

TOP INBOUND MARKETS FACE VISA CHALLENGES IN VISITING THE U.S.

INTERNATIONAL INBOUND TRAVEL IS CRITICAL TO THE U.S. ECONOMY AND RECOVERY

In 2019, the U.S. welcomed **79 million international visitors who spent \$239 billion** at local hotels, restaurants, attractions, and other travel businesses—**leading international travel to be the U.S.’ largest service sector export.**

- Most of these visitors were for business or leisure, but they also include students and temporary workers.
- International travel spending is a U.S. export and international visitors generated \$239 billion in travel exports.

International inbound travel **plummeted in 2020 and remained at just 28% of 2019 levels in 2021.**

- This led to a combined **loss of \$315 billion in travel exports** in 2020 and 2021.
- Inbound travel has increased since the reopening of our borders to all in November 2021, but still **remained 55% below 2019 levels** in February 2022.

LONG VISA INTERVIEW WAIT TIMES ARE A DE-FACTO TRAVEL RESTRICTION

Analysis by Oxford Economics predicts international travel **will not return to 2019 levels until 2024.**

- Long visa interview wait times harm recovery by delaying or dissuading visitation by travelers whose spending supports millions of American jobs and billions of American exports.

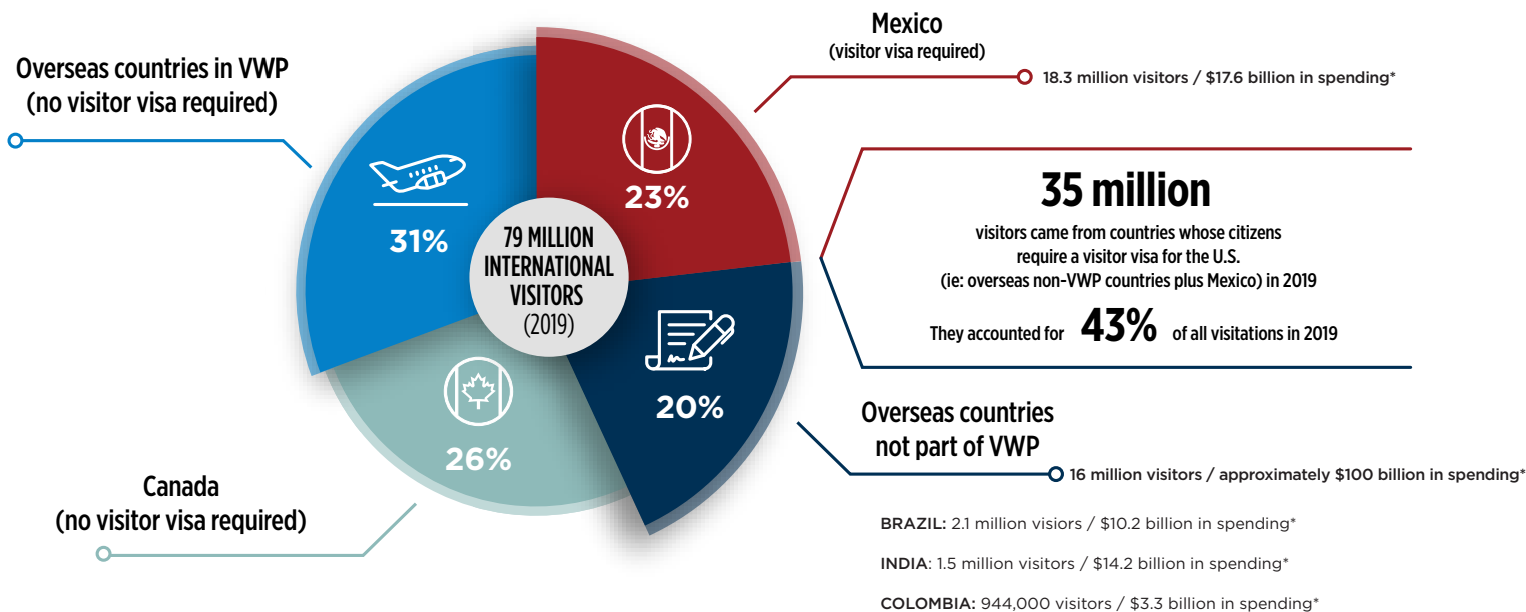


Visa wait times are measured in the number of days it takes an applicant to receive an interview appointment at a U.S. Embassy or Consulate.

A SIGNIFICANT PORTION OF THE WORLD REQUIRES A VISITOR VISA TO VISIT THE U.S.

Of the 79 million international visitors in 2019, **43% (35 million)** required a visitor visa (B1/B2). Total travel exports from countries requiring visitor visas were approximately **\$120 billion.**

- More than half of these visitors (18.3 million) came from Mexico, which accounted for \$17.6 billion in travel exports.
- Excluding Mexico, 16 million or 20% of international visitors, came from non-Visa Waiver Program (VWP) countries and required a visitor visa. Overseas non-VWP countries accounted for approximately \$100 billion in travel exports in 2019.



* Travel spending data reflects total travel exports from each market (including passenger fares, education/health/temporary worker spending)

INSIGHTS | TOP INBOUND MARKETS REQUIRING A VISITOR VISA FACE ASTONISHING WAIT TIMES

- In 2019, the top 10 inbound markets that require a visitor visa (B1/B2) generated more than 28 million visitors in the U.S.
- In 2019, eight of the top 20 inbound markets to the U.S. required a visitor visa.
- Since country-based travel restrictions were lifted, **average wait times for the top 10 inbound markets requiring a visa have gotten worse; growing from 419 days in May 2022 to 442 days in July of 2022.**
- If China is excluded due to its strict outbound restrictions, **the average wait time for markets that require a visa jumps to 496 DAYS.**
 - This is more than 100 days **WORSE** than average wait times in May.
- In May, 55% of U.S. consulates and embassies had a wait time over 365 days. In July, this number increased to 82%.



According to a January 2022 survey by Destinations Analysts, **excessive visa wait-times, the cost of visa fees, and an overall cumbersome visa application process** are some of **the top reasons international travelers are discouraged from coming to the United States.**¹

Inbound Market	Rank Among Top Inbound Markets	2019 Visitation Volume	2019 Spending in U.S. in Billions (Total Travel Exports)	U.S. Embassies/ Consulates Open (As of 5/3/22)	Avg. Visa Interview Wait Time in Days (As of 7/19/22)	2019 Total Non-immigrant Visas Issued
MEXICO	2	18,328,181	\$17.6	10 Open	568	1,471,148
CHINA (EXCL. HONG KONG)	5	2,829,970	\$33.2	4 Open, 1 Closed	9 (strict outbound restrictions apply)	1,255,992
BRAZIL	7	2,104,617	\$10.2	5 Open	382	625,856
INDIA	10	1,472,517	\$14.2	5 Open	523	985,469
COLOMBIA	13	944,013	\$3.3	1 Open	746	217,329
ARGENTINA	15	854,442	\$3.4	1 Open	504	225,412
DOMINICAN REPUBLIC	19	488,703	\$1.7	1 Open	600	100,668
EQUADOR	20	456,741	No BEA Data	1 Open	379	180,199
ISRAEL	23	450,572	\$2.0	1 Open	270	179,904
VENEZUELA	24	400,530	\$1.5	1 Closed	Closed	20,328
		Total: 28,330,286	Total: \$87 BILLION		Average: 442 Days	Total: 5,262,305

If the U.S. reduces average wait times for visitor visa interviews to less than 30 days, the U.S. **could generate an additional 2.2 million visitors and \$5.2 billion in spending** within the following six months.



While average wait times for travelers who need a visa to visit the U.S. **exceeds 442 days**, foreign travelers seeking entry to one of these countries only wait, on average, **26 days**.

Number of Consulates with Wait Times over 365 Days		
5/3/2022	16	55%
7/19/2022	23	82%

Number of Consulates with Wait Times over 100 Days		
5/3/2022	23	79%
7/19/2022	25	89%

Worst Five Wait Times		
5/3/2022	Hyderabad, IN	883
	Santo Domingo, DR	750
	Guadalajara, MX	702
	Bogota, CO	693
	Nogales, MX	626
7/19/2022	Bogota, CO	746
	Guadalajara, MX	744
	Nogales, MX	633
	Ciudad Juarez, MX	630
	Santo Domingo, DR	600

COUNTRIES WITH THE LONGEST CONSULATE WAIT TIMES



VISA PROCESSING REACHES MORE THAN BUSINESS AND LEISURE TRAVELERS

Business and leisure visas (B1/B2) make up the majority of visas issued, but special visas are also needed for temporary workers, students and other purposes. These visas are generally required for citizens of all countries—even those from VWP countries—and have also been impacted by long wait times.

- Long visa wait times also significantly hampers businesses' ability to reopen and increase capacity, when they rely on temporary and seasonal non-immigrant visa workers.
- Non-immigrant visas issued to residents of all countries (including non-VWP) in 2019 totaled 8.7 million.

EXAMPLES OF OTHER VISA CATEGORIES ESSENTIAL TO THE TRAVEL INDUSTRY

- **C1/D Transiting/Crew members** (285,000 in 2019): Airport and cruise line personnel servicing their aircraft/vessel
- **F Students** (389,000 in 2019): Students and spouses of students visiting for education purposes
- **H Temporary workers** (619,000 in 2019): Temporary foreign workers hired by U.S. businesses
 - **H-2B Temporary workers** (97,623 in 2019): Non-agriculture services workers are a significant need for the travel industry's workforce.
- **J-1 Exchange visitors** (353,000 in 2019): individuals participating in exchange visitor programs
 - J-1 Visa holders are interns, trainees, and summer work travelers (lifeguards, housekeepers, amusement and recreation workers, and food service)

VISA FEE INCREASE TO ENTER THE U.S. IS A DETERRENT TO TRAVEL

Top Global Market	Visa Fee	\$ Difference (Compared to U.S.)	How much more expensive is the U.S.?
TURKEY	\$60	-\$185	308%
EGYPT	\$60	-\$185	308%
FRANCE	\$95	-\$150	158%
ITALY	\$95	-\$150	158%
THAILAND	\$40	-\$205	513%
UK	\$130	-\$115	88%
CHINA	\$140	-\$105	75%
SAUDI ARABIA	\$176	-\$69	39%
UAE	\$180	-\$65	36%
UNITED STATES	\$245 / (current fee: \$160)		

In addition to long wait times for our top inbound markets, the State Department is proposing to increase the cost of all visitors visas including tourist, business, temporary worker, cultural and student visas.

Destination Analysts has said wait times and increasing fees will discourage travelers from visiting the U.S. which will extend the time it takes international travel to recover.

- With the new visa fee imposed later this year, the **U.S. will become the most expensive to visit**, among top global destinations.
- Fee increase of 53% for all non-immigrant visas
 - This fee differential puts the U.S. at a **global disadvantage** for attracting international visitors.

POLICY RECOMMENDATIONS

- **Increase staffing** at the embassies and consulates in key inbound markets, beginning with Mexico, Brazil and India.
- Develop a **pilot program for the use of videoconferencing technology** in visa interviews with low risk, returning visa applicants and visa applicants with urgent or time sensitive travel.
- **Waive visa interviews for low-risk visa renewals**, such as returning temporary workers and students.
- Conduct group processing the visa process more efficient for medium-to-large group travelers.
- **Delay and reconsider the proposed non-immigrant visa fee increase**, at least until international travel has recovered.