



TRAVEL AND TOURISM FOR THE U.S.



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U.S. Department of Commerce
March 2004





WHAT IS INTERNATIONAL TOURISM'S VALUE?

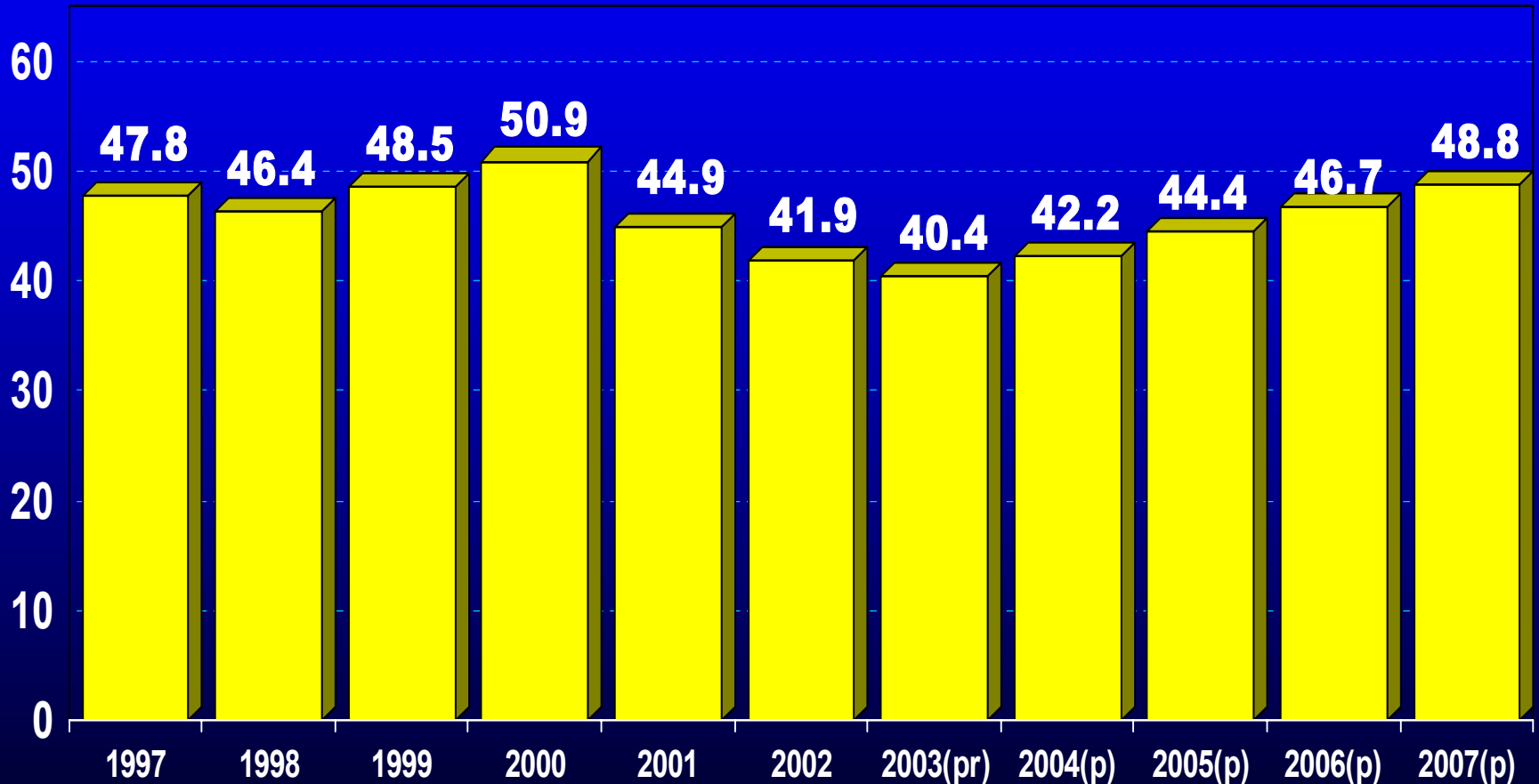
- **Travel & Tourism contributes over 3-1/2% to GDP (+\$700B)**
- **The largest service export – almost \$84 billion in 2002**
- **The fourth largest export overall**
- **Generated a trade surplus since 1989 (\$6 billion in 2002)**
- **Supported more than 1 million jobs**
- **Generated over \$14 billion in federal, state & local taxes**
- **As of December, 2003, international travel had increased 1 percent for the month, and was down 4 percent for the year.**



FORECAST OF INTERNATIONAL VISITORS

1997 - 2007(p)

Arrivals in Millions



Source: U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries;
Secretaria de Turismo (Mexico); Statistics Canada
p = projection; One or more nights, Issued October 2003 forecast
pr = preliminary estimate

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GERMAN TRAVEL TO THE U.S.



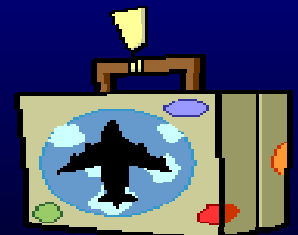
- **Germany is 3rd largest overseas market (1.2 million in 2003, down 1% from 2002)**
- **Spending by German travelers to the U.S. - \$2.8 billion in 2002**
- **German Travel Barometer – short term performance indicator**
 - **Positive bookings for next six months**
- **German travel forecasted to grow 29% from 2003-2007**





TOURISM INDUSTRY PERFORMANCE

- **Overall 6% growth in direct tourism-related sales for the 3rd quarter of 2003, compared to 3rd quarter 2002**
- **The fourth largest export overall**
- **Lodging supply, demand and revenues up**
- **Airlines - \$5 billion losses**
- **Restaurants - receipts up 7%**
- **Cruises - record year**
- **Domestic travel - receipts up 4%**





NEW INTERNATIONAL PROMOTION PROGRAM

- **15 member Travel & Tourism Promotion Advisory Board**
- **\$6.0 million funding level**
- **United Kingdom – single market pilot program**
- **Multi-disciplinary campaign**
- **Consumer focused**
- **Strong co-operative component to best leverage federal dollars**
- **Marketing firm will be announced within the next 2 weeks**



VISA ISSUES: Balancing Safety With Travel



- Implementing rule of personal interviews
- Suspension of Non-Visa Transit Programs (TWOV and ITI)
- Postponement of machine readable passports to October 26, 2004
 - Requirement for biometrics on Visas and Newly issued passports by October 26, 2004
- Added biometrics to current screening methods (e.g. Fingerprints)





AGENCIES OF THE TOURISM POLICY COUNCIL

Department of Commerce



Department of State

Department of Treasury

Department of Justice

Department of Interior

Department of Labor

Department of Transportation

Office of Management and Budget

Department of Agriculture

Department of Housing & Urban Development

Department of Homeland Security

Executive Office of the President

Office of the Vice President

U.S. Army Corps of Engineers

Small Business Administration

March 2004



The Quickest Way to International Tourism Information:
<http://ltinet.ita.doc.gov>

