Hospitality & Safety Feeling	USA (OVS Markets)	Overseas Benchmark	Difference
Overall Score	196	180	**17**
Hospitality of local inhabitants	194	196	**-2**
Ease of communication with local people	210	152	**58**
Safety & feeling of security	185	191	**-6**

- Of the 10 Categories in this study, the Local Hospitality & Safety Feeling score of 196 by overseas visitors was the fourth-highest score.
- Within Local Hospitality & Safety Feeling category, a high U.S. score of Ease of communication with local people (210) offset lower scores of Hospitality of local inhabitants (194) and Safety & feeling of security (185).

United States vs. Overseas Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+17) for the overall Local hospitality & safety feeling Category as well as for 1 of the 3 Local hospitality & safety feeling components vs. Overseas Benchmark: Ease of communication with local people (+58).
- Competitive: The United States had competitive scores for Hospitality of local inhabitants (-2), and Safety & feeling of security (-6).

D. Detailed Results Canada/Mexico Visitor Satisfaction of the United States vs. CanMex Benchmark by Visitor Experience Category

Category 1: The Accommodation Experience of International Visitors in the United States
(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Accomodation Experience
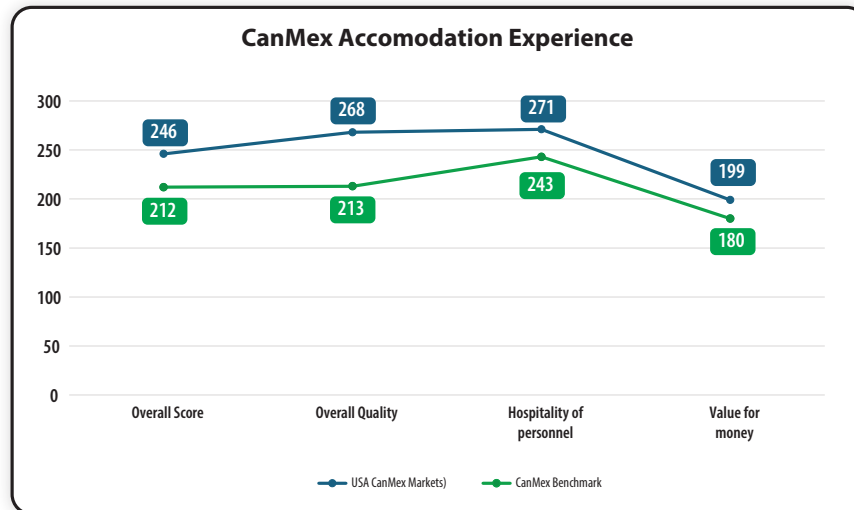
Accommodation Experience	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	246	212	**34**
Overall quality	268	213	**55**
Hospitality of personnel	271	243	**28**
Value for money	199	180	**19**

- Of the 10 categories in this study, the U.S. Accommodation experience score of 246 by Canada & Mexican visitors was the fifth-highest score.
- Within the Accommodation experience category, high U.S. scores for Hospitality of personnel (271) and Overall quality (268) offset a lower score for Value for money (199).

United States vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+34 compared to CanMex Benchmark) for the overall Accommodation experience category as well as for all 3 Accommodation experience components vs. CanMex Benchmark: Overall quality (+55), Hospitality of personnel (+28), and Value for money (+19).

Category 2: The Food Experience of International Visitors in the United States
(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Food Experience
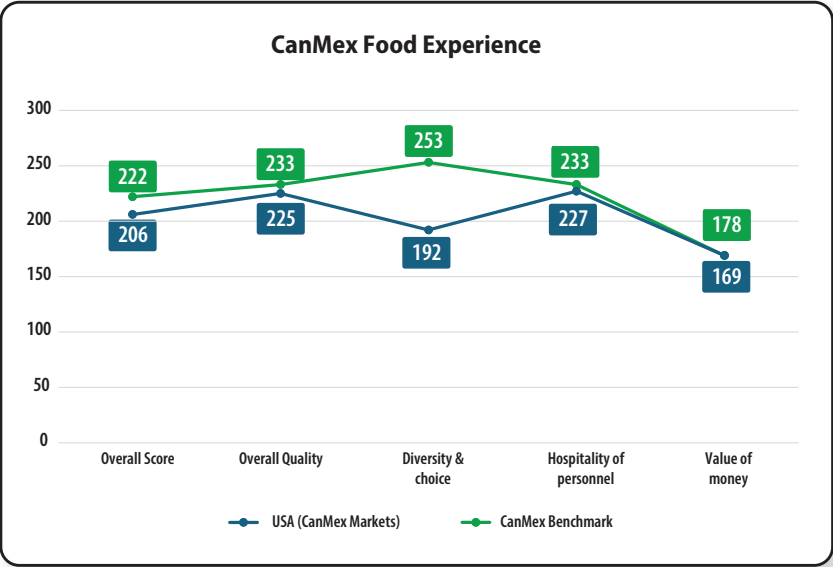
Food Experience	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	222	206	**17**
Overall quality	233	225	8
Diversity & choice	253	192	**61**
Hospitality of personnel	233	227	6
Value for money	169	178	**-9**

- Of the 10 categories in this study, the U.S. Food experience score of 222 by Canada & Mexican visitors was the nineth-highest score, only higher than Transportation.
- Within the Food experience category, high U.S. scores of Diversity & choice (253), Hospitality of personnel (233), and Overall quality (233) offset a lower score for Value for money (169).

United States. vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+17) for the overall Food experience category as well as in 1 of the 4 Food experience components vs. CanMex Benchmark: Diversity & choice (+61)
- Competitive: The United States had competitive scores for Overall quality (+8), Hospitality of personnel (-6), and Value for money (-9).

Category 3: Transportation Used by International Visitors

(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Transportation
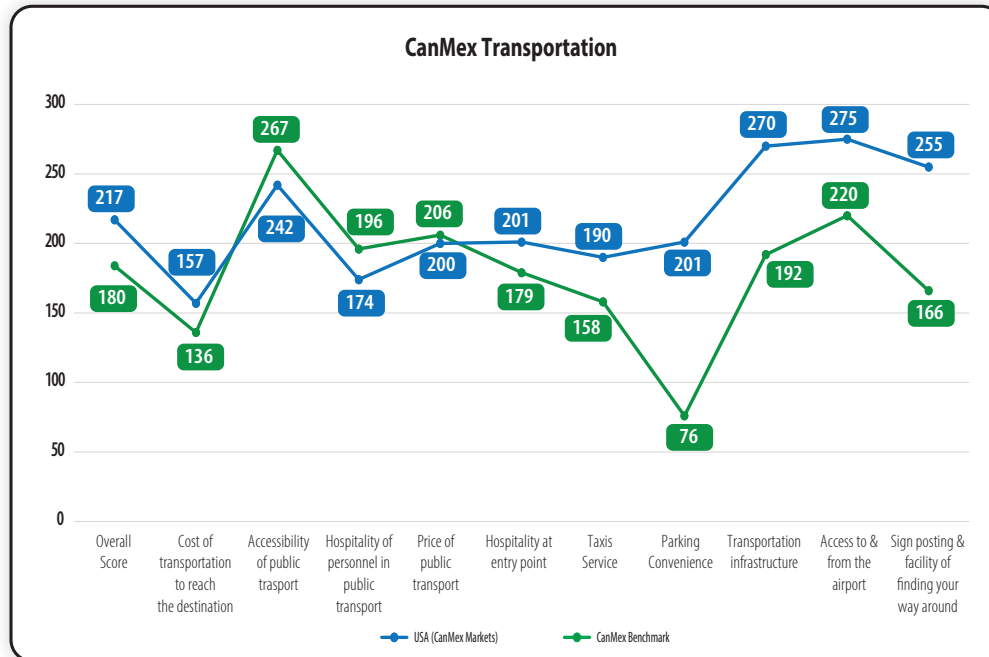
Transportation	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	217	180	37
Cost of transport to reach the destination	157	136	21
Accessibility of public transport	242	267	-25
Hospitality of personnel in public transport	174	196	-22
Price of public transport	200	206	-6
Hospitality at entry point	201	179	22
Taxi service	190	158	32
Parking convenience	201	76	125
Transportation infrastructure	270	192	78
Access to & from the airport	275	220	55
Signposting & facility of finding your way around	255	166	89

- Of the 10 categories in this study, Transportation's score of 217 by Canada & Mexican visitors was the lowest score.
- Within the Transportation category, high scores of Access to & from the airport (275), Transportation infrastructure (270), Signposting & facility of finding your way around (255), and Accessibility of public transportation (242) offset lower scores of Parking convenience (201), Hospitality at entry point (201), Price of public transportation (200), Taxi service (190), Hospitality of personnel in public transportation (174), and Cost of transportation to reach the destination (157).

United States. vs. CanMex Benchmark

- **Competitive Advantage:** : The United States had a statistically significant competitive advantage score (+37) for the overall Transportation category as well as for 7 of the 10 Transportation components vs. CanMex Benchmark: Parking convenience (+125), Signposting & facility of finding your way around (+89), Transportation infrastructure (+78), Access to & from the airport (+55), Taxi service (+32), Hospitality at entry point (+22), and Cost of transportation to reach the destination (+21).
- **Competitive:** The United States had a competitive score for Price of public transportation (-6).
- **Competitive Disadvantage:** The United States had a statistically significant competitive disadvantage score for the Hospitality of personnel in public transportation (-22) and Accessibility of public transportation (-25).

Category 4: The Shopping Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Shopping Experience
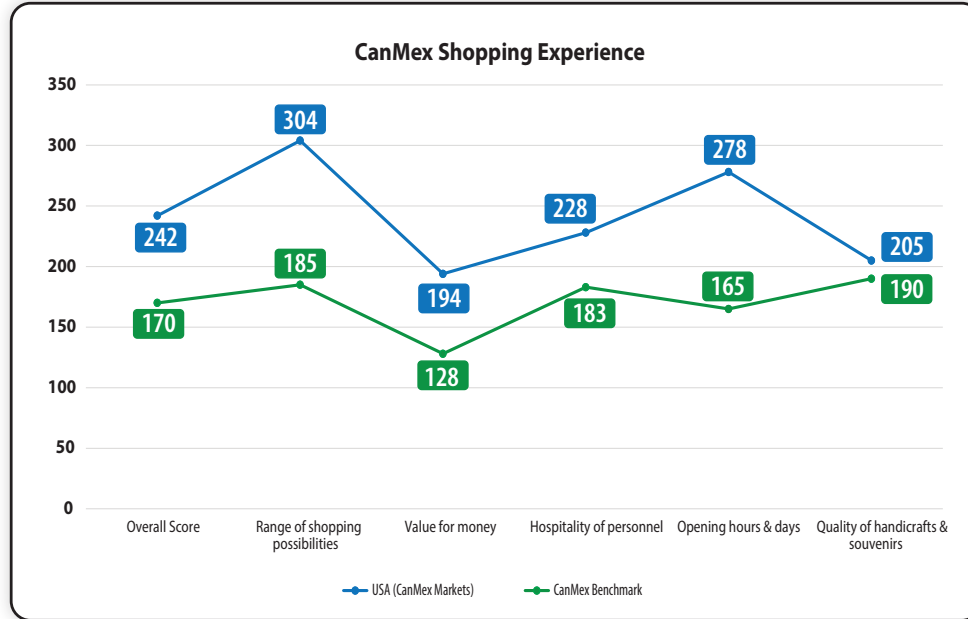
Shopping Experience	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	242	170	72
Range of shopping possibilities	304	185	119
Value for money	194	128	66
Hospitality of personnel	228	183	45
Opening hours & days	278	165	113
Quality of handicrafts & souvenirs	205	190	15

- Of the10 categories in this study, the U.S. Shopping experience score of 242 for Canada & Mexican visitors was the sixth-highest score.
- Within the Shopping experience category, strong U.S. scores of Range of shopping possibilities (304) and Opening hours & days (278) offset lower scores for Hospitality of personnel (228), Quality of handicrafts & souvenirs (205), and Value for money (194).

United States. vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant comparative advantage score (+72) for the overall Shopping experience category as well as for all 5 Shopping experience components vs. CanMex Benchmark: Range of shopping possibilities (+119), Opening hours & days (+113), Value for money (+66), Hospitably of personnel (+45), and Quality of handicrafts & souvenirs (+15).

Category 5: The Experience of International Visitors in the United States with the Environment

(International Visitor Satisfaction – 2019 Baseline Results)

CanMex The Environment
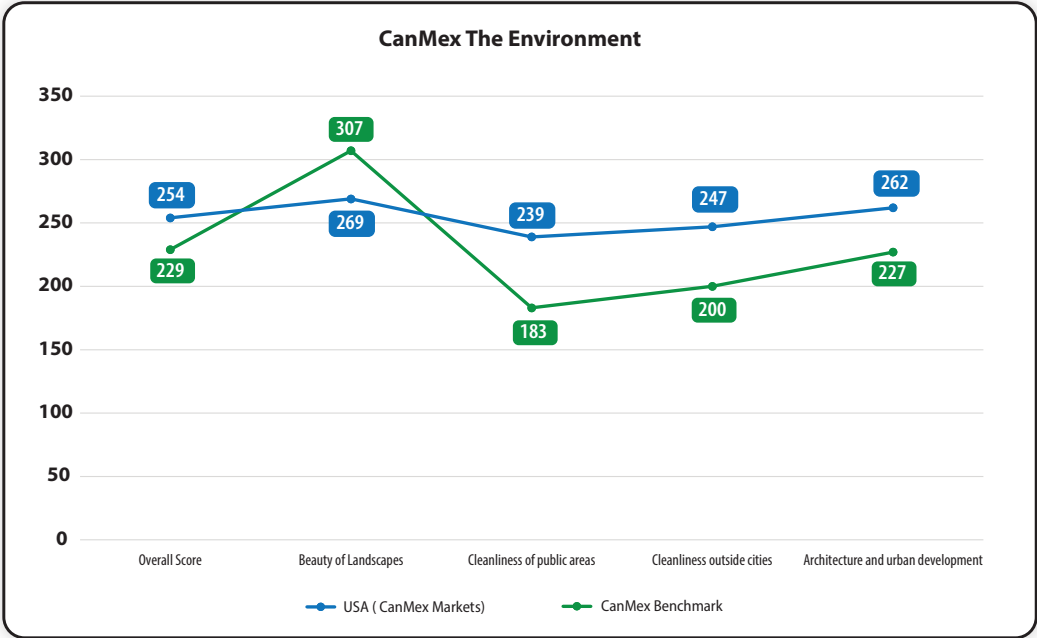
Environment	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	254	229	25
Beauty of landscapes	269	307	-38
Cleanliness of public areas	239	183	56
Cleanliness outside cities	247	200	47
Architecture and urban development	262	227	35

- Of the 10 categories in this study, the Environment score of 254 for Canada & Mexican visitors was the fourth-highest score.
- Within the Environment category, strong U.S. scores of Beauty of landscapes (269) and Architecture and urban development (262) offset lower scores for Cleanliness outside cities (247) and Cleanliness of public areas (239).

United States. vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant comparative advantage score (+25) for the overall Environment category as well as for 3 of the 4 Environment components vs. CanMex Benchmark: Cleanliness of public areas (+56), Cleanliness outside cities (+47), and Architecture and urban development (+35).
- Competitive Disadvantage: The United States had a competitive disadvantage score for Beauty of landscapes (-38).

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Category 6: The Historical Heritage Experience of International Visitors in the United States
(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Historical Heritage
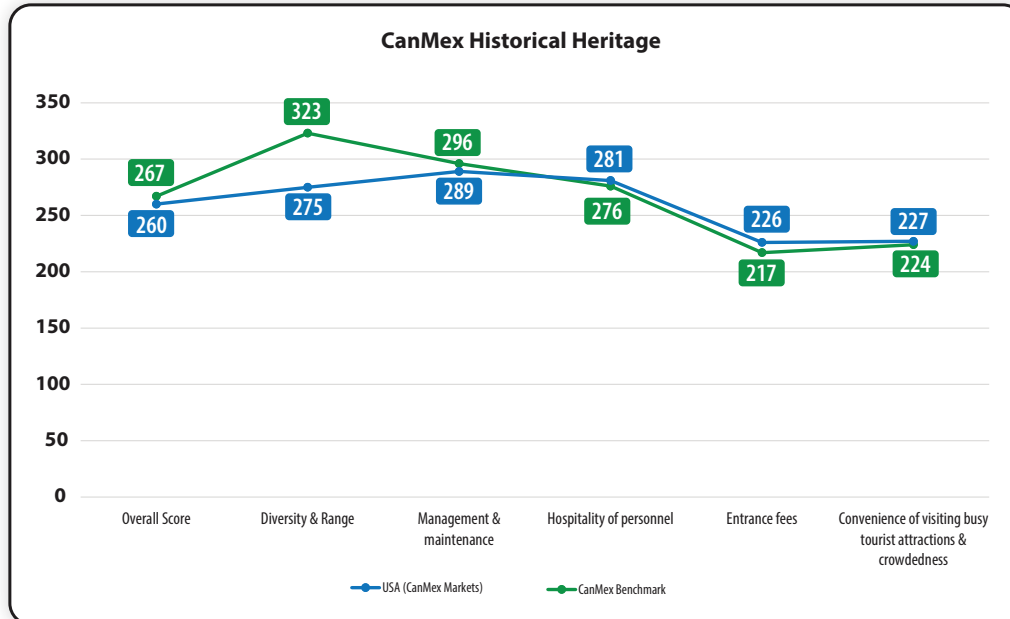
Historical Heritage	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	260	267	**-8**
Diversity & range	275	323	**-48**
Management & maintenance	289	296	**-7**
Hospitality of personnel	281	276	5
Entrance fees	226	217	9
Convenience of visiting busy tourist attractions & crowdedness	227	224	3

- Of the10 categories in this study, the U.S. Historical heritage score of 260 by Canada & Mexican visitors was the second-highest score, only behind Beach and Water.
- Within the Historical heritage category, high U.S. scores of Management and maintenance (289), Hospitality of personnel (281), and Diversity and range (275) offset lower scores for Convenience of visiting busy tourist attractions & crowdedness (227) and Entrance fees (226).

United States. vs. CanMex Benchmark
- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score (-48) for Diversity and range.
- Competitive: The United States had a competitive score (-8) for the overall Historical heritage category, and for 4 of the 5 components: Entrance fees (+9), Hospitality of personnel (+5), Convenience of visiting busy tourist attractions & crowdedness (+3), and Maintenance and management (-7).

Category 7: The Cultural and Leisure Experience of International Visitors in the United States
(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Culture and Leisure

Culture & Leisure	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	192	174	18
Diversity & range	209	198	11
Theater, opera, cultural shows	183	156	27
Amusement & theme parks	296	235	61
Price of leisure activities	103	120	-17
Guided tours	183	177	6
Nightlife	179	159	20

- Of the 10 categories in this study, the Culture & leisure score of 255 by Canada & Mexican visitors was the third-highest score, only behind Beach and water and Historical heritage.
- Within the Culture & leisure category, high U.S. scores of Amusement & theme parks (359), Nightlife (276), and Diversity & range (273) offset lower scores of Theater, opera, cultural shows (243), Guided tours (242), and Price of leisure activities (134).

United States. vs. CanMex Benchmark
- Competitive Advantage: The United States had a statistically significant competitive advantage score (+48) for the overall Culture & leisure category as well as in 5 of the 6 Culture & leisure components vs. CanMex Benchmark: Amusement & theme parks (+102), Nightlife (+73), Theater, opera, cultural shows (+58), Diversity & range (+31), and Guided tours (+16).
- Competitive: The United States had competitive score for Price of leisure activities (+6)

Category 8: Tourist Information Centers Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Tourist Information Centers

Legend: USA (CanMex Markets), CanMex Benchmark
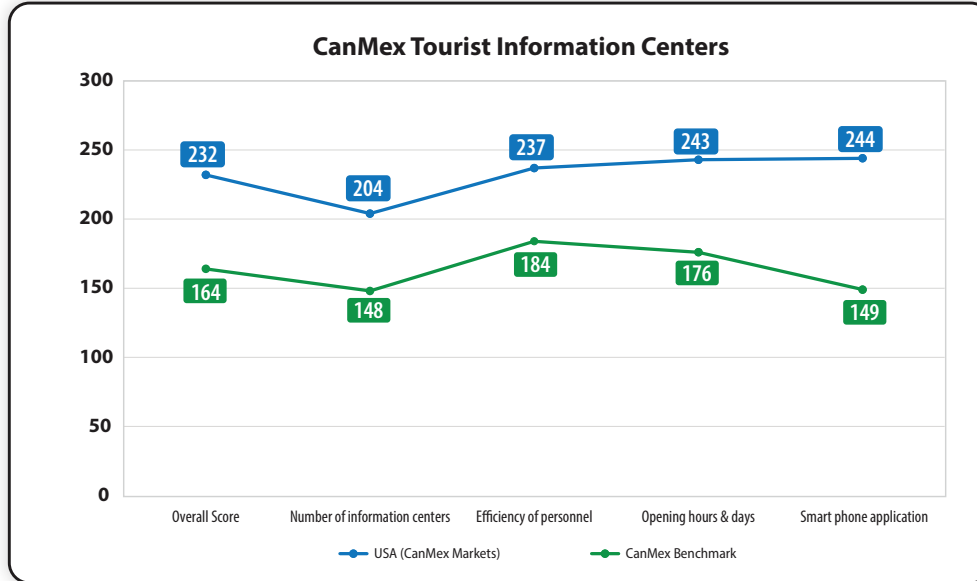
Tourist Information Centers	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	232	164	68
Number of information centers	204	148	56
Efficiency of personnel	237	184	53
Opening hours & days	243	176	67
Smartphone application	244	149	95

- Of the 10 categories in this study, the Tourist information centers score of 232 by Canada & Mexican visitors was tied at 7.
- The U.S. scored above 200 in all the Tourist information centers categories: Smartphone application (244), Opening hours & days (243), Efficiency of personnel (237), and Number of information centers (204).

United States. vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+68) for the overall Tourist information centers category as well as for all of the Tourist information centers components vs. CanMex Benchmark: Smartphone application (+95), Opening hours & days (+67), Number of information center (+56), Efficiency of personnel (+53).

Category 9: Beaches & Water Activities Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Beach and Water
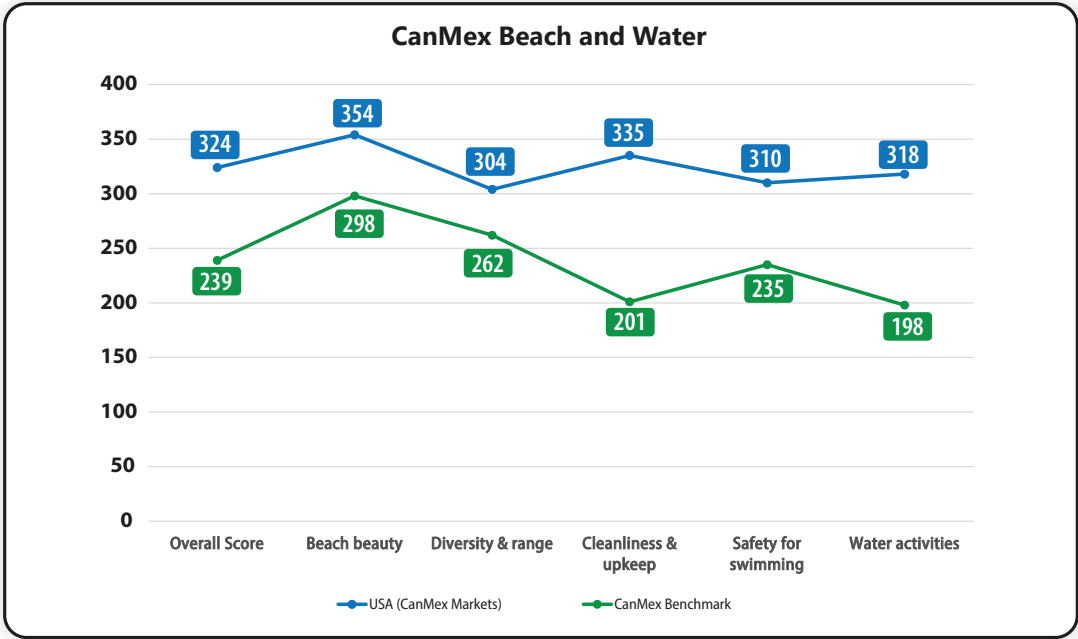
Beach & Water	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	324	239	85
Beach beauty	354	298	56
Diversity & range	304	262	42
Cleanliness & upkeep	335	201	134
Safety for swimming	310	235	75
Water activities	318	198	120

- Of the 10 categories in this study, the Beach & water activities score of 324 by Canada & Mexican visitors was the highest score.
- The U.S. scored above 300 in all the Beach & water activities categories: Beach beauty (354), Cleanliness & upkeep (335), Water activities (318), Safety for swimming (310), and Diversity & range (304).
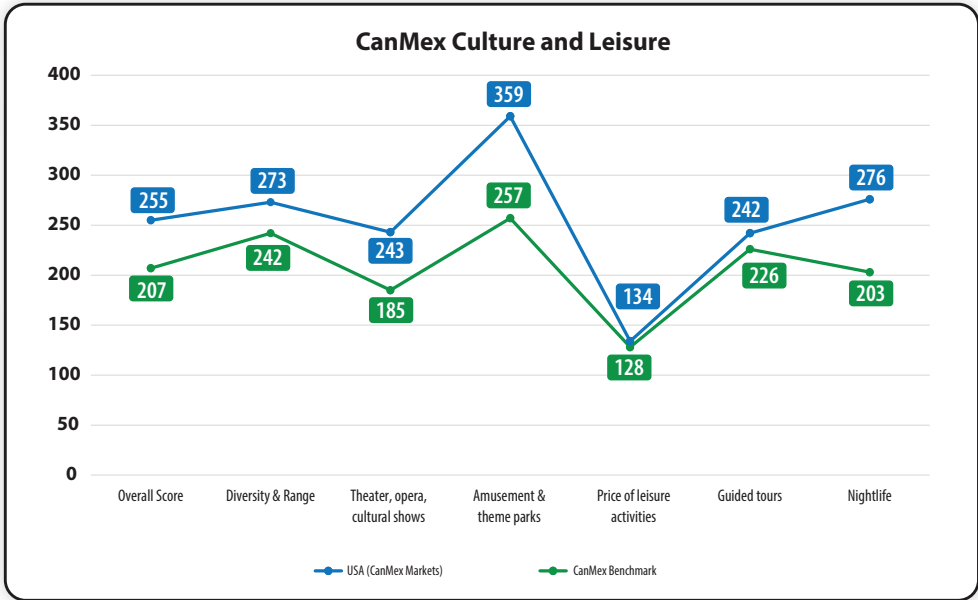
United States. vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+85) for overall the Beach & water category as well as in all the Beach & water activities components vs. CanMex Benchmark: Cleanliness & upkeep (+134), Water activities (+120), Safety for swimming (+75), Beach beauty (+56), Diversity & range (+42).

Category 10: Local People's Hospitality & Safety Feeling Experience of International Visitors in the United States

(International Visitor Satisfaction – 2019 Baseline Results)

CanMex Local Hospitality & Safety Feeling

	USA (CanMex Markets)	CanMex Benchmark
Overall Score	232	219
Hospitality of local inhabitants	211	246
Ease of communication with local people	247	189
Safety & feeling of security	238	221

— USA (CanMex Markets)   — CanMex Benchmark
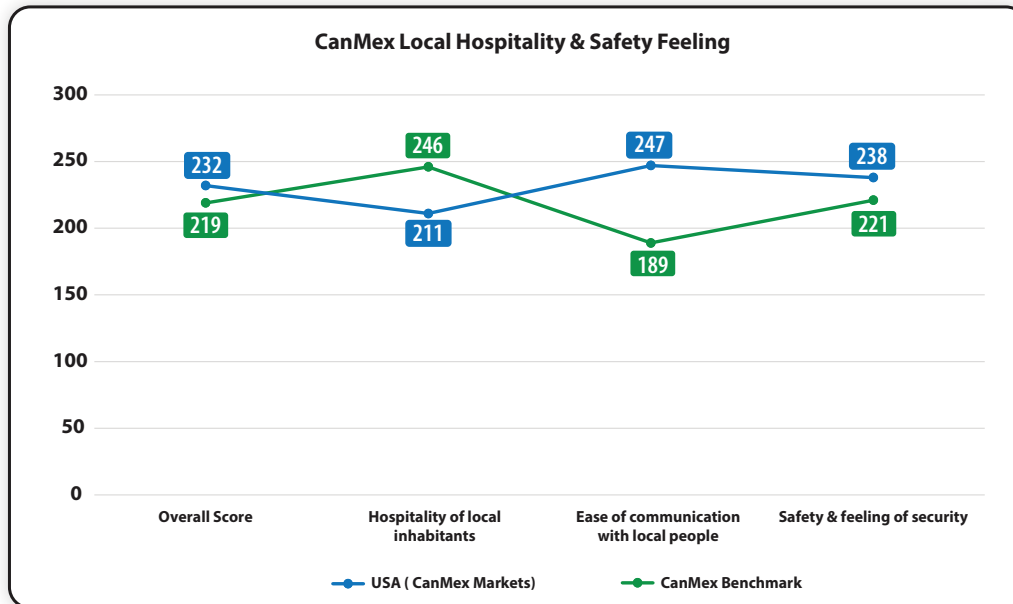
Local Hospitality & Safety Feeling	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall Score	232	219	**13**
Hospitality of local inhabitants	211	246	**-35**
Ease of communication with local people	247	189	**58**
Safety & feeling of security	238	221	**17**

- Of the 10 categories in this study, the Local hospitality & safety feeling score of 232 by Canada & Mexican visitors was the seventh-highest score.
- The U.S.scored above 200 in all components of the Local Hospitality & safety feeling Category: Ease of communication with local people (247), Safety & feeling of security (238), and Hospitality of local inhabitants (211).

### United States. vs. CanMex Benchmark

- Competitive Advantage: The United States had a statistically significant competitive advantage score (+13) for overall the Local hospitality & safety feeling category as well as in 2 of the 3 Local Hospitality & safety feeling components vs. CanMex Benchmark: Ease of communication (+58), and Safety & feeling of security (+17).
- Competitive Disadvantage: The United States had a statistically significant competitive disadvantage score for Hospitality of local inhabitants (-35).

E. Key Performance Indicators (KPIs)
(International Visitor Satisfaction – 2019 Baseline Results)

Overseas Key Performance Indicators (KPIs)
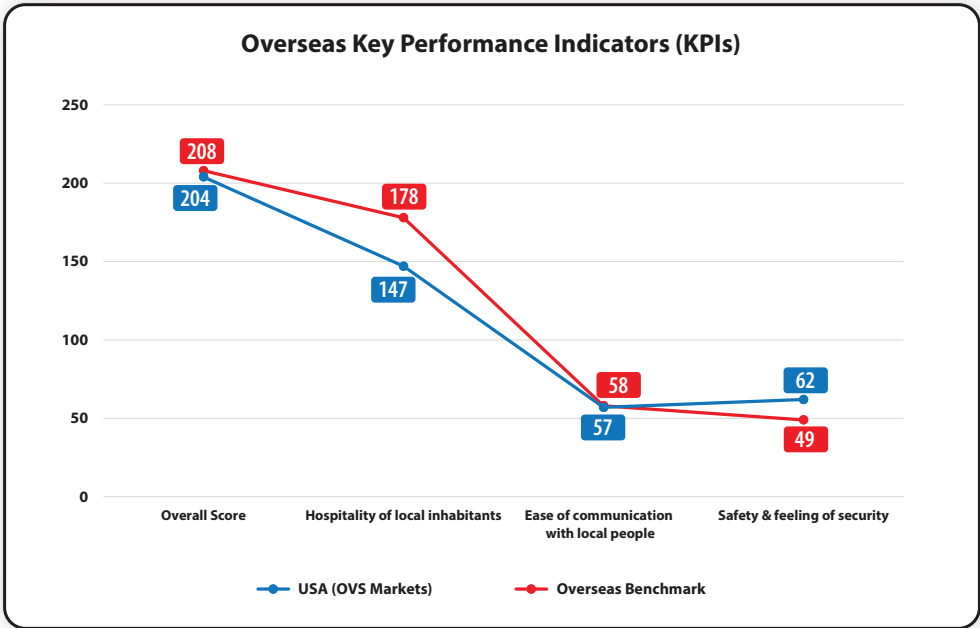
Key Performance Indicators (KPIs)	USA (OVS Markets)	Oversea Benchmark	Difference
Overall expectations fulfilment	204	208	-4
Overall value for money of the stay	147	178	**-31**
Net Promoter Score (NPS)	57	58	-1
Intention to repeat visit	62	49	**13**

United States vs. Overseas Benchmark
- The United States had a competitive advantage in 1 of the 4 KPIs compared to the Overseas Benchmark: Intention to repeat visit (+13).
- The United States was competitive in 2 KPIs, overall expectations fulfillment (-4) and net promoter score (NPS) (-1), which measures the propensity for visitors to recommend the United States as an international destination.
- The United States had a competitive disadvantage in 1 KPI, overall value for the money of the stay (-31).

CanMex Key Performance Indicators (KPIs)
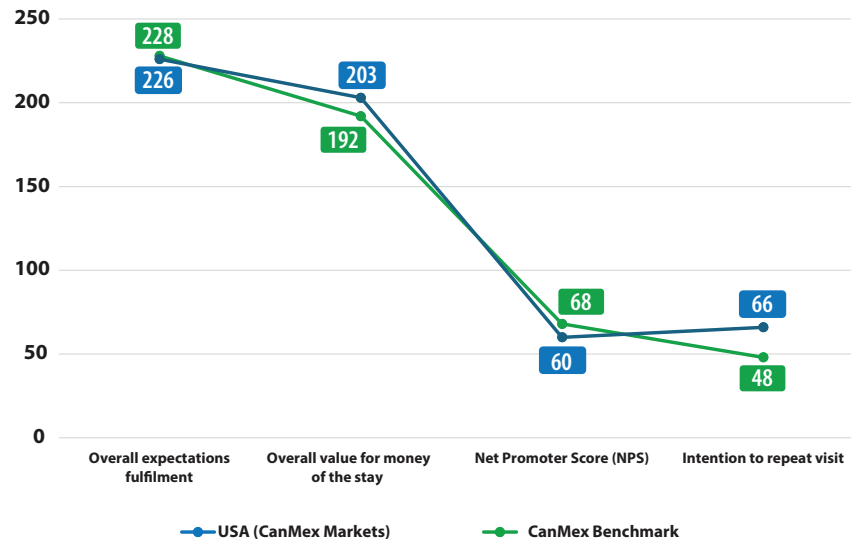
Key Performance Indicators (KPIs)	USA (CanMex Markets)	CanMex Benchmark	Difference
Overall expectations fulfilment	226	228	-2
Overall value for money of the stay	203	192	**11**
Net Promoter Score (NPS)	60	68	-8
Intention to repeat visit	66	48	**18**

United States vs. CanMex Benchmark

- The United States has a competitive advantage in 2 of the 4 KPIs compared to the CanMex Benchmark: Intention to repeat visit (+18) and overall value for the money of the stay (+11).
- The United States was competitive in 2 KPIs: Overall expectations fulfilment (-2) and Net promotor score (NPS) (-8), which measures the propensity for visitors to recommend the U.S. as an international destination.

F. Detailed Results of Overseas Visitor Satisfaction of the United States vs. Overseas Benchmark Across all Visitor Experience Categories

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

- Had competitive advantage in nearly half (24) of the 49 components across all 10 visitor experience categories
- Was competitive in 16 components
- Had a competitive disadvantage in 9 components

Competitive Advantage. The 24 components where the United States had a competitive advantage spanned 7 of the 10 visitor experience categories:

- Transportation (5 components)
- Shopping (4), Tourist information centers (4), Culture and leisure (4)
- Beach and water (3) Environment (3)
- Local hospitality & safety feeling (1)

  The United States did not have a competitive advantage in any component within the following categories: Historical heritage, Accommodation experience and Food experience.

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

- +61 points: Amusement & theme parks (Culture & Leisure)
- +58 points: Ease of communication with local people (Local Hospitality & Safety Feeling)
- +50 points: Range of shopping possibilities (Shopping)
- +49 points: Cleanliness & upkeep (Beach and Water)
- +43 points: Cleanliness outside cities (Environment)
- +39 points: shared between Transportation infrastructure (Transportation) and Opening hours & days (Shopping)

Competitive. The 16 components where the United States was competitive spanned 8 of the 10 visitor experience categories:

- Transportation (4 components)
- Historical Heritage (3)
- Local Hospitality & Safety Feeling (2), Beach and Water (2), Food Experience (2)
- Shopping (1), Culture and Leisure (1), Accommodation Experience (1)

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

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

- +8 points: Overall quality (Accommodation Experience)
- +7 points: Hospitality at entry point (Transportation)
- +6 points: Guided tours (Culture & Leisure)
- +6 points: Hospitality of personnel (Historical Heritage)

The four components where the United States was competitive and closest to having a competitive disadvantage were:
- -7 points: Hospitality of personnel (Food Experience)
- -7 points: Beach beauty (Beach and Water)
- -8 points: Cost of transport to reach the destination (Transportation)
- -9 points: Taxi service (Transportation)

Competitive Disadvantage. The 9 components where the United States had a competitive disadvantage spanned 6 of the 10 visitor experience categories:
- Food Experience (2 components), Accommodation Experience (2), Historical Heritage (2)
- Culture and Leisure (1), Environment (1) and Transportation (1).

The United States did not have a competitive disadvantage in any component within the following categories: Shopping, Tourist information centers, Local hospitality & Safety feeling, and Beach and water.

The term "price", "entrance fee" or "value for money" was included in the description of 5 of the 9 components where the United States had a competitive disadvantage:
- -17 points: **Price** of leisure activities (Culture & Leisure)
- -17 points: **Entrance fees** (Historical Heritage)
- -21points: **Price** of public transport (Transportation)
- -37 points: **Value for money** (Accommodation Experience)
- -43 points: **Value for money** (Food Experience)

Outside of components not related to cost or the value of money, the other 4 components where the United States had a competitive disadvantage were:
- -17 points: Hospitality of personnel (Accommodation Experience)
- -19 points: Overall quality (Food Experience)
- -26 points: Beauty of landscapes (Environment)
- -52 points: Diversity & range (Historical Heritage)

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

Table 3: U.S. vs. Overseas Benchmark
U.S. Has A Competitive Advantage
(+10 Points or More Compared to Overseas Benchmark)

	Component and (Category)	U.S. Score	Overseas Benchmark Score	Difference Between U.S. and Overseas Benchmark
1	Amusement & theme parks (Culture & Leisure)	296	235	61
2	Ease of communication with local people (Local Hospitality & Safety Feeling)	210	152	58
3	Range of shopping possibilities (Shopping)	243	193	50
4	Cleanliness & upkeep (Beach and Water)	249	200	49
5	Cleanliness outside cities (Environment)	190	147	43
6	Transportation infrastructure (Transportation)	177	138	39
7	Opening hours & days (Shopping)	226	187	39
8	Architecture and urban development (Environment)	202	169	33
9	Signposting & facility of finding your way aroung (Transportation)	176	144	32
10	Smartphone application (Tourist Information Center)	167	135	32
11	Safety for swimming (Beach and Water)	227	198	29
12	Parking convenience (Transportation)	135	107	28
13	Hospitality of personnel (Shopping)	199	171	28
14	Theater, opera, cultural shows (Culture & Leisure)	183	156	27
15	Value for money (Shopping)	164	137	27
16	Hospitality of personnel in public transport (Transportation)	170	144	26
17	Cleanliness of public areas (Environment)	177	151	26
18	Number of information centers (Tourist Information Centers)	148	123	25
19	Efficiency of personnel (Tourist Information Centers)	167	145	22
20	Nightlife (Culture & Leisure)	179	159	20
21	Opening hours & days (Tourist Information Centers)	175	157	18
22	Water activities (Beach and Water)	216	199	17
23	Diversity & range (Culture & Leisure)	209	198	11
24	Access to & from the airport (Transportation)	187	177	10

Table 3 (Contiued): U.S. vs. Overseas Benchmark
U.S. Is Competitive (within 10 Points of Overseas Benchmark)

	Component and (Category)	U.S. Score	Overseas Benchmark Score	Difference Between U.S. and Overseas Benchmark
1	Overall quality (Accommodation Experience)	218	210	8
2	Hospitality at entry point (Transportation)	159	152	7
3	Guided tours (Culture & Leisure)	183	177	6
4	Hospitality of personnel (Historical Heritage)	224	218	6
5	Convenience of visiting busy tourist attractions & crowdedness (Historical Heritage)	169	166	3
6	Diversity & choice (Food Experience)	184	184	0
7	Hospitality of local inhabitants (Local Hospitality & Safety Feeling)	194	196	-2
8	Quality of handicrafts & Souvenirs (Shopping)	164	168	-4
9	Management & maintenance (Historical Heritage)	221	226	-5
10	Accessibility of public transportation (Transportation)	191	197	-6
11	Diversity & range (Beach and Water)	217	223	-6
12	Safety and feeling of security (Local Hospitality & Safety Feeling)	185	191	-6
13	Hospitality of personnel (Food Experience)	198	205	-7
14	Beach beauty (Beach and Water)	257	264	-7
15	Cost of transportation to reach the destination (Transportation)	127	135	-8
16	Taxi service (Transportation)	122	131	-9

U.S. Has A Competitive Disadvantage
(-10 Points or Less Compared to Overseas Benchmark)

	Component and (Category)	U.S. Score	Overseas Benchmark Score	Difference Between U.S. and Overseas Benchmark
1	Hospitality of personnel (Accommodation Experience)	204	221	**-17**
2	Price of leisure activities (Culture & Leisure)	103	120	**-17**
3	Entrance fees (Historical Heritage)	139	156	**-17**
4	Overall quality (Food Experience)	175	194	**-19**
5	Price of public transportation (Transportation)	136	157	**-21**
6	Beauty of landscapes (Environment)	221	247	**-26**
7	Value for money (Accommodation Experience)	149	186	**-37**
8	Value for money (Food Experience)	127	170	**-43**
9	Diversity & range (Historical Heritage)	211	263	**-52**

G. Detailed Results of Canada/Mexico Visitor Satisfaction of the United States vs. CanMex Benchmark Across all Visitor Experience Categories

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

- Had competitive advantage in more than two-thirds (35) of the 49 components across all 10 visitor experience categories.
- Was competitive in 9 components
- Had a competitive disadvantage in 5 components.

Competitive Advantage. The 35 components where the United States had a competitive advantage spanned 9 of the 10 visitor experience categories:

- Transportation (7 components)
- Shopping (5), Culture and Leisure (5), and Beach and Water (5)
- Tourist Information Centers (4), Environment (3), and Accommodation Experience (3)
- Local Hospitality & Safety Feeling (2), Food Experience (1)

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

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

- +134 points: Cleanliness & upkeep (Beach and Water)
- +125 points: Parking convenience (Transportation)
- +120 points: Water activities (Beach and Water)
- +119 points: Range of shopping possibilities (Shopping)
- +113 points: Opening hours & days (Shopping)
- +102 points: Amusement & theme parks (Culture & Leisure)

Competitive. The 9 components where the United States was competitive spanned 4 of the 10 visitor experience categories:

- Historical Heritage (4 components)
- Food Experience (3)
- Culture and Leisure (1), Transportation (1)

   The United States did not have a competitive score in any component within the following categories: Shopping, Environment, Local hospitality & Safety feeling, Beach and water, Transportation, and Accommodation experience.

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

- +9 points: Entrance fees (Historical Heritage)
- +8 points: Overall quality (Food Experience)
- +6 points: Price of leisure activities (Culture & Leisure)
- +6 points: Hospitality of personnel (Food Experience)

The 3 components where the United States was competitive and closest to having a competitive disadvantage were:
- -6 points: Price of public transport (Transportation)
- -7 points: Management & maintenance (Historical Heritage)
- -9 points: Value for money (Food Experience)

Competitive Disadvantage. The 5 components where the United States had a competitive disadvantage spanned 4 of the 10 visitor experience categories:
- Transportation (2 components),
- Environment (1), Local Hospitality & Safety Feeling (1), Historical Heritage (1)

The United States did not have a competitive disadvantage in any component within the following categories: Shopping, Tourist information centers, Culture and leisure, Beach and water, Accommodation experience, and Food experience.
2 of the 5 components where the U.S. had a disadvantage related to hospitality of Americans. None referenced "price", "entrance fee" or "value for money", which is a difference from the experience of overseas visitors detailed in section F.
- -22 points: Hospitality of personnel in public transport (Transportation)
- -25 points: Accessibility of public transport (Transportation)
- -35 points: Hospitality of local inhabitants (Local Hospitality & Safety Feeling)
- -38 points: Beauty of landscapes (Environment)
- -48 points: Diversity & range (Historical Heritage)

Table 4 lists the scores between United States and CanMex Benchmark into the following groupings for all components across all visitor experience categories: competitive advantage, competitive, and competitive disadvantage.

Table 4: U.S. vs CanMex Benchmark
U.S. Has A Competitive Advantage
(+10 Points or More Compared to CanMex Benchmark)

	Component and (Category)	U.S. Score	CanMex Benchmark Score	Difference Between U.S. and CanMex Benchmark
1	Cleanliness & upkeep (Beach and Water)	335	201	134
2	Parking convenience (Transportation)	201	76	125
3	Water activities (Beach and Water)	318	198	120
4	Range of shopping possibilities (Shopping)	304	185	119
5	Opening hours and days (Shopping)	278	165	113
6	Amusement & theme parks (Culture & Leisure)	359	257	102
7	Smartphone application (Tourist Information Centers)	244	149	96
8	Signposting & facility of finding your way around (Transportation)	255	166	89
9	Transportation infrastructure (Transportation)	270	192	78
10	Safety for swimming (Beach and Water)	310	235	75
11	Nightlife (Culture & Leisure)	276	203	73
12	Opening hours and days (Tourist Information Centers)	243	176	67
13	Value for money (Shopping)	194	128	66
14	Diversity and choice (Food Experience)	253	192	61
15	Ease of communication with local people (Local Hospitality & Safety Feeling)	247	189	58
16	Theater, opera, cultural shows (Culture & Leisure)	243	185	58
17	Cleanliness of public areas (Environment)	239	183	56
18	Number of information centers (Tourist Information centers)	204	148	56
19	Beach beauty (Beach and Water)	354	298	56
20	Access to & from the airport (Transportation)	275	220	55
21	Overall quality (Accommodation Experience)	268	213	55
22	Efficiency of personnel (Tourist Information Centers)	237	184	53
23	Cleanliness outside cities (Environment)	247	200	47
24	Hospitality of personnel (Shopping)	228	183	45
25	Diversity & range (Beach and Water)	304	262	42
26	Architecture and urban development (Environment)	262	227	35
27	Taxi service (Transportation)	190	158	32
28	Diversity & range (Culture & Leisure)	273	242	31
29	Hospitality of personnel (Accommodation Experience)	271	243	28
30	Hospitality at entry point (Transportation)	201	179	22
31	Cost of transportation to reach the destination (Transportation)	157	136	21
32	Value for money (Accommodation Experience)	199	180	19
33	Safety & feeling of security (Local Hospitality & Safety Feeling)	238	221	17
34	Guided tours (Culture & Leisure)	242	226	16
35	Quality of handcrafts & souvenirs (Shopping)	205	190	15

43

Table 4 (continued): U.S. vs CanMex Benchmark
U.S. Is Competitive
(within 10 Points of CanMex Benchmark)

	Component and (Category)	U.S. Score	CanMex Benchmark Score	Difference Between U.S. and CanMex Benchmark
1	Entrance fees	226	217	9
2	Overall quality (Food Experience)	233	225	8
3	Price of leisure activities (Culture & Leisure)	233	227	6
4	Hospitality of personnel (Food Experience)	134	128	6
5	Hospitality of personnel (Historical Heritage)	281	276	5
6	Convenience of visiting busy tourist attractions & crowdedness (Historical Heritage)	227	224	3
7	Price of public transport (Transportation)	200	206	-6
8	Management & maintenance (Historical Heritage)	289	296	-7
9	Value for money (Food Experience)	169	178	-9

U.S. Has a Competitive Disadvantage
(-10 Points or Less Compared to of CanMex Benchmark)

	Component and (Category)	U.S. Score	CanMex Benchmark Score	Difference Between U.S. and CanMex Benchmark
1	Hospitality of personnel in public transport (Transportation)	174	196	-22
2	Accessibility of public transport (Transportation)	242	267	-25
3	Hospitality of local inhabitants (Local Hospitality & Safety Feeling)	211	246	-35
4	Beauty of landscapes (Environment)	269	307	-38
5	Diversity of range (Historical Heritage)	275	323	-48

Section 2. U.S. Travel and Tourism Industry's International Competitiveness through Internet-Based Ratings and Reviews

A. Methodological Overview

Consolidating Ratings and Reviews
- TRAVELSAT© Pulse uses a solid **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**. These have been **converted from their original source** and are **weighted to adjust the significance** that each source score has. 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 14 languages:** *Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish*. However, **ratings and reviews are collected for all sourcing markets** sharing their experience on the rating platforms.

Scope of Analysis: 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 having **45 sources connected**[1], 95% 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.**

Scope of Analysis: Sample definition & analysis period
- Using Trip Advisor to identify properties across all regions of the United States, a sample was used in order to create a **representative picture of its full tourism ecosystem.**
- A **one-year period** has been selected for analysis, ranging from **January 1st to December 31st, 2019.**
- The **Competitive Benchmark** is a merging of the competitive benchmarks sets used in Section 1: *France, Spain, UK, Italy, Germany, Thailand, UAE, Canada, China, Mexico, Portugal, Egypt, Morocco, India, Russia, Cuba, Japan, and Greece.*

Reviews Corpus Analysed

Verticals	Review Volume (01/01/2019 to 12/31/2019)
Accommodations	919,194
Attractions	267,233
Restaurants	231,111
Total Sample	**1,417,538**

B Global Ratings

Scores from the United States as a Whole & its 3 Main Verticals - Attractions, Restaurants and Accommodations

The average score of all consolidated experiences from international visitors in the United States in 2019 **stood at a satisfactory 8.31 out of 10.** Breaking down all scores by vertical, the **experience tied to Attractions held the highest scores,** at an 8.91. **Restaurants did not fall behind by far,** with a score of 8.38. Both of these scores were very close to the Competitive Benchmark.

The Accommodations sector held a lower score, at 8.11 – the comparison against the Competitive Benchmark reveals a significant shortfall in the ratings for this vertical.

Overall Rating and Major Vertical
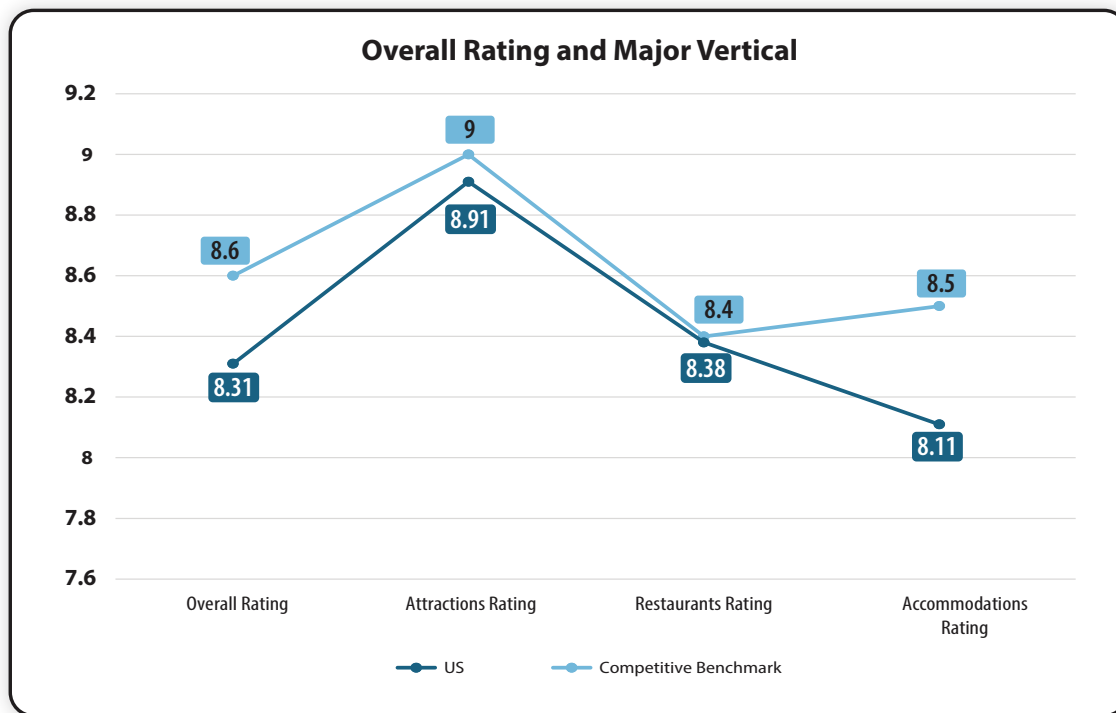
Scores for the United States' Top International Source Markets

Breaking down ratings per market shows that visitors from **Australia,** the **Dominican Republic**, and the **United Kingdom scored their experiences the highest.** Australian visitors held a **high appreciation for the offer of entertainment** they experienced. Moreover, several markets gave **ratings that are higher than the average overall score,** visitors from the **Netherlands, Spain, Japan,** and **South Korea left lower ratings on average,** albeit with generally satisfactory scores.

U.S. Overall Rating per Major Source Market

Legend: ■ Rating per Market – – Overall Rating
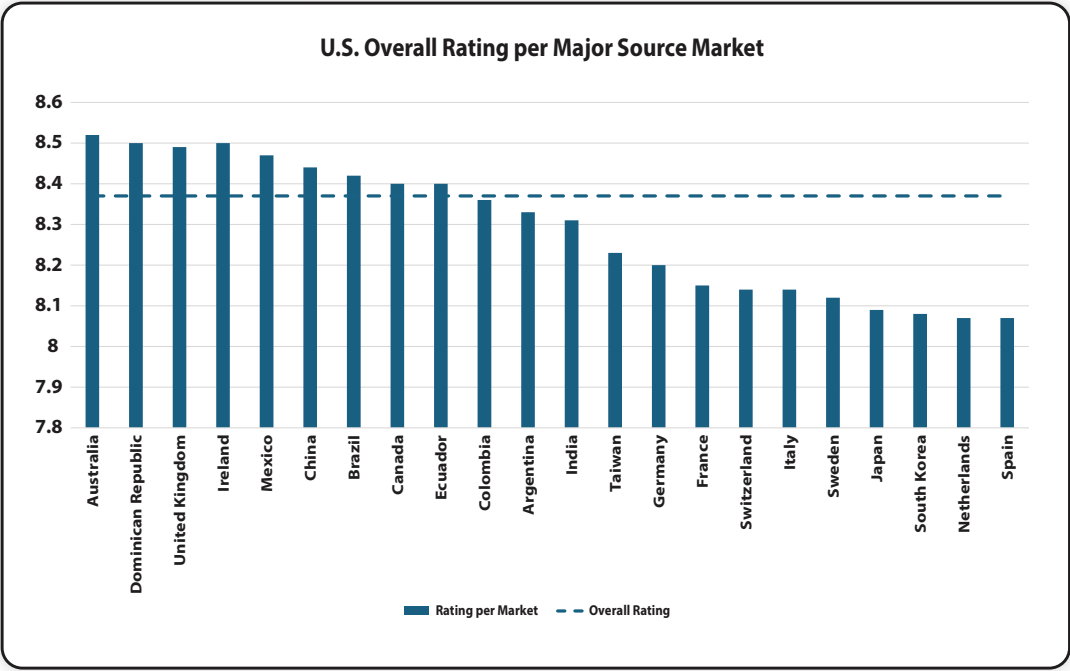
Sentiment Analysis[17]

Guests' Written Reviews on Topics Characterizing their Experience:

Activities: Analyzing written reviews, visitors **spoke most positively about the activities** they engaged in. The most outstanding aspect was the **level of entertainment available.** However, the **variety and types of attractions** was the topic most often spoken about, also having a very positive score.

Activities 9.30

Topic	Mentions	Sentiment Score
Entertainment	2928	9.76
Attractions	18096	9.25
Entertainers	1237	8.99

[17] **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.

Location: The **location** of operators in the United States, including both their **surrounding area** and the **transport options for arrival,** followed Activities in terms of the degree of positive mentions in written reviews. At the same time, **travelers were particularly happy with the surrounding area,** with **transport having held a slightly lower score.**

Location 8.91

Topic	Mentions	Sentiment Score
Surrounding Area	241227	9.15
Transport	110377	8.39

Food and Beverage: **Food and beverage stood in third place,** with several very **highly considered topics,** such as the **food quality,** and the **variety of restaurants** and **bars** available. While mentions about **drinks** and **breakfast** were not as positive as the three prior topics, they **still held a very high level of positivity.**

Food & Beverage 8.81

Topic	Mentions	Sentiment Score
Food	114996	9.29
Restaurants	203651	9.19
Bar	53440	9.00
Drinks	73316	8.89
Breakfast	206317	8.07

Cleanliness: Cleanliness aspects followed in terms of positive mentions, with general **housekeeping,** and **overall hygiene having held positive scores.** However, written reviews mentioning problems with **odors** or **humidity had a higher degree of negative written feedback** than positive reviews, being under the desired threshold score of 5.

Cleanliness 8.44

Topic	Mentions	Sentiment Score
Housekeeping	150268	9.17
Hygiene	163640	8.62
Odor	19788	3.37
Humidity	4828	0.34

[17] **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).

Facilities: **Facilities,** while holding the 5th position, **had a very positive score overall.** Topics that received the **highest scores include** the **spas, sports facilities,** and **rooms** found in accommodations. While still being very positive, comments related to **toilets, bathrooms, internet provision,** and **air conditioning** were more mixed.

Topic	Mentions	Sentiment Score
Spa	5486	9.05
Sport facilities	71710	8.99
Rooms	572058	8.13
Toilets	260	8.03
Bathroom	164494	7.87
Internet	25223	7.77
Air Conditioning	16538	7.72

Facilities 8.14

Service: Visitors' experiences with several **aspects tied to service were largely positive** especially when it came to **staff** and asking for **support.** Experiences at the **reception were also positive.** Feedback was **more mixed** in relation to placing **orders, ticket offices** at attractions, and **checking-in** and **out.**

Topic	Mentions	Sentiment Score
Spa	5486	9.05
Sport facilities	71710	8.99
Rooms	572058	8.13
Toilets	260	8.03
Bathroom	164494	7.87
Internet	25223	7.77
Air Conditioning	16538	7.72

Service 8.04

Key Indicators: The overall sentiment score for key indicators held a higher degree of positive feedback from travelers than negative reviews. Visitors considered that the value for money of their experiences was largely positive, and although reviews were mixed, the perceived sustainability was positive as well.
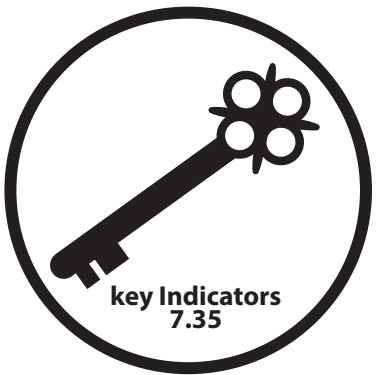
Topic	Mentions	Sentiment Score
Value for money	232001	7.89
Sustainable travel	1916	6.96
Sanitary safety	44530	4.58

key Indicators 7.35

49

Ambience: Although the overall sentiment score for ambience was below the desired minimum threshold of 5, **aspects related to décor, general atmosphere,** and **lighting were positive.** However, its score was **decreased by the negative reviews related to sound or noisiness,** which held **relatively high number of mentions** compared to other topics.

**Ambience
4.83**
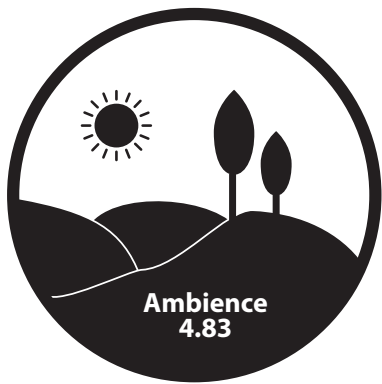
Topic	Mentions	Sentiment Score
Décor	16921	8.96
Atmosphere	1672	8.27
Lighting	16401	6.89
Sound	79160	3.45

C. Ratings Per Sub-Category

Attraction Sub-Categories - Scores for Attractions in the United States:

High ratings in outdoors and cultural experiences

While Attractions received the highest rating of all three verticals, ratings by sub-category demonstrate that **there was a high level of variance within.**

Experience fine dining topped of the list, holding a near-perfect score. Several **outdoors** and **cultural experiences** the United States is renowned for **have the subsequent spots,** including **environmental excursions, camping and hiking,** and **visiting American Indian communities.**

Being above the vertical's average, **experiences tied to cultural, historical,** and **heritage sights,** as well as general **sightseeing** and **museums, had very satisfactory scores.** The same can be said of **national parks.**

Sub-categories that **fell slightly short** of the vertical's average include **a mix of more urban activities,** such as attending **shows, event centers, nightlife,** and **experiences around transportation.** Very specific sporting activities, like snow sports and golfing also lagged slightly.

Regardless of this, **the vast majority of sub-categories received high visitor satisfaction scores** above 8.

Attraction Sub-Category

Sub-Category	Score
Casino & Gambling	7.83
Transportation	8.37
Clubbing & Dancing	8.38
Event Centers	8.44
Shopping	8.49
Golfing	8.52
Health Fitness Activities	8.67
Small Towns & Countryside	8.7
Amusement & Theme Parks	8.8
Snow Sports	8.81
Concerts Plays, and Musicals	8.88
National Parks & Monuments	8.92
Art Galleries and Musements	8.94
Sightseeing	8.97
Water Sports	9.05
Sporting Event	9.09
Historical Locations	9.1
Cultural & Ethnic Heritage Sights	9.11
Guided Tour (s)	9.15
Outdoor Adventure and Recreational…	9.15
American Indian Communities	9.19
Camping & Hiking	9.22
Environmental & Eco. Excursions	9.42
Experience Fine Dining	9.57

Attractions average 8.91

Restaurant Sub-Categories - Scores for Restaurants in the United States:

Desserts and bakeries were considered most highly by visitors

When it comes to the Restaurants vertical, **most of its sub-categories were scored more highly than the average.**

The United States' tradition in **desserts, sweets,** and **baked goods stood at the top** of the Restaurants vertical. **Wine bars,** and the large offer there is in **street food** has **also been very positively received** by international visitors.

While treading close to the vertical's average, **gastro-beer restaurants,** and **quick eating establishments also scored above.**

The only two categories to have **scored below the average** are **bars & clubs,** as well as **pubs,** although their scores were also very positive.

Restaurant Sub-category

Sub-category	Score
Dessert	8.65
Bakeries	8.63
Wine Bars	8.59
Street Food	8.55
Gastro-beer Restaurants	8.45
Quick Bites & Fast Food	8.4
Bar & Clubs	8.31
Pubs	8.24

Restaurant average 8.38
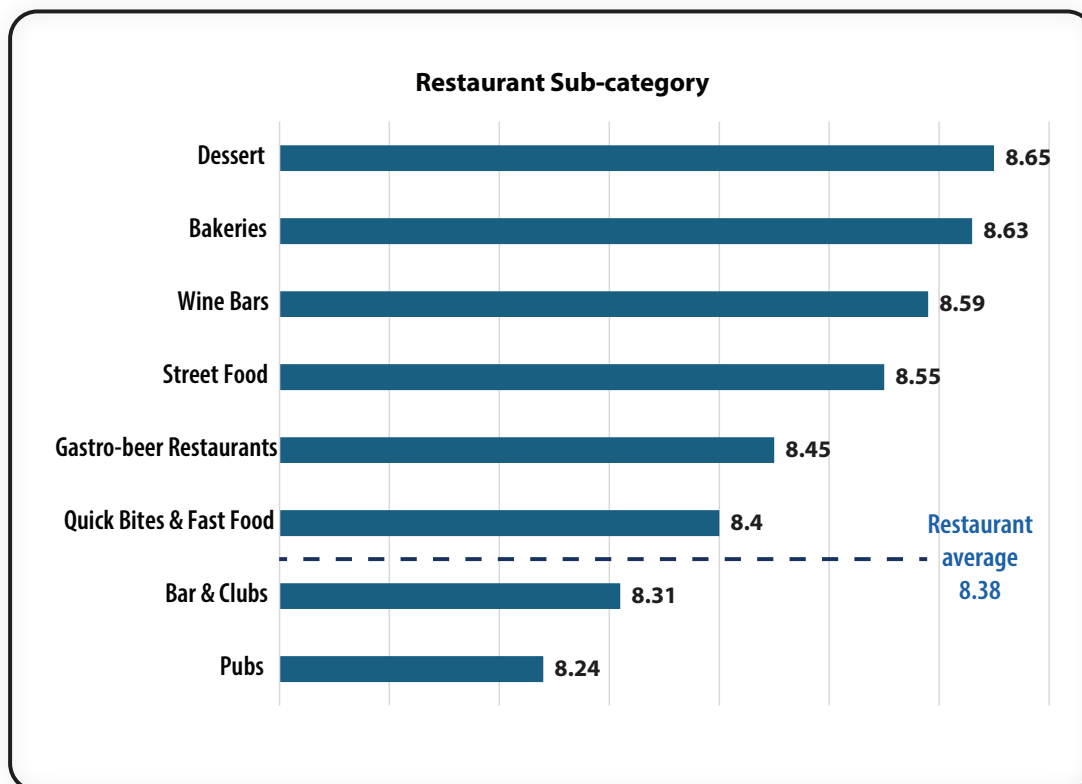
Accommodation Sub-Categories - Scores for Accommodations in the United States:

Self-rented and rural accommodation led in lodging experiences

In a similar fashion to the Restaurants vertical, **sub-categories for Accommodations generally scored higher than the vertical's average.**

The **category that was most highly scored,** and with a significant difference compared to all others, are **vacation rentals. B&Bs and inns,** as well as **apartment hotels, follow on by also having had very high scores** for accommodations.

A mix of rural accommodation, such as **ranches, villas, cottages,** and **camping** spots all **stood above the vertical's average** in 2019, sharing the spot with **all-inclusive** types of lodging.

Traditional **hotels,** being the most common form of accommodation travelers tend to choose, **scored right above the vertical's average.**

Guest houses and **boutique hotels** were **right under the average,** albeit having had satisfactory scores overall. On the other hand, **experiences in budget accommodation were scores with ratings below 8, meriting a slight degree of vigilance.**

Accommodation Sub-category

Sub-category	Score
Vacation Rental	9.72
B&B/Inns	8.86
Apartment Hotel	8.74
Ranches	8.66
Villas	8.53
All-inclusive	8.37
Cottages	8.31
Camping	8.24
Hotels	8.14
Guest house	8.07
Boutique Hotels	8.05
Hostels	7.92
Motel	7.73

Accommodations average 8.11

53
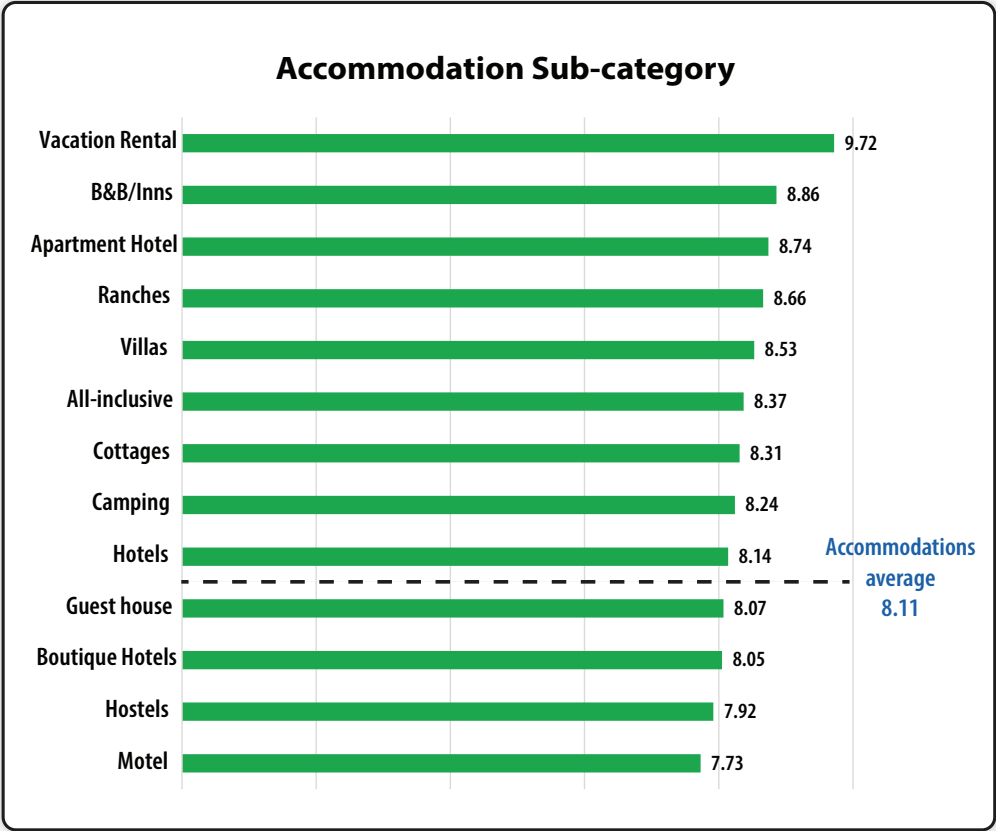
D. Ratings per Census Division

Overview by Census Division:

West and East Central South Central held the highest scores

Overall rating by census division reveals that international visitors rated their experiences highest in the states comprising West South Central and East South Central Census Divisions.

Written reviews show that interactions with staff stood out most positively for West South Central, while it was the level of entertainment that East South Central offered that made guests' experiences very satisfactory.

Trailing very closely behind were the Census Divisions of West North Central and New England, holding extremely close scores to the previous two.

At a third stance, the Census Divisions of East North Central, the Middle Atlantic, and Pacific can be found.

Finally, Mountain and the South Atlantic had relatively lower scores than other census divisions, although they still display a high level of visitor satisfaction.

Pacific	8.32
Mountain	8.27
West North Central	8.38
East North Central	8.35
Middle Atlantic	8.35
New England	8.38
South Atlantic	8.25
East South Central	8.39
West South Central	8.39
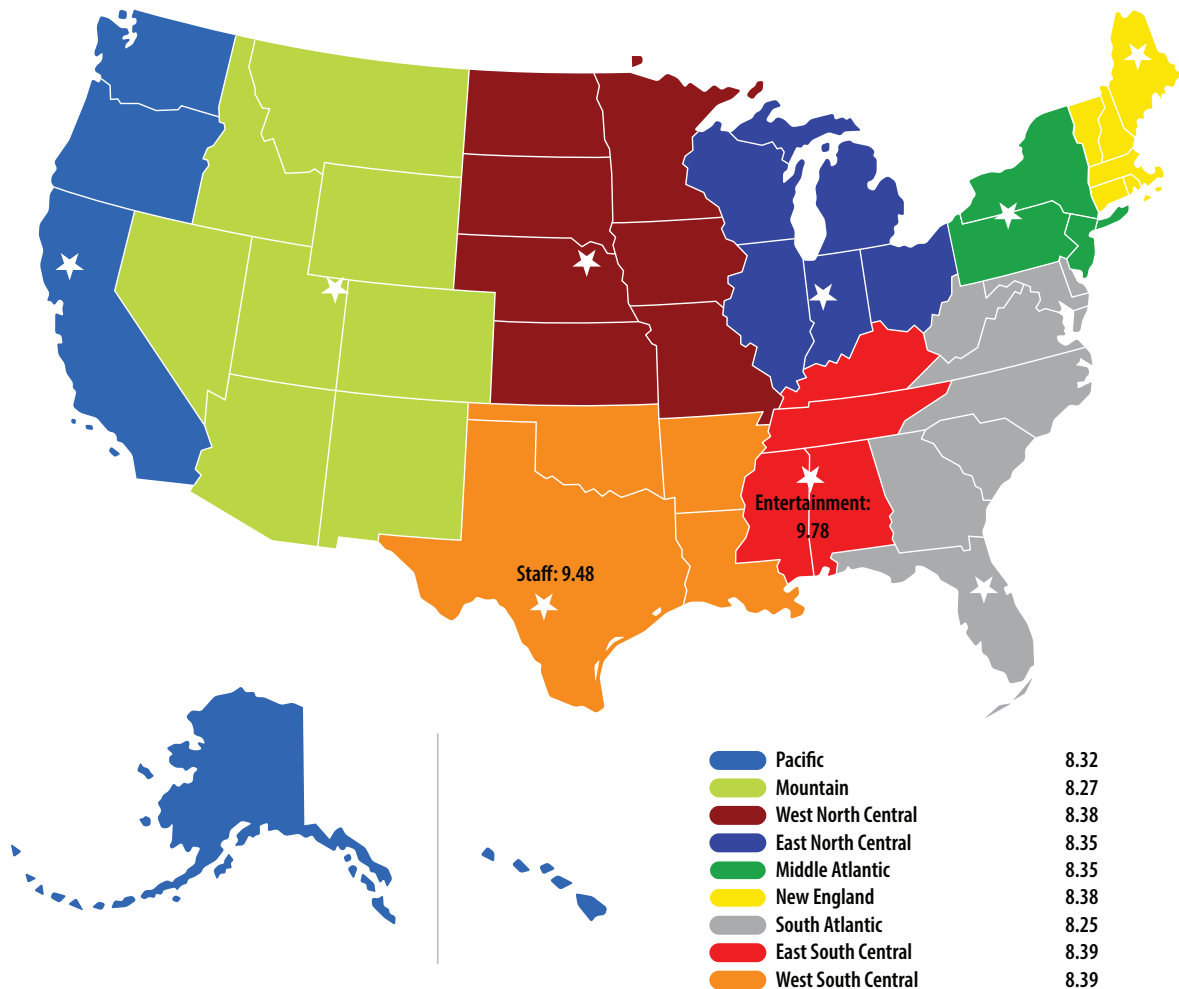
Verticals by Census Division - Attractions, Restaurants, and Accommodations Ratings by Census Division

The Attractions vertical led in visitor satisfaction in 2019
Census Division Ratings by Source Market

A view of the scores per vertical in each census division quickly reveals that Attractions was the most highly rated vertical, followed by Restaurants, and finally Accommodations. While East and West South Central had the highest overall scores, the highest score for Attractions was in fact in the Mountain census division. Restaurants, on the other hand, were most highly rated in West North Central, while the same can be said for New England's Accommodations.

Legend: ■ Attractions ■ Restaurants ■ Accommodations

Census Division	Attractions	Restaurants	Accommodations
East South Central	9.00	8.41	8.15
West South Central	8.85	8.37	8.25
West North Central	8.91	8.46	8.24
New England	8.87	8.35	8.26
East North Central	8.96	8.4	8.18
Pacific	8.88	8.41	8.14
Middle Atlantic	8.97	8.35	7.98
Mountain	9.1	8.33	8.16
South Atlantic	8.88	8.39	8.04
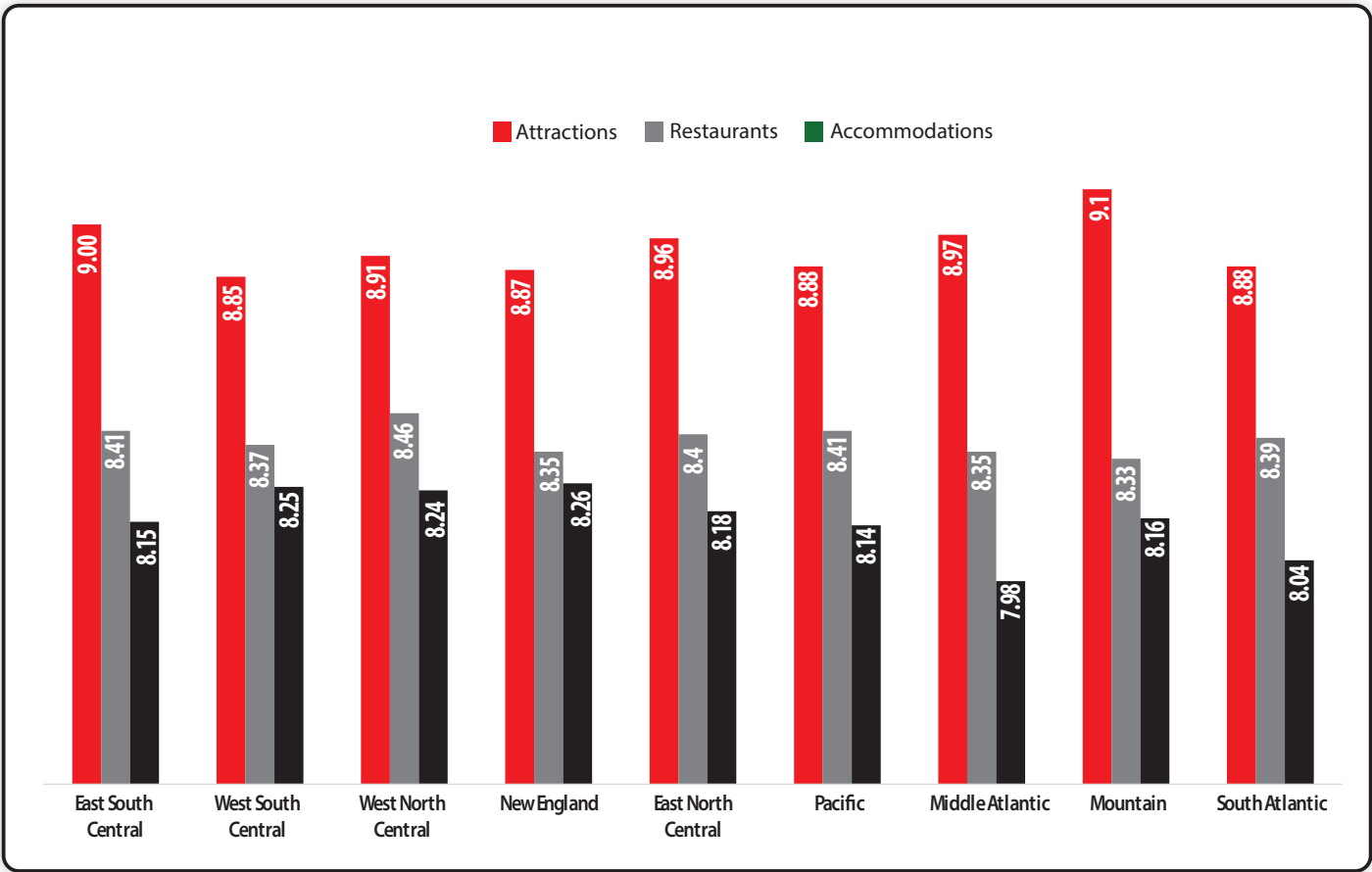
Census Division Ratings by Source Market

East South Central

Dominican Republic, Ecuador, and Australia as the most satisfied visitors

Variance in scores across markets for East South Central shows that a minority of the international markets taken into account scored their experiences above the census division's average. Guests from the Dominican Republic were the most satisfied, leaving especially positive comments on the quality of rooms at accommodations. Other markets having scored highly were Ecuador, Australia, while the Spanish and Japanese markets left lower scores.

East South Central

Market	Score
Dominican Republic	9.13
Ecuador	8.75
Australia	8.57
Republic of Ireland	8.54
Canada	8.53
United Kingdom	8.52
India	8.44
China	8.37
Mexico	8.33
South Korea	8.31
Argentina	8.27
Colombia	8.26
Brazil	8.23
Switzerland	8.18
Germany	8.11
Italy	8.09
France	8.08
Taiwan	8.04
Netherlands	8.03
Sweden	8.02
Spain	7.93
Japan	7.84

Division Average 8.39
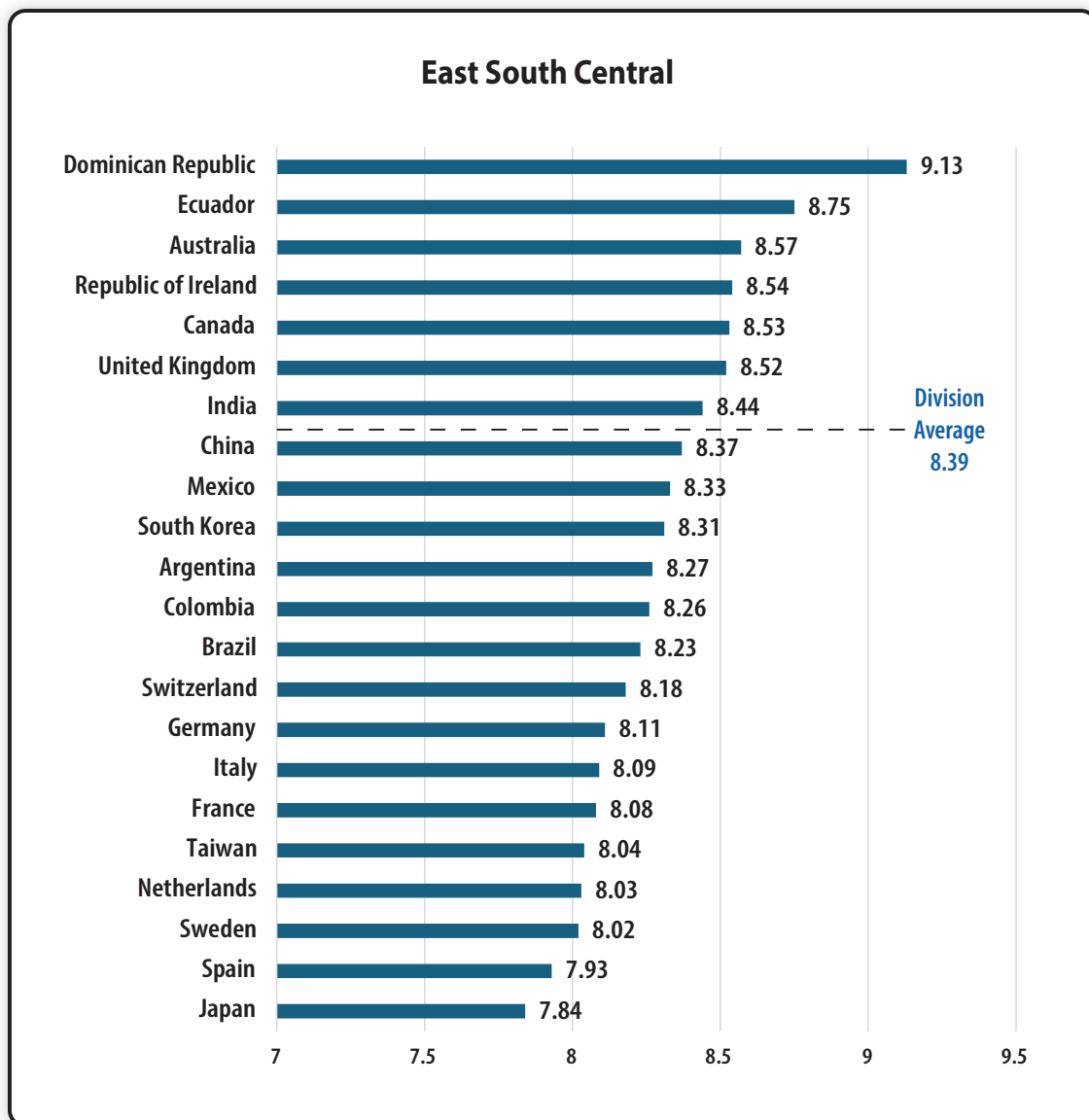
West South Central

English speaking visitors offered the highest ratings

Similar to East South Central, scores for West South Central per market show that most of the international markets considered gave lower ratings than its average. English-speaking markets left the highest scores, particularly being the case for Australia. Furthermore, Australians were most happy with the staff. Markets that provided the lowest ratings comparatively were European, including the Netherlands, Italy, and Spain.

West South Central

Market	Score
Australia	8.66
Ireland	8.65
Canada	8.62
Dominican Republic	8.59
United Kingdom	8.51
Ecuador	8.5
China	8.48
Taiwan	8.46
Colombia	8.35
India	8.34
Brazil	8.32
Switzerland	8.31
Mexico	8.29
Argentina	8.21
Germany	8.2
France	8.19
Sweden	8.18
South Korea	8.17
Japan	8.15
The Netherlands	8.13
Italy	8.09
Spain	8.03

Division Average 8.39
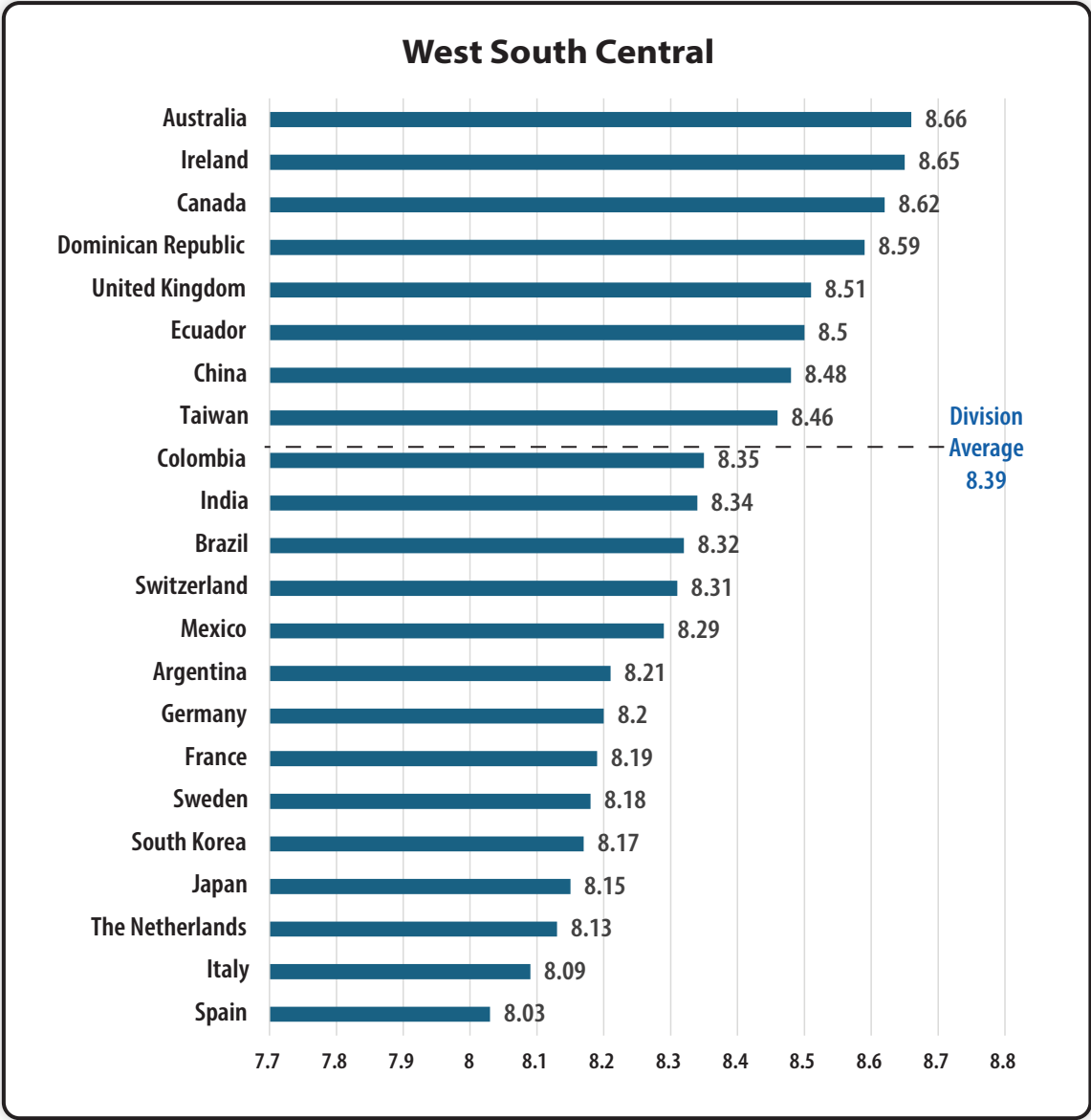
West North Central

China, Argentina, and Mexico rated their experiences highest

As opposed to the previous two census divisions, there was a more even split of the international markets analyzed that scored their experiences either above and below West North Central's overall score. Visitors from China presented the highest scores, with their written reviews about the offer of breakfast at accommodations having been fully positive. The Spanish, Italian, and especially Ecuadorian, markets left lower ratings on average.

West North Central

Country	Score
China	8.71
Argentina	8.61
Mexico	8.6
Australia	8.6
United Kingdom	8.55
Brazil	8.51
Taiwan	8.49
South Korea	8.49
India	8.47
Colombia	8.45
Canada	8.39
Ireland	8.38
France	8.28
Japan	8.26
Switzerland	8.22
Dominican Republic	8.21
The Netherlands	8.17
Germany	8.17
Sweden	8.14
Spain	8.11
Italy	8.05
Ecuador	7.73

Division Average 8.38
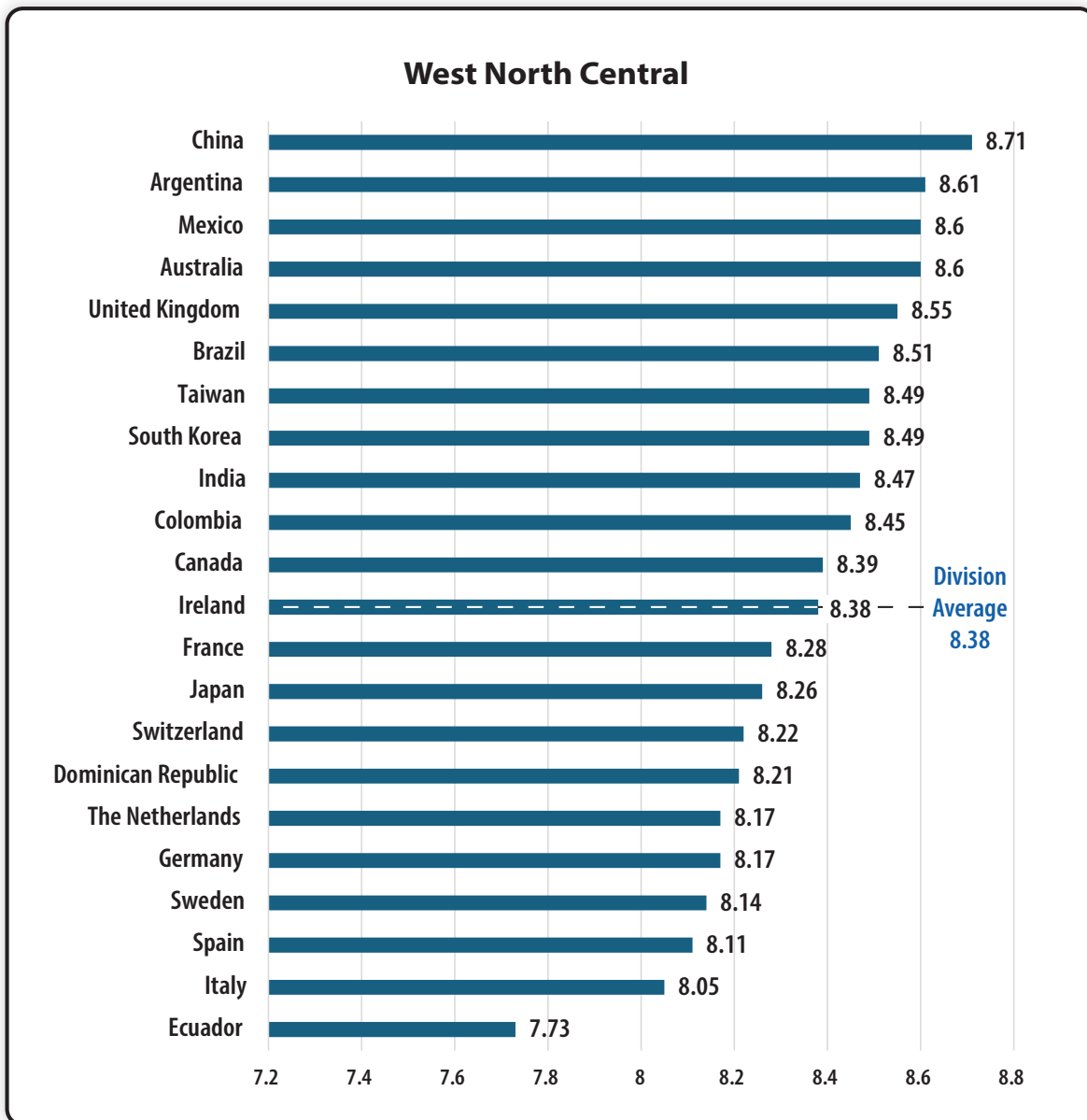
New England

Dominican Republic, Australia, and Brazil presented the highest scores

In a similar fashion to West North Central, a more even split of the considered international markets scored their experiences either above and below New England's overall rating. Visitors from the Dominican Republic were the most satisfied, with very positive comments for the offer of restaurants. Other highly scoring markets include Australia, Brazil, and Mexico, with Italy, Sweden, and the Netherlands at the other end of the scale.

New England

Country	Score
Dominican Republic	8.71
Australia	8.62
Brazil	8.61
Mexico	8.61
Ireland	8.57
Colombia	8.55
China	8.51
Argentina	8.51
United Kingdom	8.5
India	8.44
Canada	8.4
Ecuador	8.36
South Korea	8.31
Taiwan	8.27
Switzerland	8.23
Germany	8.16
France	8.15
Japan	8.13
Spain	8.12
Italy	8.12
Sweden	8.11
The Netherlands	8.1

Division Average 8.38
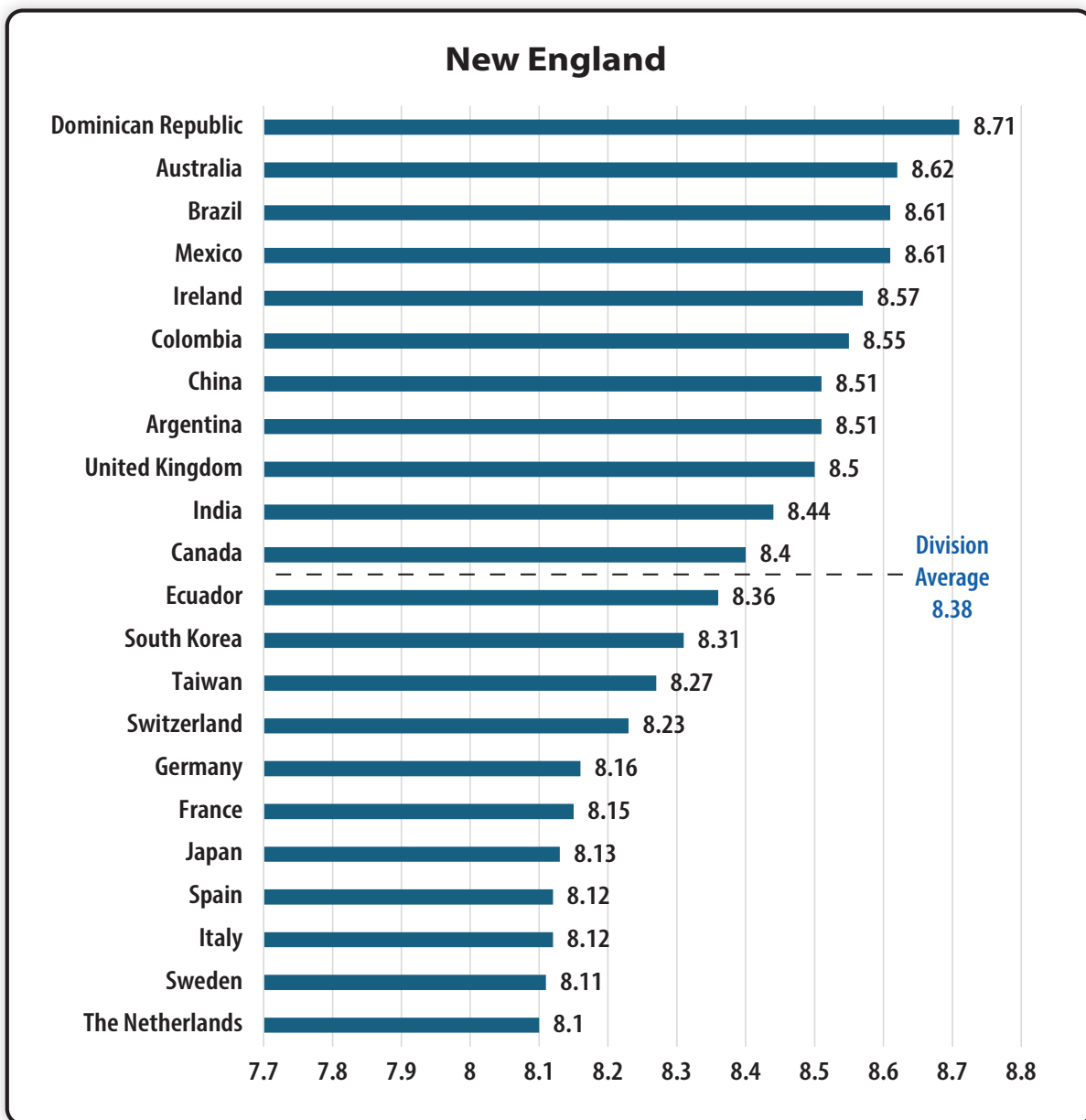
East North Central

Highest ratings seen from the Mexican, Brazilian, and Australian markets

Including ratings from the South Korean and Indian markets, which fell right on East North Central's average, the census division has a higher number of markets scoring above its average. Visitors from Mexico were most satisfied of all, with their comments on staff having been all positive. Brazilian, Australian, and guests from the United Kingdom also scored their visits highly, while German, Dutch, and Japanese rated theirs lower on average.

East North Central

Market	Rating
Mexico	8.62
Brazil	8.55
Australia	8.52
United Kingdom	8.5
Ireland	8.49
Colombia	8.47
Dominican Republic	8.47
Argentina	8.46
Ecuador	8.42
China	8.41
Canada	8.4
South Korea	8.35
India	8.35
Taiwan	8.24
France	8.22
Spain	8.2
Sweden	8.19
Switzerland	8.18
Italy	8.15
Germany	8.09
The Netherlands	8.07
Japan	8.04

Division Average 8.35
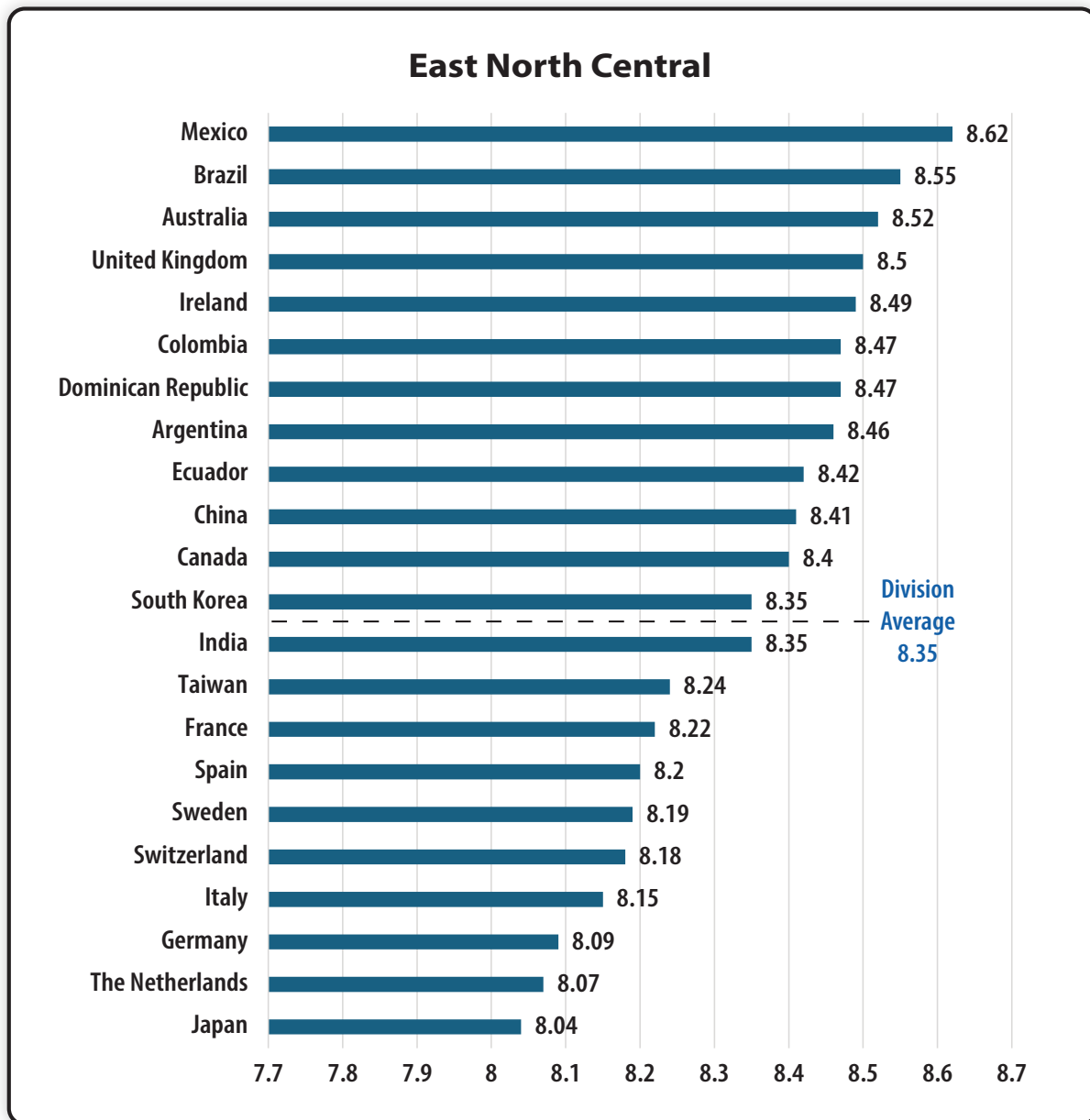
Middle Atlantic

Markets from the British Isles scored their experiences highest

A slightly higher number of international markets scored their experiences below Middle Atlantic's average. Visitors from the United Kingdom left the highest ratings, with very positive reviews when it came to the general atmosphere. Irish and Ecuadorian travelers also rated their experiences highly. On the other hand, the Asian markets of Japan, Taiwan, and South Korea left lower ratings on average.

Middle Atlantic

Market	Score
United Kingdom	8.51
Ireland	8.46
Ecuador	8.46
Brazil	8.45
Australia	8.42
Dominican Republic	8.41
Mexico	8.38
Colombia	8.33
Argentina	8.32
Canada	8.32
China	8.31
France	8.21
Italy	8.2
Germany	8.17
Spain	8.13
The Netherlands	8.1
Switzerland	8.07
India	8.06
Sweden	8.06
Japan	8.01
Taiwan	7.97
South Korea	7.89

Division Average 8.35
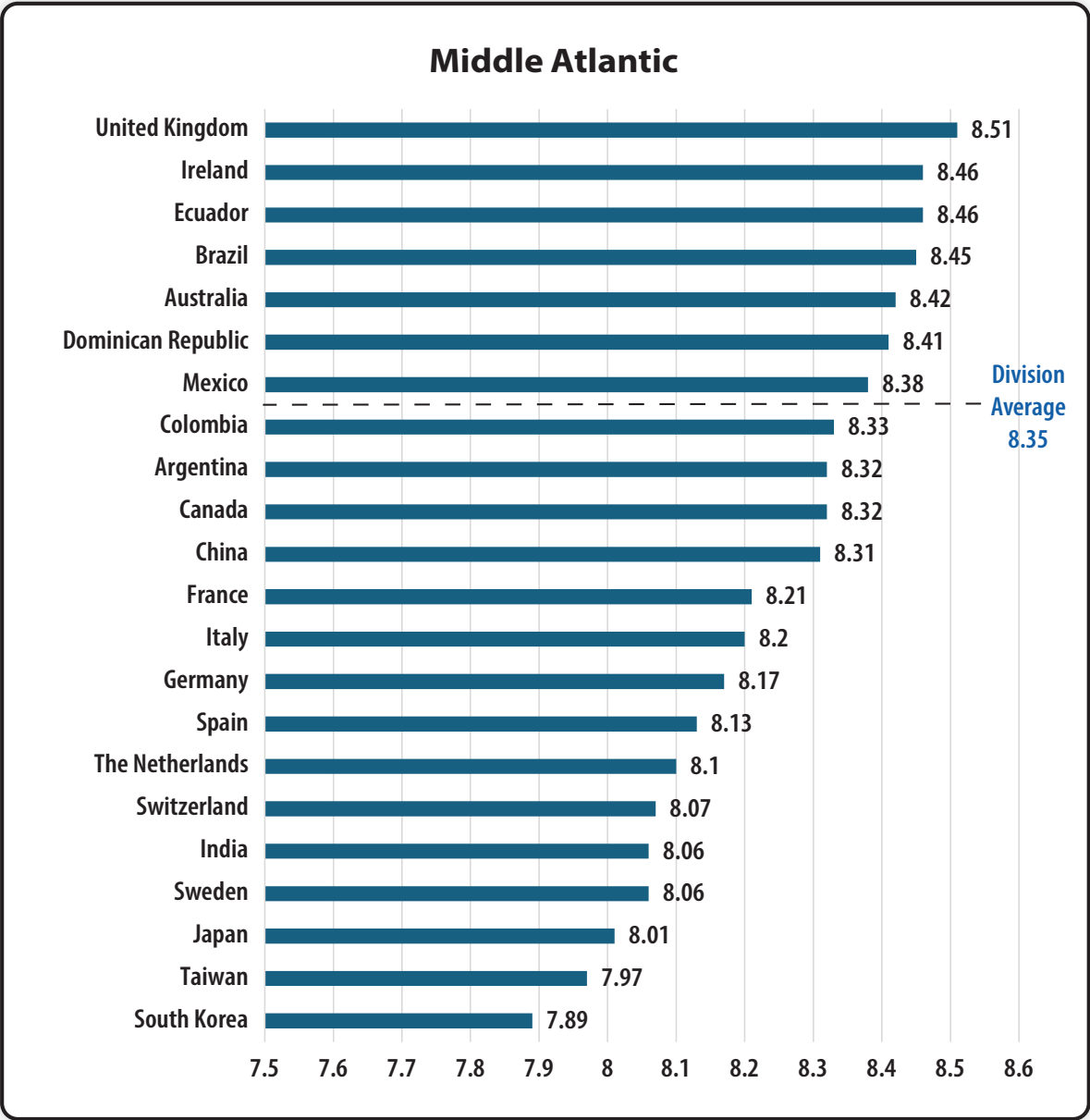
Pacific

Visitors from Australia, Mexico, and Ecuador left the highest ratings

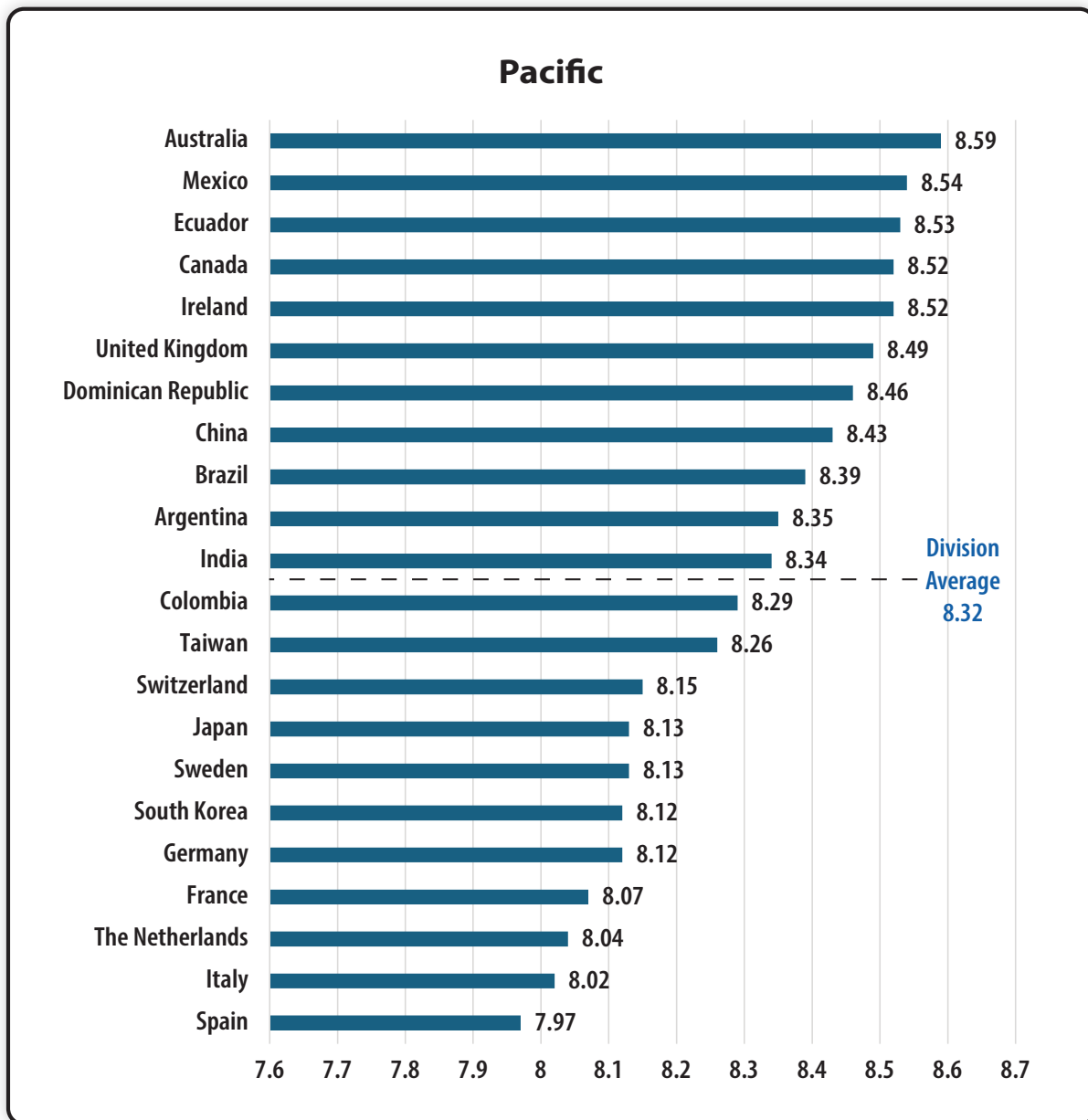Somewhat even numbers of the international markets studied scored either above and below Pacific's average, with the Australian market leading in visitor satisfaction. Written reviews from Australians show that they were most positive about the perceived possibilities for entertainment offered. Mexican and Ecuadorian visitors were also highly satisfied, with European visitors from the Netherlands, Italy, and Spain at the other end.

Pacific

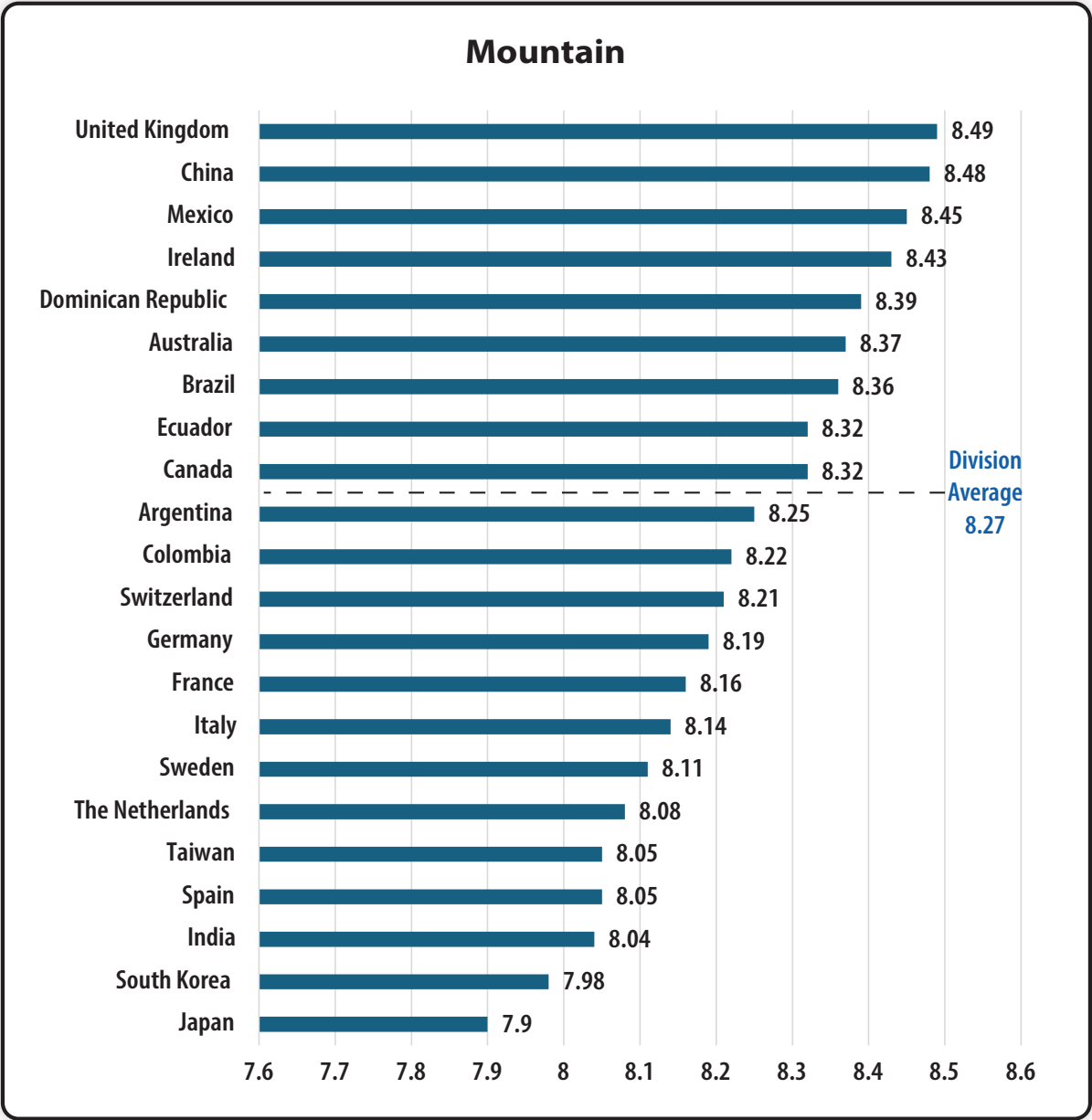| Country	Rating
Australia	8.59
Mexico	8.54
Ecuador	8.53
Canada	8.52
Ireland	8.52
United Kingdom	8.49
Dominican Republic	8.46
China	8.43
Brazil	8.39
Argentina	8.35
India	8.34
Colombia	8.29
Taiwan	8.26
Switzerland	8.15
Japan	8.13
Sweden	8.13
South Korea	8.12
Germany	8.12
France	8.07
The Netherlands	8.04
Italy	8.02
Spain	7.97

Division Average 8.32

Mountain

The United Kingdom, China, and Mexico markets marked their experiences highest

A minority of the international markets taken into account rated their experiences higher than Mountain's average. Those which had gave the highest ratings were visitors from the United Kingdom, attributing a very high degree of positivity in written reviews on the variety

Mountain

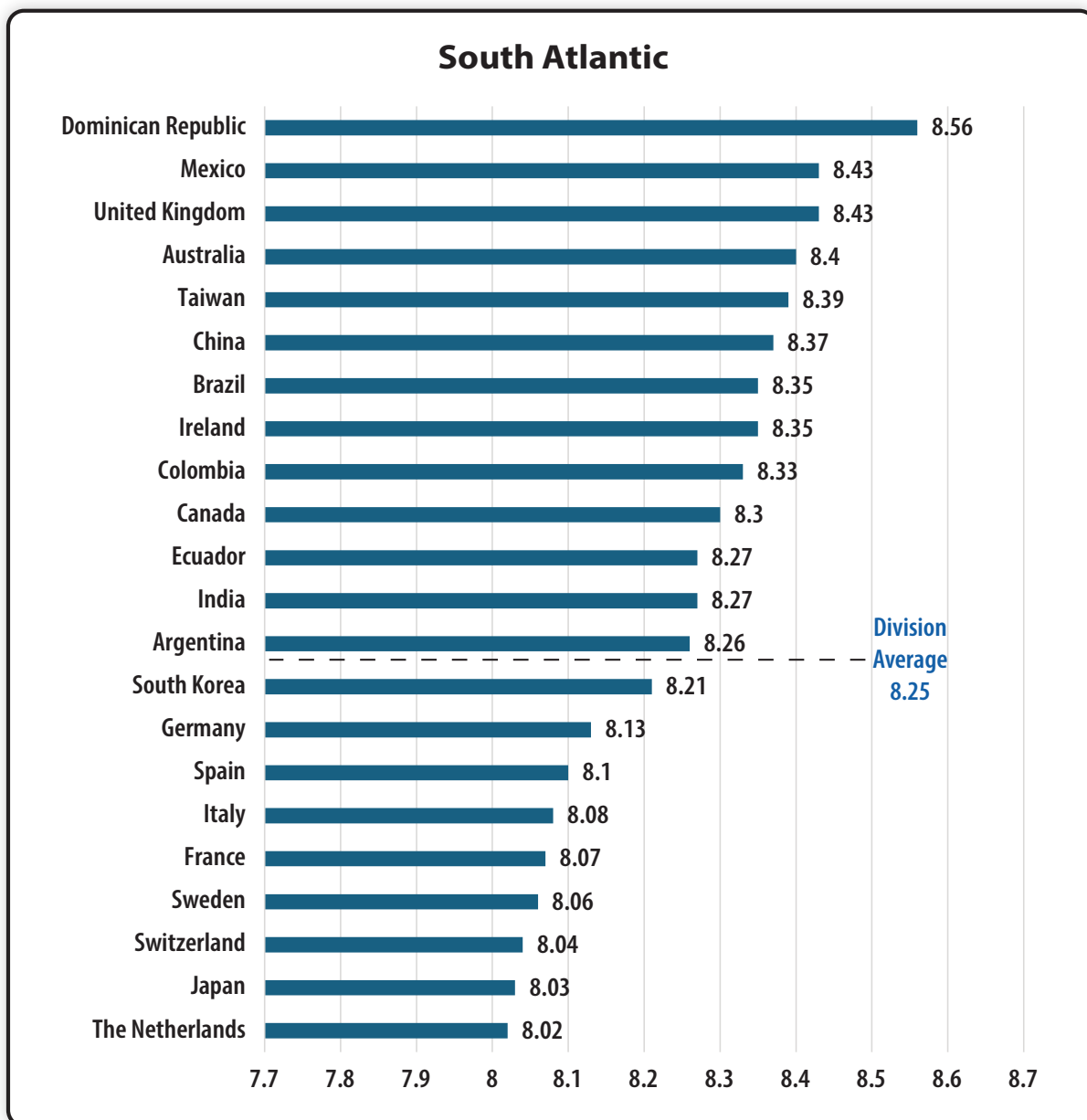| Market	Rating
United Kingdom	8.49
China	8.48
Mexico	8.45
Ireland	8.43
Dominican Republic	8.39
Australia	8.37
Brazil	8.36
Ecuador	8.32
Canada	8.32
Argentina	8.25
Colombia	8.22
Switzerland	8.21
Germany	8.19
France	8.16
Italy	8.14
Sweden	8.11
The Netherlands	8.08
Taiwan	8.05
Spain	8.05
India	8.04
South Korea	7.98
Japan	7.9

Division Average 8.27

South Atlantic

Leading ratings left by visitors from the Dominican Republic, Mexico, and the United Kingdom

Finally, a majority of international markets scored their experiences higher in the South Atlantic census division than its overall average rating. Visitors from the Dominican Republic were most likely to leave the highest ratings compared to other markets, being especially pleased with the surrounding area where operators were. At the other end of the scale, travelers from Switzerland, Japan, and the Netherlands rated their experiences lower on average.

South Atlantic

Market	Rating
Dominican Republic	8.56
Mexico	8.43
United Kingdom	8.43
Australia	8.4
Taiwan	8.39
China	8.37
Brazil	8.35
Ireland	8.35
Colombia	8.33
Canada	8.3
Ecuador	8.27
India	8.27
Argentina	8.26
South Korea	8.21
Germany	8.13
Spain	8.1
Italy	8.08
France	8.07
Sweden	8.06
Switzerland	8.04
Japan	8.03
The Netherlands	8.02

Division Average 8.25